Deltek

Deltek Talent Management 16.3

Reporting Tool User Guide

May 3, 2021

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Contents

Reports Overview

Use this area of the Help to learn of the Reporting Tool and all other Talent Management reports.

Reporting Tool Overview

It is important to note that all available DTM Reporting Tool functionality is covered here.

What you see on your screen depends on the modules your company uses as well as the permissions that are enabled for the group(s) to which you belong.

Navigation

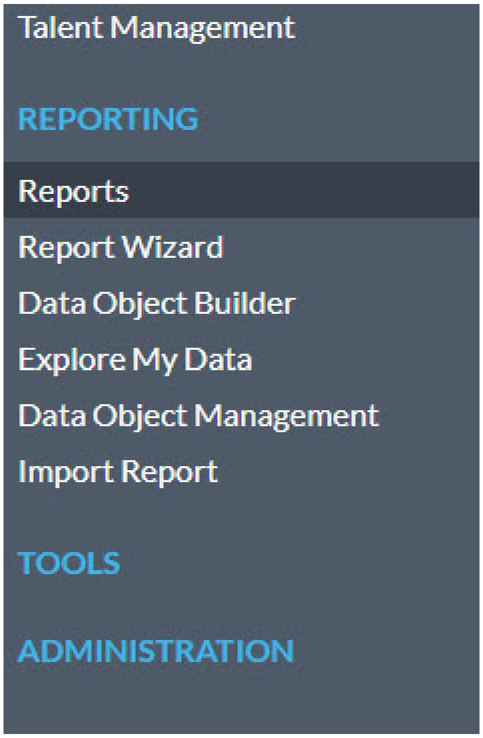
Get acquainted with the basic areas of the Deltek Reporting Tool.

The Deltek Reporting Tool contains the following areas:

- Navigation Pane
- Tool Bar

Navigation Pane

View and create reports and data objects, and manage system settings.



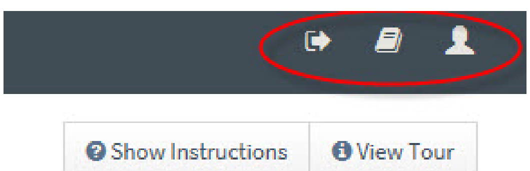
Note: The options you have access to depend on your permission level.

The main menu contains the following options:

- **Reports:** This lists all the reports you created and the reports other users in your company have created and shared.
- **Report Wizard:** This links to the wizard that guides you through the process of creating reports.
- **Data Object Builder:** This allows you to build and define new data objects to use in reports.
- **Explore My Data:** This offers a simple, intuitive way to navigate the relationships between our data tables and to search and use data objects on reports, without the need for a robust understanding of SQL. Each data object is presented in a way that clearly shows its relationship to joined data. Clients can use Data Explorer to analyze data, to export simple CSV files or PDFs, or to export data and create more complex reports.
- **Data Object Management:** This allows quick access for cleanup and deletion of unused objects.
- **Import Report:** This allows users to load exported reports back into the Reporting Tool. This is a helpful tool to move reports from development to production sites.
- **Administration:** This displays all available Administration functions.

Tool Bar

Access your profile, view the user guide, and log out of the system.



Access Reports

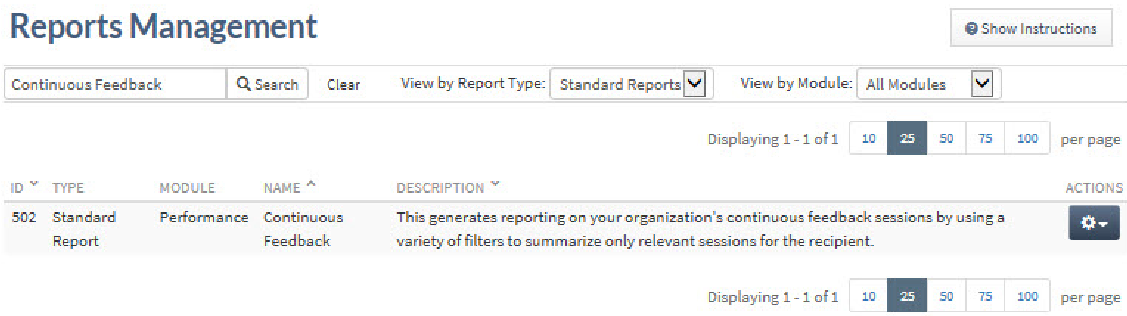
You can access reports to manage, share, run and schedule them.

- Manage Reports
- Share Reports
- Run Reports
- Schedule Reports

Reports Management

After you log in, the table of reports displays.

By default, the table on the Reports Management screen displays all the reports you have created.



Contents of the Reports Management Screen

View report details such as the name, type of report, and date created.

Column	Description
ID	This column displays the reference number assigned to the report by the system.
Report Type	This column indicates the type of report
Module	This column displays the module associated with the report.
Name	This column displays the name of the report. To modify the name, double-click it. The option to change the name is displayed with a **Save** and **Cancel** option.
Favorites Column	A solid gold star designates the report as a user favorite. Up to ten reports can be designated as favorites. Any type of report that displays on the Reports Management screen can be saved as a favorite, including shared reports that belong to administrators. To tag a report as a favorite: 1. On the Reports Management reports table, mouse over the hollow black star icon in the row for the report you want to designate as a favorite. When your cursor is correctly positioned, the star's black outline turns gold . 2. Click the star icon to select the report as a favorite. The star icon confirms your selection by turning solid gold

Column	Description
	and the report is saved to your list of favorites. To remove a report from your list of favorites: 1. Click the star icon for that report a second time. 2. Following deselection, the star icon reverts to ☆. To access the Favorite Reports list: 1. Take one of the following actions: ▪ Click the **Favorite Reports** filter option on the **View by Report Type** drop-down list. ▪ Click the ★ Favorite Reports button that displays for all **View by Report Type** filter selections with the exception of the **Favorite Reports** option. **Note:** All types of reports (including regular, standard, and shared reports, as well as the user's own reports) display together when you select the **All** filter from the **View by Report Type** drop-down. Since reports of all types can be designated as favorites, they will also display together in the Favorite Reports list.
Description	This column displays details about the report. To modify the description, double-click it. The option to change the description is displayed with a **Save** and **Cancel** option.
Report Category	This column displays the category source for the data contained in the report.
Created	This column displays the date the report was created.
Schedule Last Run	This column displays the date the report last ran.
Public	This column indicates whether the report is visible to all other users in your company.

> **Note:** Different columns display when viewing **All**, **Shared**, and **Standard Reports** report types. For **All** and **Shared**, there is a column to indicate the report owner.

Actions in the Reports Management Screen

Actions such as running the report and managing who can access the report are available to you based on your permission level and the report type you selected.

Action	Description
Run	Use this action to run the report.
Edit	Use this action to open the step-by-step wizard to edit report contents, such as columns or filters.
Share	Use this action to change who can access the report.
Copy	Use this action to create a copy of the report.
Delete	Use this action to delete the report from the system.
View Chart	Use this action to run the report data using a graphical chart.
Schedule	Use this action to schedule the report to run automatically at certain dates/ times.
Report Tags	Use this action to add keywords to help users find the report.
Change Owner	Use this action to select a different user as the owner of the report.
Report Status	Use this action to disable or enable the report. If a report is disabled, it cannot be run nor will the Scheduler attempt to send it. NOTE: If the report time-outs reach 10 due to some type of error, the system will disable the report automatically.

Search Reports

Enter keywords to retrieve reports.

To search for a report:

Enter keywords.
This triggers a search of report names, descriptions, and any tags created. The search results display only the reports that you own or have been shared with you.

Display Reports

There is an option to **View Reports by Type** by selecting from the drop-down list field options.

Use this option to display reports according to the module with which they are associated. This capability is especially useful for users who manage large numbers of reports.

- **My Reports**: This displays all the reports that you have created.

- **My Drafts**: This displays the reports that you have saved in Draft mode. This option will show only if there are Drafts pending.
- **Shared Reports**: This displays the reports that have been created by other users and shared with you.
- **Standard Reports**: This lists all default reports.
- **All**: This display all reports, regardless of type.

Filter Reports

You can filter the display of reports by their associated modules using the **View Reports by Module** drop-down list.

The default selection is **All Modules**, but you can select any of the following modules to filter the results:

- Core
- Cross-Posting
- Development
- Learning
- Performance
- Recruiting
- Referral

Save Reports

When you save your report in Step 3 of the Report Wizard, you can specify the module with which you want to associate the report.

Reports are usually associated by default with the module of the first report category chosen for inclusion, but you can override that default and assign the report to another category.

Shortcut Functions

You can use shortcut keys for certain actions. Clicking the letters defined below will prompt you to enter the Report ID you would like take the action on.

- **R** = Run a report
- **E** = Edit a report
- **S** = Schedule a report to run
- **H** = Share a report
- **C** = Copy a report
- **O** = Change the report's owner

> **Note:** The **Actions** menu label for each of these actions are underlined to provide a reminder that these shortcut keys are available.
>
> The ability to use shortcut keys is a system setting that is managed in the Administration section. To enable/disable shortcut keys, go to **Administration** » **Manage Settings** » **Presentation** » **Enable Shortcuts**.

Share Reports

You can share the report with everyone by making it public, or specify that only certain users have access.

To share reports:

1. Click **Share** in the **Actions** menu.
2. In the new window that opens, locate the **Make Report Public** field.

   This field indicates the current visibility of the report. To change the visibility setting, select the appropriate radio button, **Yes** or **No**.
3. Click **Change Public Status**.
4. If you want to give access to the report to only certain users, use the search option provided.
5. In the search results, select the check box beside the user(s) you want to share the report with.
6. Click **Add Selected Users**.

   This allows the users you selected to access the report from the **Reports Management** screen when selecting the **Shared Reports** report type.

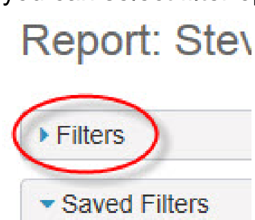
Run Reports

You can run the report from the Actions menu.

To run a report:

Select **Run** from the **Actions** menu.

If conditions or filters were added when the report was created, a screen displays where you can select filter options for the report.

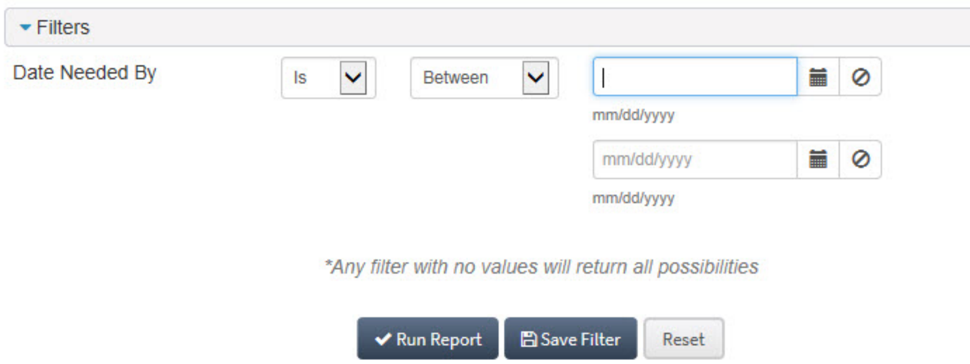


Use Report Filters

You can use report filters to specify the data that displays on your report.

To use condition/filter options:

1. Expand the **Filters** section to view the available options.



2. Select the criteria you want to use to filter the report.
   Keep in mind that selecting none of the options is the same as selecting all filter options.
   Depending on the type of option, there will be different "operators" shown:
   - **is/is not:** Selecting **is not** will return all values except the selected value
   - **Equal to:** Checks if the value is equal or not
   - **Greater than**
   - **Greater than or Equal to**
   - **Less than**
   - **Less than or Equal to**
   - **in/not in:** Matches a value in a list (or not)
3. Click **Run Report** to execute the report or **Save Filter** to save the conditions you selected for future use.
4. If you choose to save your filter, you will be asked to enter a value in the **Condition Name** field and to type a brief description in the **Condition Description** field.
   Select the **Public?** check box if you want to render your filter criteria visible to other users who view the report.
   The saved filter is displayed under the **Saved Filters** section, with an option to run it or delete it.
5. If you mark a filter as the **Default**, it will be used for distribution lists on any scheduled runs of the report.
   When you create or edit the distribution list for a scheduled report, the report's default condition is pre-selected when the dialog is displayed.

Edit Search Filters

You can edit previously created filters.

To edit a previously saved search filter:

1. Expand the **Saved Filters section**.
   Click the button, then edit the filter details. Select the **Public?** check box if you want to render your filter criteria visible to other users who view the report.
2. Click **Save Filter** to save your changes.
3. Click **Run Report** to generate a report using your new filters.

Search Through Large Filter Conditions

If the number of options in a filter is more than 100, you will see an empty selection box with the number of values listed in red font above it.

You will need to search within this filter for the desired data.

To search through large filter conditions:

1. Click **Search Values**.
2. A new window opens, with the left section pane displaying all the values.
   Either select from the listing or use the search option.
3. Click **>>** to move your selected options over into the **Selected Items** section.
4. Click **Insert Values Selected** to close the window and insert the options into the filter.

Report Output Screen

The output screen contains the following sections: **Filters**, **Saved Filters**, and **Results**.

The Results section is expanded by default and the number of rows in the report are displayed.
You can re-filter the report by selecting from the filter options. You can also export the report in several formats, such as .csv, .xls, and PDF.
A Time/Date stamp displays in reports when exported in the PDF and XLS formats.

> **Note:** If the Prompt check box (found on the Groupings tab on Step 2 of the Report Wizard), is selected, users can distribute the same report to various stakeholders, but filtered with different groupings tailored for diverse recipients. For more information, see the Prompt Check Box topic under Create Reports, Step 2, Build a Report.

Schedule Reports

You can schedule each report to run automatically at a specified date and time.

To schedule reports:

1. Select Schedule from the **Actions** menu on the Reports Management screen.
2. A modal window opens. Select when the report should run, by choosing one of the following options:

Option	Description
Daily	Select this to run the report every day of the week, including Saturdays and Sundays.
Weekly	Select this to run the report every week and on multiple days during the week if desired. This can be on-going or set to run only for a certain number of weeks.
Monthly	This option allows the report to run on a monthly basis or every other month. The user also has the option of choosing to run on a specific day of the month, for example: the 3rd Friday of every month for the next 12 months.

Note: When setting up report cycles (for example, monthly or quarterly) you can schedule reports for days of the month earlier than your start date, which is the current date. For example, the current date (your start date) is February 15, and you want a report to go out the 1st of every month. Since February 1st has already passed, Talent Management schedules the next report to go out on March 1. Cycles (one month, three months, and so on) are calculated from your start date.

3. Click **View/Edit Distribution List** to select the recipients of the report.
4. Scheduled reports can run against a saved filter.

   You can select a specific filter for the report to use if any filters have been saved. In the **Conditions List** field, select a filter.
5. The section below the **Conditions List** field displays any recipients who are already scheduled to receive the report using that filter. If none exist, they can be added.
6. Click **Search** to add users.

   You can search for users by first name, last name, or email address.
7. Select the check box next to the individual's name and click **Add Selected Users**.
8. To add non-Deltek Talent users as recipients of the scheduled report:
9. Click the Adhoc E-mail tab.
10. Enter one email address per row.
11. Click **Add**.
12. Click **Close Window**.
13. In the **Start Date** field, enter the date when the scheduler should start sending the report.

14. In the **Run Time** field, select the time.
15. In the **Report Formatting** field, select which of the following formats to use for the report:
    - **HTML**
    - **CSV**
    - **PDF**
    - **XLS**
16. If you selected **HTML**, in the **Report Formatting** field, select one of the following content types:
    - **Attachment Only**
    - **Email Body Only**
    - **Email Body and Attachment**
17. Select the **Enabled** check box is selected to set the report schedule as active.

    To disable the schedule for this report, unselect the **Enabled** check box.
18. Select the **Only send non-empty reports** check box if you want to prevent the distribution of scheduled reports that lack attachments or other content.

    Click **Save**.

Create Reports

The Reporting Tool offers three options for creating reports.

Use Data Explorer: Use Data Explorer to analyze data, to export simple CSV files or PDFs, or to export data and create more complex reports. The Data Explorer feature is a simple, intuitive way to navigate the relationships between our data tables and to search and use data objects on reports, without the need for a robust understanding of SQL. Each data object is presented in a way that clearly shows its relationship to joined data.

Use the Report Wizard: The Report Wizard provides two options for creating a report. You either start by selecting a pre-defined category or you create a new, empty report for which you manually select data source categories.

- **Start with Standard Reports Using the Report Wizard:** With this method, you select one of the pre-defined report categories. When you start with a pre-defined category, the data sources for that category are automatically selected for you.
- **Start with an Empty Report Using the Report Wizard:** Creating an empty report is considered a more advanced procedure, because it requires more knowledge of database structure, table joins, or the other complexities surrounding reporting from scratch.

Create Reports with Data Explorer

When you use Data Explorer to create reports you don't need a robust understanding of SQL. Navigate the relationships between our data tables, and search and use data objects on reports using a simple, intuitive interface. Each data object is presented in a way that clearly shows its relationship to joined data.

You must first enable the Data Explorer feature before you can perform these steps.

To create a report using Data Explorer:

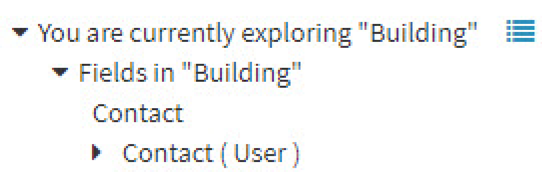
1. Expand the Reporting menu and click **Explore My Data**. Your data choices display in a tree format, to make it easy to distinguish the parent-child relationship between tables and fields.
2. Do one of the following to select tables, data objects, and fields:
   - **Browse:** Click on an item in the Your Data tree. This tree contains all Talent Management data objects and tables accessible to your role.
     - **Suggested Favorites:** A list of commonly used tables and fields, organized by module, to get started creating your report.
     - **Advanced:** Links to additional data, including **Most Referenced Objects**, **Custom Data Objects**, **Standard Data Objects**, and **All Tables**.
       - **Most Referenced Objects:** Contains data from 50 of the most popular tables, organized by module. The term popular here indicates how many other tables link to a given table's primary key. For example, the primary key, Candidate ID, is referenced in many other Talent Management tables, which indicates the Candidate object is high in popularity.
       - **Custom Data Objects:** Objects created by you, as well as objects made public by other creators.
       - **Standard Data Objects:** Custom data objects used to build Talent Management standard reports. These are not created by users, and cannot be edited. They are accessible if enabled (**Administration » Settings » Report Creation » Enable Standard Data Objects**). Note that this enables all standard data objects for all Reporting Tool users.
       - **All Tables:** This is a list of every MySQL table imported from Talent Management, all in one place.
   - **Search:**Use the **Search** field at the top of the screen to search for fields, tables, and data objects. Enter at least three characters of a name or keyword for which to search. Results are returned as soon as you stop typing, and will recalculate if you continue typing. Search results will include data objects and tables, as well as fields. For Data objects and tables, click on an item to explore or browse the content for possible inclusion on your report. For fields, click the field to expand the Field Actions, then click **Add this field to my report** to add the field to the Report pane at the bottom of the screen. Continue to step 4.
3. Click the arrow to expand one of the following areas to find the items you want to add to your report.

   > **Note:** It may help to consider how the item you are searching for relates to other data in the object/table you select. For example, if you are exploring the Class table, looking for student information, consider if the Class table would have many student records? If

Yes, you search in **Other Items That Are Linked to the Object/Table**. If No, search in **Fields**.

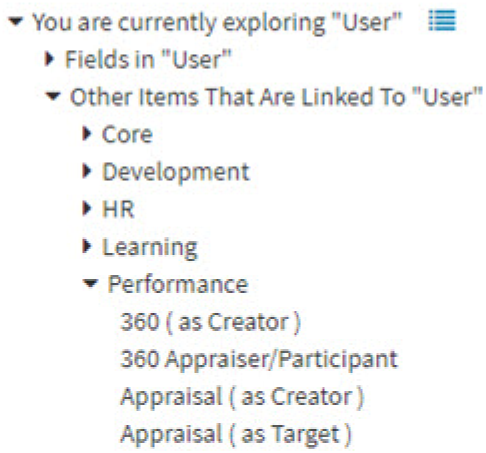
- **Fields in the Object/Table:** Browse in **Fields** for items with Many to One relationships with the selected Object/Table, if what you are looking for has only a single instance in the selected Object/Table. For example, if you are looking for information on a class that an individual student is taking in the **Class Student** table, you know that there are many student records, but *only a single* class in the whole table.

  Note: The Fields folder contains sub-folders that indicate a join, which when clicked, allows access to the data in the joined table. Exploring these fields is useful when a field in the first table is numeric, but you want readable text on your report. In the screen shot below, **Contact (User)**, indicates that **Contact** is the field name in the initial **Building** table, and **User** is the name of the table being joined. When you click on one of these sub-folders, you initiate the join. Essentially, you ask the Reporting Tool to join the **User** table to see more details about your **Building**'s **Contact**.

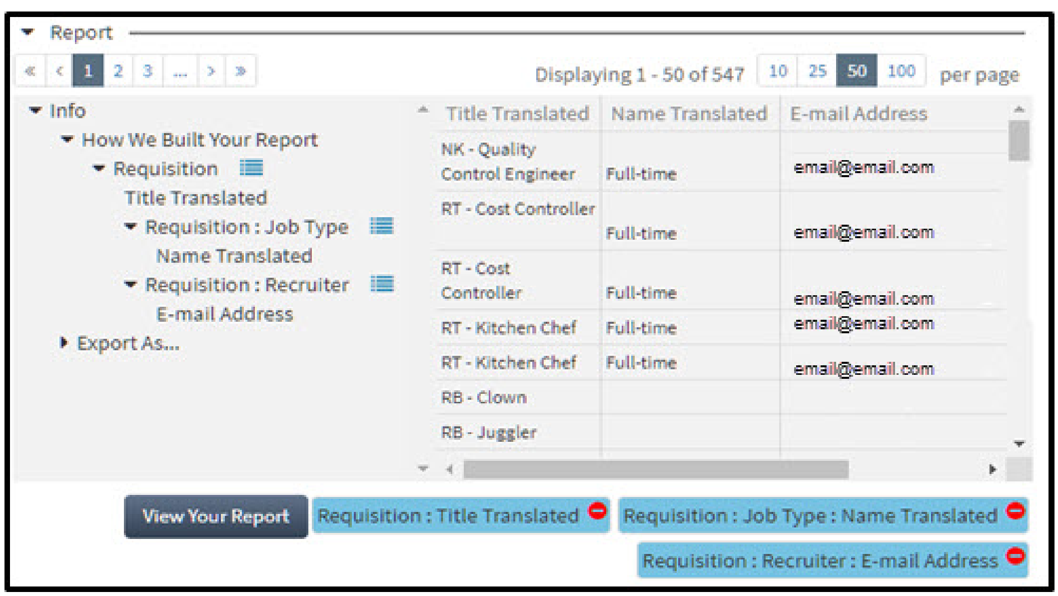
  

- **Other Items That Are Linked to the Object/Table:** Browse in **Other Items That Are Linked** for items with One to Many relationships with the selected Object/Table, in situations where what you are looking for has multiple instances in the selected Object/Table. For example, if you are looking in the **Class** table for student information, you know there will be *many* student records, so you search in the **Other Items That Are Linked** folders.

  Note: The **Other Items That Are Linked to** folder contains some items that when clicked will create a relation between the table you are exploring and the secondary table. In this example below, if you click Appraisal (as Creator), the Appraisal table opens in the Your Data pane, with a relation chain between the User table and the Appraisal table.



4. When you find a field you want to add to your report, click the field name.
   The Field Actions area expands to display the Column Title and a link to add the field to the Cart.
5. In the **Field Actions** area, if desired, modify the name of the column, by typing a new name in the **Column Title** field. To add the field as a column on the report, click **Add this field to my report**.
   This adds the field to your Cart at the bottom of the screen, below the Report pane.
   Columns can be removed from the report by clicking the Remove icon .
6. If there is at least one column in your Cart, the Cart will contain a **View Your Report** button. Click **View Your Report** to build the report in the Report pane, using the selected columns.
   The first column in the Report pane, titled **Info**, displays all included data as a tree.



7. Expand the **Info** tree to see how the application assembled your report.

8. To add additional fields from the same table, navigate the info tree and quickly jump back to that same relation chain.
9. Sort columns, if desired, in the Report pane. Sorting is performed via a 3-way clickable toggle; *Ascending » Descending » Off*. When a column sorting is selected, it moves to the top of the sorting list, overriding other sorting options.
10. When you are satisfied with your report, click **Export As** in the Info tree and select one of the export options (Excel, CSV, Adobe Acrobat, HTML, Advanced Report Wizard, or MySQL Query). Selecting **Advanced Report Wizard** sends Data Explorer's query to the Report Wizard in a new tab. From there you may save your report with filters, formatted columns, and other Report Wizard features. This is useful for testing.
    After you export your report, you can no longer modify it in Data Explorer. If you export to the Advanced Report Wizard, and chose to save it in that tool, then that report will display on the Reports Management screen, along with all other reports you have created.

Create Reports with Report Wizard

Use up to 35 words to describe this conceptual topic. Write complete sentences.

This is the start of your concept.

Step 1: Select the Category of Report

When creating a report, you can use a pre-defined category or create a new report category.

Create a Report Using a Pre-Defined Category

You can create a report using one of the several reporting categories set for each Deltek Talent module.

To create a report using a pre-defined category:

1. Select the report category.
   There are several reporting categories per module from which to choose. Here are some examples:

Module	Category
Recruiting	Applicant and Candidate Activity: This category allows you to generate a report on a variety of applicant and candidate activities, including time to hire, disposition details, diversity information, and more.
	Requisition Activity: This category allows you to generate a report on a variety of requisition details using this option. This includes applicant and candidate activity, statistics, and more.
	Offers: This category allows you to generate reports on a variety of information regarding offers, including approval details and benefits information.

Module	Category
Development	Career Plans & Activity: This category allows you to generate a report on employee 9-box placement, career plans, risk of loss, and more.
Performance	Appraisals: This category allows you to generate a report on appraisal details, employee scores, and a variety of appraisal activities.
	Goals: This category allows you to generate a report on goal details and activity, as well as progress by employees.
	360s: This category allows you to generate reports on 360 appraisals.
Core	Development Plans: This category allows you to generate a report on employee development plans and more.
Learning	Certifications: This category allows you to generate a report on certification details and activity, including expiration information.
	Classes: This category allows you to generate a report on a variety of class details and student activity, including assignments and test results.
	Courses: This category allows you to generate a report on a variety of course details and activity, student participation, and more.
	Curricula: This category allows you to generate a report on a variety of curriculum details and activity, student progress, and more.
	Class Evaluations: This category allows you to generate reports on class evaluation results.
	Tests: This category allows you to generate reports on student test results.

Note: All modules will appear on your screen even if they are not installed in your company's Talent Management system.

2. Click **Next**.

Create a Report Using a New Category

You can create a new category for your report.

To create an empty report, rather than a report based on a pre-defined category:

1. Select **Choose this option to create a new empty report.**
2. Click **Next**.

Step 2: Build a Report

In this step of Report Wizard, you build your report by adding columns based on your selected data sources.

The first course of action in this step depends on the option you selected in Step 1, as follows:

- If you started your report by selecting **Choose this option to create a new empty report**, you are immediately prompted to select data source categories for your report. See Add Data Sources for instructions.
- If you started your report by selecting a pre-defined report category, you are ready to add columns to your report based on the category you selected. See Add Columns for instructions.

> **Note:** When you access Step 2 of the Report Wizard, a short series of tutorial pop-up boxes display to define user interface features and guide you through the initial steps of creating a report. To hide the tour, click **Do not show again** on any of the tutorial boxes. If you want to see it again at any point in the future, click the **View Tour** button at the top right-hand side of the screen.

Add Data Sources

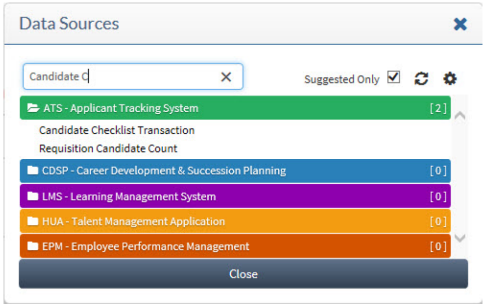
You add data sources if in Step 1 of the Report Wizard you selected **Choose this option to create a new empty report**.

In Step 2, Report Wizard immediately prompts you to select the data sources that you will use to build your report.

To select data sources:

1. In the Data Sources dialog box, click the desired module to expand the list of data sources.
   The data objects that belong to the selected module display.
2. Locate the data source you want to add by using one of the following methods:
   - Scroll through the list to locate the data source.
   - Enter a search term in the empty **Keyword** field at the top of the dialog box.

   As you type in the **Keyword** field, the Data Source list automatically displays all matches. Additionally, the heading for each data source category displays the number of matches for that category.



3. Select the data source.

> **Note:** When you select a data source, its name and description display in the bottom of the Data Sources dialog box next to the **Add to Report** and **Preview** buttons. Neither the data source description nor the two buttons display until you select a data source.

   To view the proposed table joining and see how the data objects will affect the report, click **Preview**. The preview window displays the first ten rows of the data source. If you want to add the data source, click **Add to Report**.

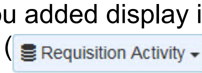
4. Repeat steps 2 and 3 to add more data sources to your report.

   If you add multiple data sources that require a join, you may receive a message asking you to review the join relationship. After you click **OK**, the Add Data Sources dialog box displays, where you can do the following:

5. If necessary, revise the join relationship.
6. Click **Save**.
7. Click **Add to Report** to return the Data Sources dialog box.

   To learn more about joins, see Appendix B: Join Selected Data Objects.

8. When you are finished adding data sources, click **Close** in the Data Source dialog box.

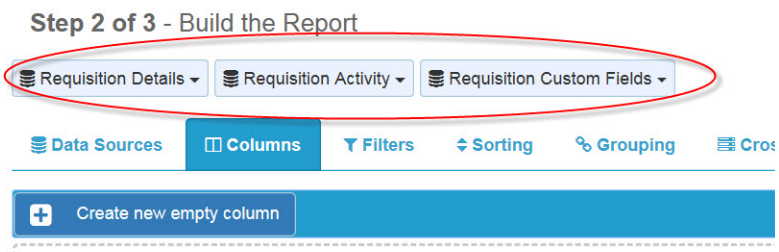
   The data sources (also referred to as “buckets”) that you added display in the table on the Data Sources tab, and they also display as buttons ( , for example) above the tabs.

> **Note:** If you closed the Data Sources dialog box and later need to add another data source, click the **Show data source catalog** button that is located on the Data Sources tab.\

9. Click the Columns tab and follow steps described in the Add Columns topic.

Add Columns

Add columns to your report based on the buckets that display above the Columns tab, as exemplified in the following image:



When you click a bucket, the field names it contains display directly beneath, as exemplified in the following image:

The fields within the buckets are used to populate the columns of your report. This process is described in the procedure for building your report that follows below.

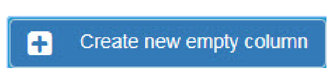
Build the Report

Select data sources for your report and format its appearance.

To build your report:

1. Select the bucket that contains the field you want to add to your report.
2. Click the field name and drag it into the workspace of the Columns tab.
3. Repeat steps 1 and 2 until you have added all the fields required to build your report.

   As you add fields, Report Wizard provides you with a preview of the content in the report preview table. The field name you selected also serves as the column heading.

   You can also create a new, unpopulated, column. To create a new column:
4. In the Columns tab, click 
 .
5. In the Expression Editor dialog box, drag the field you want for your column into the Workspace pane at right.
6. Click **Save**.

7. In the Column Name dialog box, enter a name for your column. The default is the original field name.
8. Click **OK**. The default position for your new column is on the left side of the report preview table.
9. Customize the columns in your report.
10. To sort the columns in the order that you want them to appear, click the column heading and drag it to the desired position.
11. Each column heading has a gear icon that contains the following drop-down list options.

Option	Descripiton
Rename Column	Select this to rename the column.
Add Filter	Select this to create a display filter for the column. For additional information, see Add Filters. There are two types of filters: Prompted: This filter type allows you to select and refine what they want to see in the report. Static: This filter type displays only the information that falls within the pre-selected filter option. For example, if you want to create a report that displayed only open requisitions, then you can use the static filter by selecting Select List = Open status as the static filter criteria. You can use a combination of Prompted and Static filters.
Group	Select this to group similar data columns together. You can also select the Roll Up check box, to group together similar data within the column and display them as a total for that grouped column.
Sorting	Select this to set Ascending or Descending as the sort order for the column. For additional information, see Sort Columns.
Add Average	Select this to create a split section above the workspace between Grouped Columns and Averaged Columns and display a new row at the bottom of the report with the averaged output.
Add Total	Select this option to add a total for the column. Add Total can be combined with column averaging. In this case, the Total row displays below the Average row. As with averaging, only numeric values are calculated. Non-numeric contents of column cells are treated as '0'.

Option	Descripiton
	If Totals are included in the report, the menu item label changes to Remove Total. Click Remove Total to delete the Total row from the report.
Delete	Select this to remove the column from the workspace.

12. Click **Next**.

Add Filters

You can select fields to filter your report's output.

To add a field as a filter:

1. Select **Add Filter** on the column heading or click the Filters tab and drag the desired field into the appropriate filter type (**Prompted** or **Static**).
2. Select **Match All** or **Match Any** if you want to group the results.
   The following options are available when you add fields as a filter:
   - **Select List**: This filter type allows you to select filter criteria from a drop-down list.
   - **Keyword**: This filter type allows you to enter keywords as the filter criteria.
   - **Date Picker**: This filter type allows you to enter a date or date range as the filter criteria.
3. Select an operator from the drop-down list. Depending on the filter type that you selected, the following options become available

Operator	Options
Select List	▪ **One of / Not One of**: Matches a value in a list (or not)
Date Picker	▪ **Equal to / Not Equal To**: Checks if the value is equal or not ▪ **Greater than** ▪ **Greater than or Equal to** ▪ **Less than** ▪ **Less than or Equal to**
Keyword	▪ **Equal to / Not Equal To**: Checks if the value is equal or not ▪ Greater than ▪ **Greater than or Equal to** ▪ **Less than**

Operator	Options
	▪ **Less than or Equal to** ▪ **Like**: Will return results that exactly match what is entered ▪ **Not Like**: Will return results that do not match what is entered

Use the User ID as Filter Criteria

When running reports, you can restrict the reports users receive or generate to data corresponding to their own user ID.

To do so, select one of the following user references fields as filters and as column categories:

- **User ID:** The Remote User ID of the user who receives or views a report (for Local users, this field will contain an empty value as Local users are not given User IDs).
- **User Name:** The actual name of the current user, which displays in "Last Name, First Name" format.
- **User Email:** The email address of the user.
- **User Login:** The login name of the user.

  Additionally, you can use identifying recipient data such as **User ID** and **Email Address** as filter types. When used as prompted, available recipient ID options appear as dropdown selections.

Sort Columns

To set a sort order, you can either click the **Sorting** tab or from the icon on the column heading.

To add a column to directly into the Sorting tab, click the bucket and drag the column that you what to sort.

If you select sorting options from the column heading, this automatically populates that column in the Sorting tab.

Select whether the default sort order is **Ascending** or **Descending**. Each column can have a different sorting option.

Add Crosstab Reports

You can extend the display of reports by adding columns that aggregate the display of data from other selected columns.

To add a crosstab or pivot table to your basic report:

1. Click the Crosstab tab.
2. Select the **Enable Crosstab** check box.

This allows you to “flatten” or extend the display of reports by adding new columns that break down data contained in other selected columns.

Prompt Check Box

Select the **Prompt** check box on the Report Wizard Grouping tab to enable the ability to group your report by a designated field contained within the report.

The **Prompt** check box enables users to send the same report to various stakeholders, but filtered with different groupings tailored for diverse recipients. Fields or columns selected for grouping are called 'prompted.'

When **Prompt** is selected, users can:

- Prompt multiple groupings as appropriate.
- Edit the grouping while viewing the report.
- Create reports with undefined groupings, allowing the user to set them when running the report.

To group a report around a specific column:

1. Select the **Prompt** check box.
2. Set the display order for the column's contents. Select either *Ascending (A-Z)* or *Descending (Z-A)* from the first drop-down list.
3. From the second drop-down list, select the column around which the report will be grouped.

   The drop-down list displays only those fields that are valid for prompting.
4. Click **Finish**.

Save and Publish the Report

You can use the Details tab to format, preview, and export the report.

To finish the the report:

1. On the Details Tab, enter a **Name** for the report and a **Description**.
2. From the **Module** drop-down list, select the module to which the report belongs. A module is selected by default based on the data objects contained in the report.
3. Select the **Public** check box if you want the report to be visible to other users.

   > **Note:** Beneath the **Public** check box, a **Save as New** check box may also display if you started by modifying an existing report instead of creating a new one. Select **Save as New** to save it as a new report instead of overwriting the existing one.
4. From the **Style** drop-down list, select a design format for the report. A preview of the selected style displays below the **Style** drop-down list.
5. > **Note:** The **Export** button is enabled only for reports containing visible columns and for reports populated with sufficient data. Columns marked as hidden will not be exported.

> If you started by editing an existing report, modifications are immediately reflected in the report designated for export.

Click **Export** to select the export format.

6. Click **Finish.**
   You can schedule distribution of your report by selecting **Schedule** from the **Actions** drop-down menu on the Reports Management screen.

Data Object Builder

The Reporting Tool gives you unprecedented access to the data that you have stored in your Talent Management Solutions.

You can create your own data objects to generate granular information for your reports.

The Data Object Builder allows you to combine data structures into usable custom reporting data objects. Although the Reporting Tool is delivered with pre-built data objects, you can create new data objects to get the most exact and specific information for your reports.

Contents of the Data Object Builder

The Data Object Builder screen has three distinct areas: Data Object Tree, Tab bar, and Working Area.

Three areas of the Data Object Builder:

- Data Object Tree
- Tab Bar
- Working Area

Data Object Tree

This expandable listing displays the available data objects.

You can view data tables for each system that you have deployed and integrated. As an Admin group member, you can view data tables in the following modes:

- **Basic:** This view displays custom data objects. You can create additional custom data objects based on the tables viewed in Basic mode.
- **Advanced:** This view displays data objects by **Type**, **Root Data Objects**, and **Tables**. You can create new Root Data Objects as well as Custom Data Objects in the Advanced mode view.

  The Data Object Tree lists all the data objects and tables in the database. They are separated by module: **ATS**, **EPM**, **LMS**, **CDSP**, and **HUA**. The number in brackets to the right of each module indicates how many tables are in that module. Click the module section to expand it.

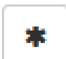
  The HUA module contains information that is shared among the other modules, such as employee (user) data, approval chains, and calendar events.

You can search the tables by entering keywords. Click the **Gear** icon to select the search area: for example: table name, description or database table name.

> **Note:** All modules will appear on your screen even if they are not in use or disabled in your company's Enterprise system.

Actions in the Data Object Screen

The following action icons appear in this area depending on the options that you selected.

Icon	Description
	**New Data Object**: Select this to clear the work area in order to create a new data object from existing data objects in the tree.
	**Open Data Object**: Select this to open an existing data object from the tree by clearing any existing data object from the workspace and adding the selected data object in its place.
	**Add Data Object/Table**: Select this to add the selected data object to the work area. You can add multiple data objects to the workspace to create composite data objects with the specific information for your reports. You can also drag and drop your selected data objects into the workspace.
	**Delete Data Object**: Select this to delete an existing data object after prompting the user for confirmation. Only the user who created the data object will see this icon and be able to delete that object.

Tab Bar

This area of the Data Object Builder is displayed across the top of the screen with, graphical and SQL options for viewing the data objects you'll be working with.

The **Save** or **Save as…** buttons allow you to name and save the new data object or to save the edited data object as a new object while still retaining a copy of the original.

Work Area

This area of the Data Object Builder displays the opened data objects giving you all the access to create new objects or fine tune the existing object to make your reports relevant to your needs without any additional customization.

The Work Area displays all the options you need for working with the Graphical View or the SQL Editor, depending on the tab you've chosen.

To enlarge the workspace, click the  icon.

Work Area: Graphical View

The Graphical View option is the default format and displays a graphical representation of the data objects in the work area.

If you are not familiar with SQL query, the graphical representation lets you access the same data in a clearly organized and user friendly display. You can still create complex data objects without writing any SQL code.

To open a data object table in the work area, click the **Object Name** from the listing on the left, then drag and drop into the work area.

The data object name appears at the top of the block with its alias displayed underneath. The SQL query uses the alias for multiple instances of the same data object. Aliases are generated automatically when the object is created. To change the alias, click it and enter a new alias in the pop-up window.

Actions in the Graphical View

You can select columns to view and delete data objects in the work area.

Icon	Description
	Click this icon to invert the listed selected/unselected columns. If a column is marked as selected and you click this icon, the column will be unselected. If a column is selected, then that data column will be included in the data object result.
	Click this icon to delete the data object from the work area

Rename Data Columns in the Graphical View

You can assign descriptive names to columns to help report builders find the objects they need.

To rename a data column:

Select the column and click .

Always remember to assign descriptive names to data objects to make it easier for other report builders to find the data objects that they need.

Graphical View: Toolbar

In Graphical View, the toolbar above the workspace gives you additional functionality to create joins and conditions.

Join Type

By default, the tables are joined using an **Inner** join. When two or more tables are joined, additional **Join Type** options become available, as well as the ability to enter **Query Conditions**.

The **Join Type** field displays the type of join used and allows you to select another type to return different result sets.

Query Conditions

This field lets you create conditions for the current data object in SQL format, except the **WHERE** keyword. Click **…** next to the field to display a visual condition editor. This lets even users with limited knowledge of SQL specify conditions without writing any SQL code.

Change Join Types

You can change the join type by selecting the new type from a drop-down list.

To change the join type:

1. Select the column from the first table, and while holding the **CTRL** key on your keyboard, select the joined column from the other data table(s).
2. After you have selected all the columns, select the new **Join Type** from the drop-down list
3. Click .
4. To remove the join between columns, select the column in each table, and click .

Graphical View: SQL Editor Tab

View the SQL query for the data object that you are creating or editing.

This tab lets advanced users bypass the graphical display to fine-tune the data object result set. This view also has a **Preview** button, which displays the first few rows of the data object result set.

Graphical View: Properties Tab

After you have created the data object, assign it a relevant name, select the appropriate module classification, and add a description to help other users in your company identify the content of the object.

Click **Save**. The system will add the data object to the data tree under the module name you selected in **Properties**.

You can also use the **Save as** button to create a copy that you can change or edit. Also, if you opened and modified a data object, you can click **Save as**, to create a new data object instead of overwriting the original object.

Create Objects Using the Data Object Builder

You can create objects by dragging and dropping the tables you want to include, add joins if needed, and add details on the Properties tab. You can also fine-tune the data using the SQL Editor tab.

To create data objects using the Data Object Builder:

1. Select the tables from the data object tree and drag them to the work area.

2. A validation message displays to notify you if tables need to be joined.

   There are two way to join tables:

   - Click the column from the first table, then drag and drop to the corresponding column on the second table. The columns are automatically be joined with the default **Join Type**; or
   - Select the column in each table, select a different **Join Type**, if desired, and click .
3. Click to remove the join between columns, if necessary.
4. Select the check box next to the columns from each table that you want to use for the new data object.

   Clear the check box next to the columns that you do not want to use.
5. You can click the **SQL Editor** tab at any time during the data object creation process, to view the SQL expression.

   Click the **Preview** button to see the data the report pulls.
6. Click the **Properties** tab and complete the following fields:
   - **Name**
   - **Module**
   - **Description**
7. Click **Save**.
   The new data object will appear on the data object tree to the left of the work area.

Data Explorer

The Data Explorer provides a simple, intuitive way to navigate the relationships between our data tables and to search and use data objects on reports, without the need for a robust understanding of SQL.

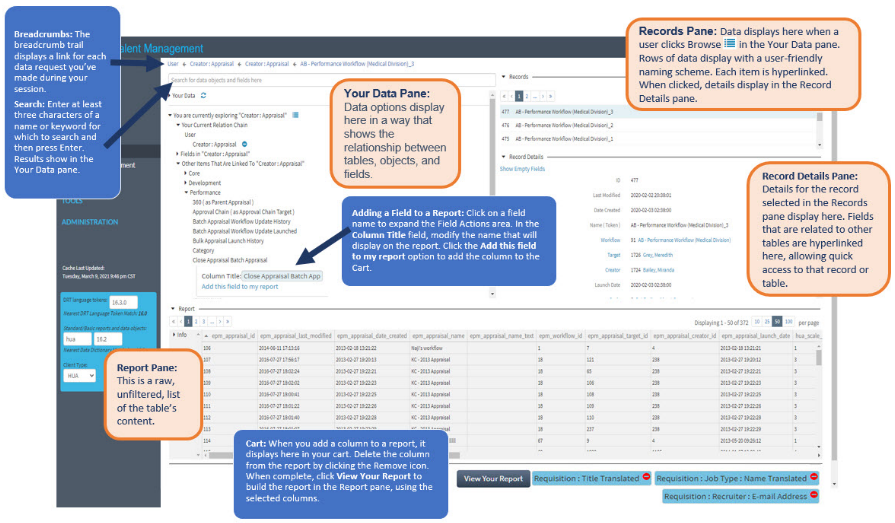
To make building reports and analyzing data intuitive, each data object is presented in a way that clearly shows its relationship to joined data. Clients can use Data Explorer to analyze data, to export simple CSV files or PDFs, or to export data and create more complex reports.

The Data Explorer must first be enabled before use.

Data Explorer Screen

The Data Explorer screen is split into four panes, left, right (2), and bottom. All panes are linked, and all panes display data from the same table. If you click a hyperlink in the Record Details pane, which links to a field in a related table, all panes will refresh to that table.

Contents

Field	Description
Screenshot	
Your Data Pane	The Your Data pane displays your data options (database, data objects, tables, and field names) in a tree format, to make it easy to distinguish the parent-child relationship between tables and fields. Click the Browse icon next to a table to view the table rows in the Records pane. Click the Discard icon to view an object directly and discard the relation chain created between the object and the parent table.
Records Pane	Data displays here when a user clicks Browse in the Your Data pane, or the Additional Data Linked To This Record tree in the Record Details pane. Rows of data display in the Records pane with a user-friendly naming scheme. Each item is hyperlinked. When clicked, details display in the Record Details pane. Click the **View All Columns** icon in the upper right of the pane to display the raw data for this record in the Report pane. When the filtered view is on, the record name displays in the upper right of the Records pane, highlighted in blue Requisition: 572, and the Your Data pane is updated, based on the selected record. Click the Remove icon to exit filtered view.

Field	Description
Record Details Pane	Details for the record selected in the Records pane display here. Fields that are related to other tables are hyperlinked here, allowing quick access to that record or table. After loading an individual record in the **Records** pane, if you see a Loading icon, at the bottom of the pane, Data Explorer is requesting additional data related to the current record. If related data is found, it displays in the Additional Data Linked To This Record navigation tree, at the bottom of the pane. This tree lists related tables, grouped by module, and goes a level deeper and lists links to other rows of data that are directly related to the record you are currently viewing. For example, if you are viewing a specific Requisition record, the Additional Data navigation tree lists data related to the requisition, such as the candidates and the transactions. Click an item here to display details for a specific record in the Records pane, and to enable a filtered view showing only the items that are directly related to that selected record. When the filtered view is on, the record name displays in the upper right of the Records pane, highlighted in blue . This filtered view applies to the raw data that displays in the Report pane when you click the View All Columns icon .
Report Pane	This is a raw, unfiltered, list of the table's content. To export the data, click **Info » Export as..** in the first column to display a list of export options such as Excel, CSV, and Adobe Acrobat. You can also export the data as a MySQL Query.
Breadcrumbs	The breadcrumb trail displays across the top of the screen. The breadcrumb trail includes a link for each data request you've made during your session.
Search	Use the Search field at the top of the screen to find data to analyze, or include on a report. Enter at least three characters of a name or keyword for which to search and then press the **Enter** key. Results show in the Your Data pane.
Fields	The data displayed in the Your Data pane is tables and fields. When you click a field name, the Field Actions area expands. The Field Actions area contains a **Column Title** and a link to add the field to your report. Edit the name in the **Column Title** field to change how it displays on your report. Click the **Add this field to my report** option to add it to your Cart, which selects it for inclusion when you view the report.
Cart	When you add a column to a report, it displays in your Cart, below the Report pane. Delete the column from the report by clicking the Remove icon. When finished adding columns for a report, click **View Your Report** to build the report in the Report pane, using the selected columns.
Hover	Use your mouse to hover over an object and display details such as the object's full name, the MySQL table name, if one exists, the object description, and the key fields used to join the object to other objects.

Enable the Data Explorer

An Administrator must enable the Data Explorer feature for the desired groups.

To enable the Data Explorer:

1. On the Reporting Tool navigation pane, click **Administration » Groups**.
2. Locate the group and click **Edit** in the Actions menu.
3. On the Group Management screen, click the Privileges tab.
4. Click **Data** to expand the section.
5. Check **Data Explorer**.
6. Click **Save**.
   The **Explore My Data** option displays in the Navigation Pane for the selected group. If the user enabling this feature belongs to the selected group, the option displays after the next browser page refresh.

Search Feature for Data Objects and Fields

Use the Search field at the top of the Data Explorer screen to do a quick search for fields, tables, and data objects.

You search by entering at least three characters of a name or keyword in the Search field. Here are some tips to help tailor your search.

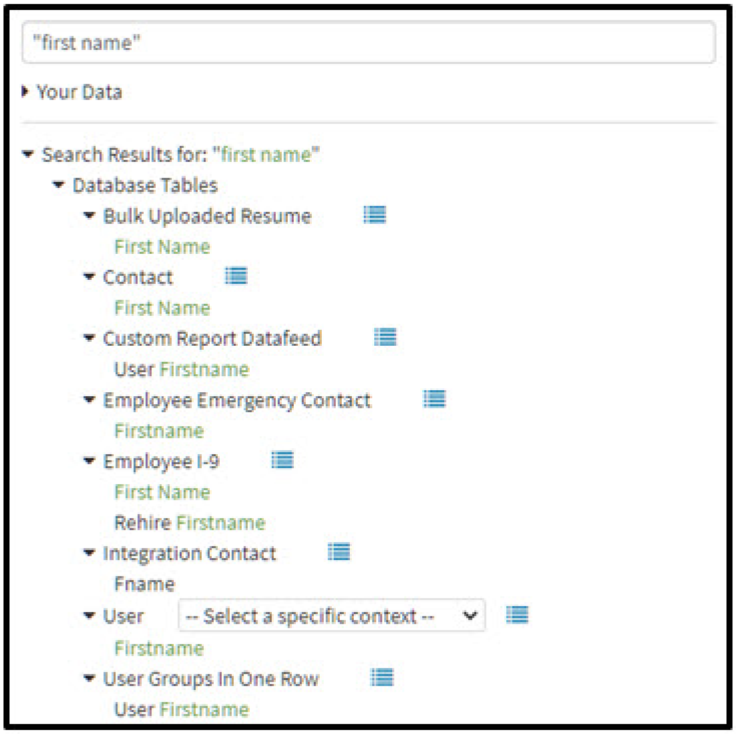
- Include specific phrases inside single or double quotation marks. For example, "hiring manager" or 'requisition title'.
- Use simple Unix/DOS commands such as ? to match any single character entered in the search, or * to match 0 or more continuous characters within a word. For example, Requi*.
- The search initiates after typing pauses for several seconds. Finish typing or change your search input, if desired, and the search results will update.
- Search uses Match All logic, meaning the more terms you enter, the fewer results you are likely to see.

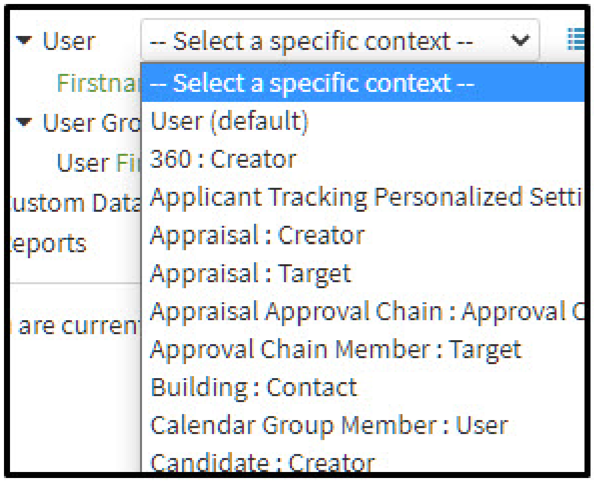
> **Note:** Search is looking for literal matches of the text you enter. It does not factor in plurals. For example, if you type "requisitions", the Reporting Tool Search doesn't know you mean to return all requisition items. If you're not positive how something is spelled in a Talent Management database, use partial words, such as " st name" or use the wildcards ? or * . For example, if you're not sure if the term used is curricula or curriculum, search for " curricul * location".

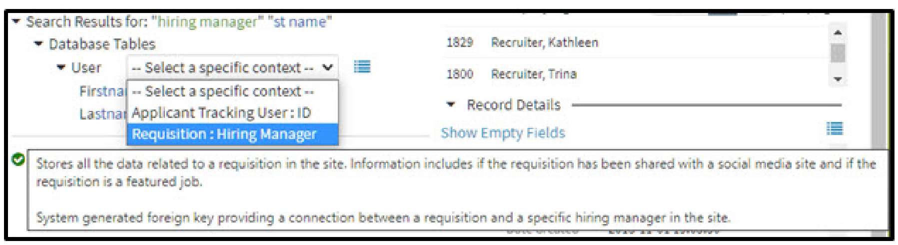
Sample Search for Data Objects and Fields

This sample demonstrates a best practice of using specific phrases.

Sample Search Using Term "first name"

Field	Description
Screen shot of results returned for "first name" entered in Search field.	
	"first name" is a common phrase found in many tables so many results are returned. There are more than 900 tables in the Talent Management database, with many fields in each one. When searching, use more specific phrases or keywords to narrow results. Notice the User result for our search has a **Select a specific context** drop-down. This list contains non-standard ways that the User object could join to other items. In the case of the User object, non-standard means any join that does not use hua_user_id.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Select a specific context Drop-Down</td><td>


Notice the User result for our "first name" search has a Select a specific context drop-down. This list contains non-standard ways that the User object could join to other items. In the case of the User object, non-standard means any join that does not use hua_user_id. The "first name" search results in many options. When you use a more specific search phrase, you narrow the options here as well.</td></tr>
<tr><td>Narrow Results With Specific Search Phrases and Keywords</td><td>


The more specific your search phrase, the more narrow, and useful, your results. If we refine the search to narrow our results by entering “hiring manager” and “st name” in the Search field, the search results include both Firstname and Lastname in the User table, and because we added “hiring manager”, the User drop-down now only contains two possible contexts for us to choose from to select a specific context.</td></tr>
</table>

Create Reports with Data Explorer

When you use Data Explorer to create reports you don't need a robust understanding of SQL. Navigate the relationships between our data tables, and search and use data objects on reports using a simple, intuitive interface. Each data object is presented in a way that clearly shows its relationship to joined data.

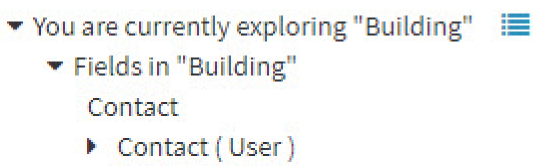
You must first enable the Data Explorer feature before you can perform these steps.

To create a report using Data Explorer:

1. Expand the Reporting menu and click **Explore My Data**. Your data choices display in a tree format, to make it easy to distinguish the parent-child relationship between tables and fields.
2. Do one of the following to select tables, data objects, and fields:
    - **Browse:** Click on an item in the Your Data tree. This tree contains all Talent Management data objects and tables accessible to your role.
        - **Suggested Favorites:** A list of commonly used tables and fields, organized by module, to get started creating your report.
        - **Advanced:** Links to additional data, including **Most Referenced Objects**, **Custom Data Objects**, **Standard Data Objects**, and **All Tables**.
            - **Most Referenced Objects:** Contains data from 50 of the most popular tables, organized by module. The term popular here indicates how many other tables link to a given table's primary key. For example, the primary key, Candidate ID, is referenced in many other Talent Management tables, which indicates the Candidate object is high in popularity.
            - **Custom Data Objects:** Objects created by you, as well as objects made public by other creators.
            - **Standard Data Objects:** Custom data objects used to build Talent Management standard reports. These are not created by users, and cannot be edited. They are accessible if enabled (**Administration » Settings » Report Creation » Enable Standard Data Objects**). Note that this enables all standard data objects for all Reporting Tool users.
            - **All Tables:** This is a list of every MySQL table imported from Talent Management, all in one place.
    - **Search:**Use the **Search** field at the top of the screen to search for fields, tables, and data objects. Enter at least three characters of a name or keyword for which to search. Results are returned as soon as you stop typing, and will recalculate if you continue typing. Search results will include data objects and tables, as well as fields. For Data objects and tables, click on an item to explore or browse the content for possible inclusion on your report. For fields, click the field to expand the Field Actions, then click **Add this field to my report** to add the field to the Report pane at the bottom of the screen. Continue to step 4.
3. Click the arrow to expand one of the following areas to find the items you want to add to your report.

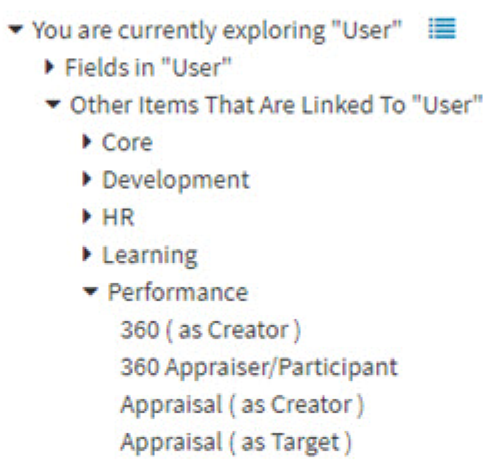
    > **Note:** It may help to consider how the item you are searching for relates to other data in the object/table you select. For example, if you are exploring the Class table, looking for student information, consider if the Class table would have many student records? If Yes, you search in **Other Items That Are Linked to the Object/Table**. If No, search in **Fields**.

    - **Fields in the Object/Table:** Browse in **Fields** for items with Many to One relationships with the selected Object/Table, if what you are looking for has only a single instance in the selected Object/Table. For example, if you are looking for information on a class that an individual student is taking in the **Class Student** table, you know that there are many student records, but *only a single* class in the whole table.

> **Note:** The Fields folder contains sub-folders that indicate a join, which when clicked, allows access to the data in the joined table. Exploring these fields is useful when a field in the first table is numeric, but you want readable text on your report. In the screen shot below, **Contact (User)**, indicates that **Contact** is the field name in the initial **Building** table, and **User** is the name of the table being joined. When you click on one of these sub-folders, you initiate the join. Essentially, you ask the Reporting Tool to join the **User** table to see more details about your **Building**'s **Contact**.
>
> 
>

- **Other Items That Are Linked to the Object/Table:** Browse in **Other Items That Are Linked** for items with One to Many relationships with the selected Object/Table, in situations where what you are looking for has multiple instances in the selected Object/Table. For example, if you are looking in the **Class** table for student information, you know there will be *many* student records, so you search in the **Other Items That Are Linked** folders.

> **Note:** The **Other Items That Are Linked to** folder contains some items that when clicked will create a relation between the table you are exploring and the secondary table. In this example below, if you click Appraisal (as Creator), the Appraisal table opens in the Your Data pane, with a relation chain between the User table and the Appraisal table.

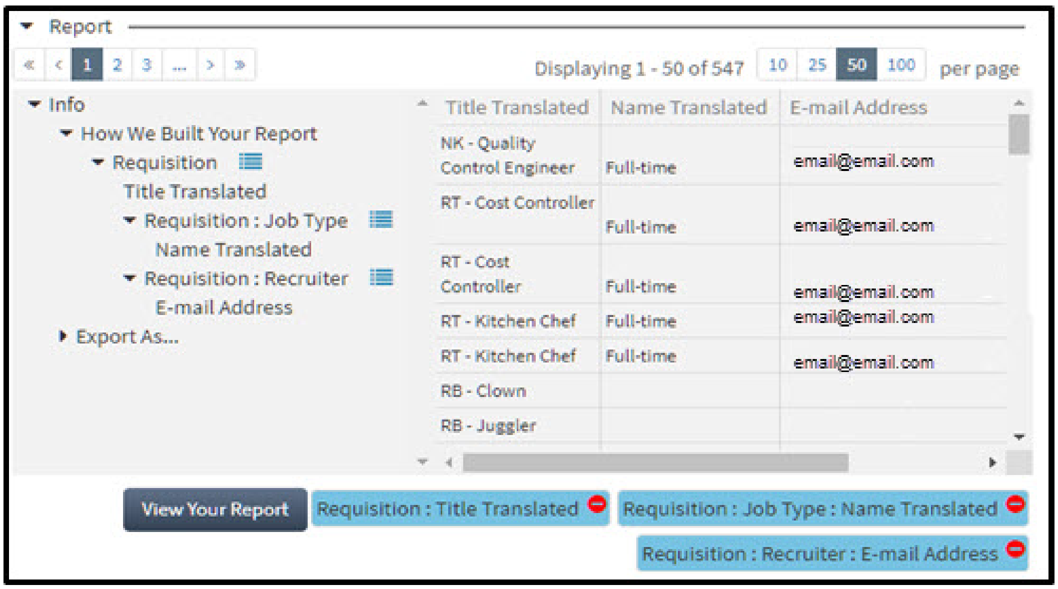


4. When you find a field you want to add to your report, click the field name.

The Field Actions area expands to display the Column Title and a link to add the field to the Cart.

5. In the **Field Actions** area, if desired, modify the name of the column, by typing a new name in the **Column Title** field. To add the field as a column on the report, click **Add this field to my report**.
   This adds the field to your Cart at the bottom of the screen, below the Report pane. Columns can be removed from the report by clicking the Remove icon .

6. If there is at least one column in your Cart, the Cart will contain a **View Your Report** button. Click **View Your Report** to build the report in the Report pane, using the selected columns.
   The first column in the Report pane, titled **Info**, displays all included data as a tree.



7. Expand the **Info** tree to see how the application assembled your report.

8. To add additional fields from the same table, navigate the info tree and quickly jump back to that same relation chain.

9. Sort columns, if desired, in the Report pane. Sorting is performed via a 3-way clickable toggle; *Ascending » Descending » Off*. When a column sorting is selected, it moves to the top of the sorting list, overriding other sorting options.

10. When you are satisfied with your report, click **Export As** in the Info tree and select one of the export options (Excel, CSV, Adobe Acrobat, HTML, Advanced Report Wizard, or MySQL Query). Selecting **Advanced Report Wizard** sends Data Explorer's query to the Report Wizard in a new tab. From there you may save your report with filters, formatted columns, and other Report Wizard features. This is useful for testing.
    After you export your report, you can no longer modify it in Data Explorer. If you export to the Advanced Report Wizard, and chose to save it in that tool, then that report will display on the Reports Management screen, along with all other reports you have created.

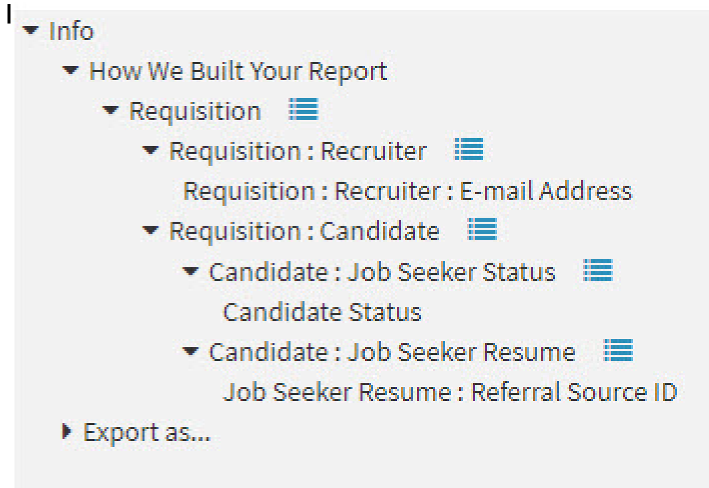
Learn By Creating a Sample Report

Understand Data Explorer report creating by creating a sample report.

(Optional) Enter the prerequisites here. This should be relatively brief. If you need to write extensive prereq info, create a reference topic for it and combine the topics using a small ditamap. Be sure to keep the first sentence in the <p> element.

To create a sample report:

1. On the Navigation Pane, click **Explore My Data**.
2. On the Data Explorer screen, click **Suggested Favorites** to expand options.
3. Click **Recruiting**.
4. Click **Requisition**.
5. Click **Fields in "Requisition"** to expand the list of available fields.
6. Click **Recruiter (User)**.
   The Requisition: Recruiter table loads in the Your Data pane.
7. Click **E-mail Address**.
   The Field Actions area displays the Column Title field and a link to add the field to the report.
8. Click **Add this field to my report**.
9. Return to the Your Data pane and click **Suggested Favorites » Recruiting » Candidate**.
10. In the Fields list, click**Job Seeker Status**.
11. Click **Name (Token)**.
    The **Field Actions** area displays the **Column Title** field and a link to add the field to the report.
12. In the **Column Title** field, type **Candidate Status** to change the name.
13. Click **Add this field to my report**.
14. In the Search field, type **"resume referral"**.
15. Click **Job Seeker Resume: Referral Source ID**.
16. Click **Add this field to my report** to add the field to your Cart, below the Report pane.
17. In the Cart, click **View Your Report**.
18. In the Report pane, click the Info tree and expand How We Built Your Report to examine the report structure determined by the Reporting Tool.



Things to Learn From This Sample

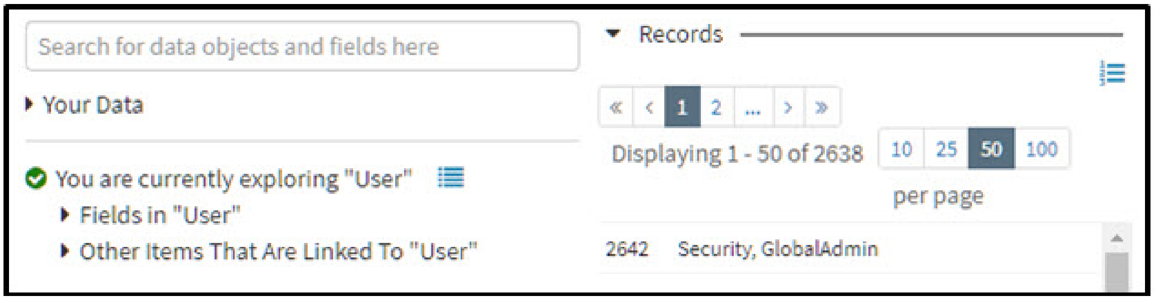
- The biggest takeaway is that Data Explorer can automatically help fill in missing information, without the need for you to spend time and energy planning.
- **Requisition** was deemed the most popular "root" item, so the Reporting Tool placed it at the top and it became the From portion of the report query.
- The **Requisition** object uses this chain to display the recruiter's email address.
- Regardless of how the Reporting Tool builds the report, **User** will remain linked to **Requisition** via the chain we built earlier.
- The column containing the candidate's status is in a chain that begins with **Candidate**.
- The data dictionary correctly identified a common relation between **Requisition** and **Candidate** and completes that chain by appending the column's chain to Requisition, which means this column's full chain is now Requisition » Candidate » Job Seeker Status.
- Our Referral Source column's chain begins with **Job Seeker Resume**.
- The Reporting Tool identifies a relation between **Resume** and **Candidate** and appends this column's chain, giving this new column a chain of Requisition » Candidate » Job Seeker Resume » Referral Source ID.

Learn By Understanding the Relation Chain

This topic explorers various objects to help you understand the Relation Chain. Understanding the Relation Chain can help as you use Data Explorer to create reports.

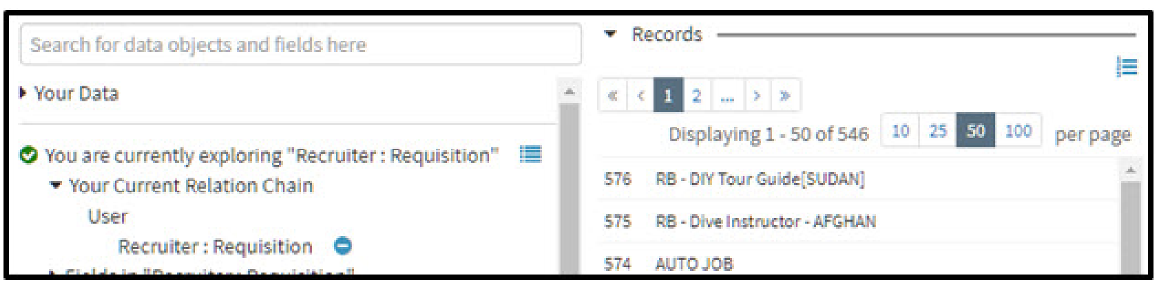
As you navigate through related objects, Data Explorer keeps track of this as a Relation Chain, a breadcrumb trail of each step. When you make your first selection you have just one link. When you make any relation, or join, you create a chain.
To better understand the Relation Chain. let's first explore the User object. We start with only one link, the User object, and no chain. If we click the Browse icon the total number of records is

indicated at the top of the Records pane. There are 2638 individuals. This is every user in the database.



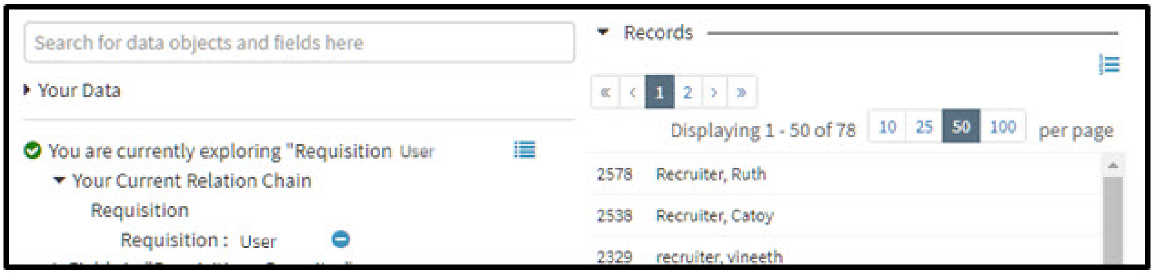
Now, let's look at the Requisition object, also with only one link, and no chain. If we click the Browse icon we see 547 items in the Records pane, representing every requisition in Talent Management.

Now, let's return to the User object, then navigate into the Other Items list and choose **Requisition (as Recruiter)**. When we click Requisition (as Recruiter), we ask the Reporting Tool to join the two tables and return only results with a recruiter assigned. We get the following:



There are only 546 requisitions available in the Records pane because Data Explorer internally applies your current relation chain, using an Inner join, to show only the requisitions that have a recruiter assigned.

To view this from another perspective, let's click the Requisition object, expand Fields, and drill into the Recruiter details. Now if we click on the User table as the relation, we do not see the 2638 users we saw earlier, we see only 78 users. This is because there are only 78 users in Talent Management that are assigned recruiters for any requisition. Effectively, this is a list of all active recruiters.



Returning to the Root of Your Relation Chain: When you see that you've navigated into a deep chain, realize that each join contains a set of criteria for relating it to your report, and you are in effect filtering your report on those additional joins. When you find yourself at the tail end of a deep chain you will see the Discard icon . Click this icon to discard the chain and return to the root of your chain.

Export Report Data

When you finish a report, you have the option to export to use as is, edit and format further, or analyze the data. Export options include Excel (XLS), CSV, Adobe Acrobat (PDF), HTML, Advanced Report Wizard, and MySQLQuery.

You must first create a report before exporting to Excel (XLS), CSV, Adobe Acrobat (PDF), HTML, Advanced Report Wizard, or MySQLQuery

To export report data after a report is created:

1. In the Info column of the Report pane, click **Info** to expand options.
   A How We Built Your Report and an Export As.. option display.
2. click **Export As...** to expand the following options:
   - **Excel (xls)**
   - **CSV**
   - **Adobe Acrobat (pdf)**
   - **Advanced Report Wizard:** Exporting to the Advanced Report Wizard sends Data Explorer's query to the Report Wizard in a new tab. From there you may save your report with filters, formatted columns, and other Report Wizard features. This is useful for testing.
   - **MySQL Query**

Administration

Administrators can manage users, groups, data objects, and the company logo that displays on reports.

Manage Users

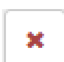
Because the Reporting Tool uses the same database as the Enterprise system, most users will already have access to the HRT and are considered remote users.

The listing displays the current users of the system. In the **Type** column, users that are identified as **Local** have access to only the reporting tool and not to the Enterprise solution. If **HUA** is shown, that means the user has access to Enterprise.

To search for a user, enter the full name or partial name, and click **Search**.

Actions on the Manage Users Screen

You can edit user details and remove users.

Icon	Definition
	Click this to edit user details.
	Click this to remove users.

Add a User

The form to add a user contains multiple tabs: **General**, **Addresses**, and **Password & Group**.

When adding a new user, it is recommended that you perform a search to verify that the user does not currently exist. Click the **Search for User** tab.

You can search for users in the Enterprise system and load their data into the form to create the user record.

Search for Users

You can enter search parameters to open a user record.

To search for users:

1. Enter all or part of the user name or email address.
2. Click **Search Remote Users**.
   Records that match the search parameters display in the **Search Results** box.
3. Select the appropriate user and click **Load Remote User Data**.
   Data populates the form and opens on the General tab.

Set General, Addresses, and Password & Group Information

Enter general, address and password information.

To set General, Addresses, and Password & Group information:

1. On the **General** tab, enter the user information.
   If you have loaded a remote user, review the information that is loaded on the tab.
2. On the **Addresses** tab, enter the user address, if available.
   If you have loaded a remote user, review the information loaded on the Addresses tab.
3. On the **Password & Group** tab, create a password for the user.
4. Follow these steps to select the **Group(s)** for the user.
   a) Click the **Group** from the listing on the left pane.
   b) Click the **>>** button to move the group to the selected column on the right pane
   c) Click the **<<** button to remove a group from the selection.
5. Click **Save**.

Manage Groups

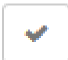
System access levels are determined by groups. Administrators can add groups and manage the group(s) to which a user belongs.

A user can be a member of one or more groups. The administrator can create additional groups. The Reporting Tool is divided into the following default user groups.

- **Report Consumers**: This user group can run reports that have been shared with them.
- **Report Creators**: This user group can create, view, schedule, and share reports with other staff members.
- **Power Users**: This group has the same access rights as the Administrator group, but cannot manage groups or add users. The members of this group can create data objects, but cannot modify any of the original data objects.
- **IT Security**: This group can manage users and groups only. The members of this group cannot view or create reports.
- **Administrators**: This group has full access to manage the system as well as create reports and data objects.
  To search for a group, enter the group name and click **Search**.

Actions on the Manage Groups Screen

You can set the default group selection for new users, edit group details and delete groups from the reporting tool.

Icon	Definition
	Click this to set the group as the system default. This is the value that automatically appears in the **Group(s)** field when you create a new user.
	Click this to edit group details.
	Click this to remove a group from the system.

Add Groups

You can add groups and define general options, set privileges that determine the options a user can access, and assign users to the group.

To add groups:

1. On the **Manage Groups** screen, click **Add**.
2. On the **General** tab, enter the group **Name** and **Description** that can help properly identify the group.
3. On the **Privileges** tab, select the **Privilege Category** from the drop-down list.

   This controls the options users can choose from in the system. For example, if the Data Object Builder is not selected the group members, then those options are hidden from the members of the group. As you select each privilege, options within that privilege are displayed underneath. Select the check box next to the items that apply to the group.
4. On the **Members** tab, select user for the group.

   To find a user, click **Add More Users**.
5. In the **First Name** and **Last Name** fields, enter the name in full or partially to find the users that belong to the group, and click **Search** button.

   The results display below the fields.
6. Select the check box next to the name in the search results list, and click **Add Selected Users**.
7. Highlight the name of the user and click **Remove** to remove users from the list.
8. Click **Save**.

Manage Data Objects

The Reporting Tool lets you create data objects that can be referenced from other data objects and reports. However, to keep your data clean administrators with proper access privileges must manage all data objects, and delete those objects that are no longer in use.

Sometimes when a data object is removed, it leaves other objects that were referenced by the deleted objects orphaned. They are unused but still appear in data object trees.

To remove unused data objects, users with the rights to manage data objects, can click the **Delete** icon that appears next to unused objects. This will remove the object from the data object tree.

Upload Your Company Logo

You can upload your company logo to the Reporting Tool using the Client Logo Upload form.

To upload the logo:

1. Click **Browse**.
2. In the browser search window, locate and highlight the image file from your computer, and click **Open**.
3. Click **Upload**.

Appendix A: Join Selected Data Objects

Joining database objects gives you access to additional data, depending upon how they are joined.

The available join types are as follows:

- **Inner Join**: This join type returns all the rows of data that match the selected criteria. This is the most commonly used type of join and is the default selection for the Reporting Tool.
- **Left Join**: This join type is also called a left outer join. The resulting list displays all data rows from the first selected object, even if there is no corresponding matching data and only the rows that match the selected criteria from the second data object.
- **Right Join**: This join type is also called the right outer join. The resulting list displays all data rows from the second selected object but only the rows from the first data object that match the selected criteria.

The Join Editor lets you add multiple join conditions. It allows you to add conditions that match columns against constant values, such as dates or strings, as well as match columns across tables.

The most common fields that Deltek Talent uses to link the tables are marked with an asterisk (*). You can also select an operator to join the tables.

Insert Conditions

You can define insert conditions in the join editor.

To insert conditions:

1. Click the **+** icon to insert conditions.
2. Select from the conditions that appear under the **Manage Conditions** section.
3. Repeat steps 1 and 2 to continue adding additional conditions in the join editor if your report needs it.
4. When you have finished selecting and joining data objects for your report, click **Add Data Object/Table** to insert your joins into the workspace.

Appendix B: Column Element Types

These tables represent the types of elements that you can use in the Column Editor.

Constants

A constant is a value that remains the same during an open session.

This includes a person's name, ID, or email address, which may differ from person to person. However, the information does not change for the same person within a session.
Constants include the following:

- Currency
- Current Time
- Date Format
- User ID
- User Login
- User Email

Functions

Functions are set elements of standard codes that help you format your data. This includes functions such as adding a date and time, or concatenating two or more columns.

String

You can find definitions of string functions from ascii to upper:

Function	Description
ascii	Returns the numeric value of the leftmost character of the string str. Returns 0 if str is the empty string. Returns NULL if str is NULL. ASCII() works for characters with numeric values from 0 to 255.

Function	Description
bin	Returns a string representation of the binary value of N, where N is a longlong (BIGINT) number. This is equivalent to CONV(N,10,2). Returns NULL if N is NULL.
bit_length	Returns the length of the string str in bits.
Char	CHAR() interprets each argument N as an integer and returns a string consisting of the characters given by the code values of those integers. NULL values are skipped.
char_length	Returns the length of the string str, measured in characters. A multi-byte character counts as a single character. This means that for a string containing five two-byte characters, LENGTH() returns 10, whereas CHAR_LENGTH() returns 5.
character_length	CHARACTER_LENGTH() is a synonym for CHAR_LENGTH().
concat	Returns the string that results from concatenating the arguments.
concat_ws	CONCAT_WS() stands for Concatenate With Separator and is a special form of CONCAT(). The first argument is the separator for the rest of the arguments. The separator is added between the strings to be concatenated. The separator can be a string, as can the rest of the arguments. If the separator is NULL, the result is NULL.
conv	Converts numbers between different number bases. Returns a string representation of the number N, converted from base from_base to base to_base. Returns NULL if any argument is NULL. The argument N is interpreted as an integer, but may be specified as an integer or a string. The minimum base is 2 and the maximum base is 36. If to_base is a negative number, N is regarded as a signed number. Otherwise, N is treated as unsigned. CONV() works with 64-bit precision.
elt	Returns str1 if N = 1, str2 if N = 2, and so on. Returns NULL if N is less than 1 or greater than the number of arguments. ELT() is the complement of FIELD().'
export_set	Returns a string such that for every bit set in the value bits, you get an on string and for every reset bit, you get an off string. Bits in bits are examined from right to left (from low-order to high-order bits). Strings are added to the result from left to right, separated by the separator string (the default being the comma character). The number of bits examined is given by number_of_bits (defaults to 64).
field	Returns the index (position) of str in the str1, str2, str3, ... list. Returns 0 if str is not found.
field_in_set	Returns a value in the range of 1 to N if the string str is in the string list strlist consisting of N substrings. A string list is a string composed of substrings separated by comma characters. If the first argument is a constant string and the second is a column of type SET, the FIND_IN_SET() function is optimized to use bit arithmetic. Returns 0 if str is

Function	Description
	not in strlist or if strlist is the empty string. Returns NULL if either argument is NULL. This function does not work properly if the first argument contains a comma character.
format	Formats the number X to a format like "#,###,###.##", rounded to D decimal places, and returns the result as a string. If D is 0, the result has no decimal point or fractional part.
hex	If N_or_S is a number, returns a string representation of the hexadecimal value of N, where N is a longlong (BIGINT) number. This is equivalent to CONV(N,10,16). If N_or_S is a string, returns a hexadecimal string representation of N_or_S where each character in N_or_S is converted to two hexadecimal digits.
insert	Returns the string str, with the substring beginning at position pos and len characters long replaced by the string newstr. Returns the original string if pos is not within the length of the string. Replaces the rest of the string from position pos is len is not within the length of the rest of the string. Returns NULL if any argument is NULL.
instr	Returns the position of the first occurrence of substring substr in string str. This is the same as the two-argument form of LOCATE(), except that the order of the arguments is reversed.
lcase	LCASE() is a synonym for LOWER().
left	Returns the leftmost len characters from the string str, or NULL if any argument is NULL.
length	Returns the length of the string str, measured in bytes. A multi-byte character counts as multiple bytes. This means that for a string containing five two-byte characters, LENGTH() returns 10, whereas CHAR_LENGTH() returns 5.
locate	The first syntax returns the position of the first occurrence of substring substr in string str. The second syntax returns the position of the first occurrence of substring substr in string str, starting at position pos. Returns 0 if substr is not in str.
lower	Returns the string str with all characters changed to lowercase according to the current character set mapping. The default is latin1 (cp1252 West European).
lpad	Returns the string str, left-padded with the string padstr to a length of len characters. If str is longer than len, the return value is shortened to len characters.
ltrim	Returns the string str with leading space characters removed.
mid	MID(str,pos,len) is a synonym for SUBSTRING(str,pos,len).

Function	Description
oct	Returns a string representation of the octal value of N, where N is a longlong (BIGINT) number. This is equivalent to CONV(N,10,8). Returns NULL if N is NULL.
octet_length	OCTET_LENGTH() is a synonym for LENGTH().
ord	If the leftmost character of the string str is a multi-byte character, returns the code for that character. The leftmost character is not a multi-byte character, ORD() returns the same value as the ASCII() function.
quote	Quotes a string to produce a result that can be used as a properly escaped data value in an SQL statement. The string is returned enclosed by single quotes and with each instance of single quote, backslash, ASCII NUL, and Control-Z preceded by a backslash. If the argument is NULL, the return value is the word “NULL” without enclosing single quotes.
repeat	Returns a string consisting of the string str repeated count times. If count is less than 1, returns an empty string. Returns NULL if str or count are NULL.
replace	Returns the string str with all occurrences of the string from_str replaced by the string to_str. REPLACE() performs a case-sensitive match when searching for from_str.
reverse	Returns the string str with the order of the characters reversed.
right	Returns the rightmost len characters from the string str, or NULL if any argument is NULL.
rpad	Returns the string str, right-padded with the string padstr to a length of len characters. If str is longer than len, the return value is shortened to len characters.
rtrim	Returns the string str with trailing space characters removed.
soundex	Returns a soundex string from str. Two strings that sound almost the same should have identical soundex strings. A standard soundex string is four characters long, but the SOUNDEX() function returns an arbitrarily long string. You can use SUBSTRING() on the result to get a standard soundex string. All non-alphabetic characters in str are ignored. All international alphabetic characters outside the A-Z range are treated as vowels.
space	Returns a string consisting of N space characters.'
substring	The forms without a len argument return a substring from string str starting at position pos. The forms with a len argument return a substring len characters long from string str, starting at position pos. The forms that use FROM are standard SQL syntax. It is also possible to use a negative value for pos. In this case, the beginning of the substring is pos characters from the end of the string, rather than the beginning. A negative value may be used for pos in any of the forms of this function.
substring_index	Returns the substring from string str before count occurrences of the delimiter delim. If count is positive, everything to the left of the final delimiter

Function	Description
	(counting from the left) is returned. If count is negative, everything to the right of the final delimiter (counting from the right) is returned. SUBSTRING_INDEX() performs a case-sensitive match when searching for delim.
ucase	UCASE() is a synonym for UPPER().
unhex	Performs the inverse operation of HEX(str). That is, it interprets each pair of hexadecimal digits in the argument as a number and converts it to the character represented by the number. The resulting characters are returned as a binary string.
upper	Returns the string str with all characters changed to uppercase according to the current character set mapping. The default is latin1 (cp1252 West European).

Date & Time

You can find definitions for Date and time functions from adddate to yearweek:

Function	Description
adddate	Adds “days” days to expr.
addtime	Datetime number of days to be added to expr.
conver_tz	CONVERT_TZ() converts a datetime value dt from the time zone given by from_tz to the time zone given by to_tz and returns the resulting value.
curdate	Returns the current date as a value in “YYYY-MM-DD” or YYYYMMDD format, depending on whether the function is used in a string or numeric context.
curtime	Returns the current time as a value in “HH:MM:SS” or HHMMSS format, depending on whether the function is used in a string or numeric context.
current_time	CURRENT_TIME() is a synonym for CURTIME().'
daterip	Extracts the date part of the date or datetime expression expr.
date_adds	Adds an interval to a date.
date_diff	DATEDIFF() returns expr1 ? expr2 expressed as a value in days from one date to the other. expr1 and expr2 are date or date-and-time expressions. Only the date parts of the values are used in the calculation.
date_format	Formats the date value according to the format string.
date_subs	Substracts an interval from a date.
day	DAY() is a synonym for DAYOFMONTH().
dayname	Returns the name of the weekday for date.

Function	Description
dayofmonth	Returns the day of the month for date, in the range 0 to 31.
dayofweek	Returns the weekday index for date (1 = Sunday, 2 = Monday, ?, 7 = Saturday). These index values correspond to the ODBC standard.
dayofyear	Returns the day of the year for date, in the range 1 to 366.
extract	Extracts parts from the date.
from_days	Given a day number N, returns a DATE value.
from_unixtime	Returns a representation of the unix_timestamp argument as a value in “YYYY-MM-DD HH:MM:SS” or YYYYMMDDHHMMSS format, depending on whether the function is used in a string or numeric context. unix_timestamp is an internal timestamp value such as is produced by the UNIX_TIMESTAMP() function.
hour	Returns the hour for time. The range of the return value is 0 to 23 for time-of-day values. However, the range of TIME values actually is much larger, so HOUR can return values greater than 23.
last_days	Takes a date or datetime value and returns the corresponding value for the last day of the month. Returns NULL if the argument is invalid.
localtime	LOCALTIME() is a synonym for NOW().
localtimestamp	LOCALTIMESTAMP() is a synonym for NOW().
makedate	Returns a date, given year and day-of-year values. dayofyear must be greater than 0 or the result is NULL.
maketime	Returns a time value calculated from the hour, minute, and second arguments.
microsecond	Returns the microseconds from the time or datetime expression expr as a number in the range from 0 to 999999
minute	Returns the minute for time, in the range 0 to 59.
month	Returns the month for date, in the range 0 to 12.
monthname	Returns the full name of the month for date.
now	Returns the current date and time as a value in “YYYY-MM-DD HH:MM:SS” or YYYYMMDDHHMMSS format, depending on whether the function is used in a string or numeric context.
period_add	Adds N months to period P (in the format YYMM or YYYYMM). Returns a value in the format YYYYMM. Note that the period argument P is not a date value.
period_diff	Returns the number of months between periods P1 and P2. P1 and P2 should be in the format YYMM or YYYYMM. Note that the period arguments P1 and P2 are not date values.

Function	Description
quarter	Returns the number of months between periods P1 and P2. P1 and P2 should be in the format YYMM or YYYYMM. Note that the period arguments P1 and P2 are not date values.
second	Returns the second for time, in the range 0 to 59.
sec_to_time	Returns the seconds argument, converted to hours, minutes, and seconds, as a value in "HH:MM:SS" or HHMMSS format, depending on whether the function is used in a string or numeric context.
str_to_date	This is the inverse of the DATE_FORMAT() function. It takes a string str and a format string format. STR_TO_DATE() returns a DATETIME value if the format string contains both date and time parts, or a DATE or TIME value if the string contains only date or time parts.
subtime	SUBTIME() returns expr1 ? expr2 expressed as a value in the same format as expr1. expr1 is a time or datetime expression, and expr2 is a time expression.
sysdate	Returns the current date and time as a value in "YYYY-MM-DD HH:MM:SS" or YYYYMMDDHHMMSS format, depending on whether the function is used in a string or numeric context.
time	Extracts the time part of the time or datetime expression expr and returns it as a string.
timediff	IMEDIFF() returns expr1 ? expr2 expressed as a time value. expr1 and expr2 are time or date-and-time expressions, but both must be of the same type.
timestamp	With a single argument, this function returns the date or datetime expression expr as a datetime value. With two arguments, it adds the time expression expr2 to the date or datetime expression expr1 and returns the result as a datetime value.
timestampadd	Adds the integer expression interval to the date or datetime expression datetime_expr. The unit for interval is given by the unit argument, which should be one of the following values: FRAC_SECOND, SECOND, MINUTE, HOUR, DAY, WEEK, MONTH, QUARTER, or YEAR.
timestamp	Returns the integer difference between the date or datetime expressions datetime_expr1 and datetime_expr2. The unit for the result is given by the unit argument. The legal values for unit are the same as those listed in the description of the TIMESTAMPADD() function.
time_format	This is used like the DATE_FORMAT() function, but the format string may contain format specifiers only for hours, minutes, and seconds. Other specifiers produce a NULL value or 0.
time_to_sec	Returns the time argument, converted to seconds.
to_days	Given a date, returns a day number (the number of days since year 0).

Function	Description
unix_timestamp	If called with no argument, returns a Unix timestamp (seconds since “1970-01-01 00:00:00” UTC) as an unsigned integer. If UNIX_TIMESTAMP() is called with a date argument, it returns the value of the argument as seconds since “1970-01-01 00:00:00” UTC. date may be a DATE string, a DATETIME string, a TIMESTAMP, or a number in the format YYMMDD or YYYYMMDD. The server interprets date as a value in the current time zone and converts it to an internal value in UTC.
utc_date	Returns the current UTC date as a value in “YYYY-MM-DD” or YYYYMMDD format, depending on whether the function is used in a string or numeric context.
utc_time	Returns the current UTC time as a value in “HH:MM:SS” or HHMMSS format, depending on whether the function is used in a string or numeric context.
utc_timestamp	Returns the current UTC date and time as a value in “YYYY-MM-DD HH:MM:SS” or YYYYMMDDHHMMSS format, depending on whether the function is used in a string or numeric context.
week	This function returns the week number for date. The two-argument form of WEEK() allows you to specify whether the week starts on Sunday or Monday and whether the return value should be in the range from 0 to 53 or from 1 to 53.
weekday	Returns the weekday index for date (0 = Monday, 1 = Tuesday, ? 6 = Sunday).
weekofyear	Returns the calendar week of the date as a number in the range from 1 to 53. WEEKOFYEAR() is a compatibility function that is equivalent to WEEK(date,3).
year	Returns the year for date, in the range 1000 to 9999, or 0 for the “zero” date.
yearweek	Returns year and week for a date. The mode argument works exactly like the mode argument to WEEK(). The year in the result may be different from the year in the date argument for the first and the last week of the year.

Aggregate

You can find definitions for aggregate functions from avgr to variance:

Function	Description
avgr	Returns the average value of expr.
bit_and	Returns the bitwise AND of all bits in expr. The calculation is performed with 64-bit (BIGINT) precision. Returns the bitwise XOR of all bits in expr. The calculation is performed with 64-bit (BIGINT) precision.

Function	Description
bit_or	Returns the bitwise OR of all bits in expr. The calculation is performed with 64-bit (BIGINT) precision. Returns the bitwise XOR of all bits in expr. The calculation is performed with 64-bit (BIGINT) precision.
bit_xor	Returns the bitwise XOR of all bits in expr. The calculation is performed with 64-bit (BIGINT) precision. Returns the bitwise XOR of all bits in expr. The calculation is performed with 64-bit (BIGINT) precision.
count	Returns a count of the number of non-NULL values in the rows retrieved by a SELECT statement. The result is a BIGINT value. COUNT() returns 0 if there were no matching rows.
count_distinct	Returns a count of the number of non-NULL distinct values in the rows retrieved by a SELECT statement. The result is a BIGINT value. COUNT() returns 0 if there were no matching rows.'
group_contact	Returns a string result with the concatenated non-NULL values from a group. It returns NULL if there are no non-NULL values.
group_contact_distinct	Returns a string result with the concatenated non-NULL DISTINCT values from a group. It returns NULL if there are no non-NULL values.
min	Returns the minimum value of expr.
max	Returns the maximum value of expr.
stddev	Returns the population standard deviation of expr (the square root of VAR_POP()).
stddev_samp	Returns the sample standard deviation of expr (the square root of VAR_SAMP().
sum	Returns the sum of expr. If the return set has no rows, SUM() returns NULL.
var_pop	Returns the sum of expr. If the return set has no rows, SUM() returns NULL.
var_samp	Returns the sample variance of expr. That is, the denominator is the number of rows minus one.
variance	Returns the population standard variance of expr.

Mathematical

You can find definitions for mathematical functions from abs to truncate.

Function	Description
abs	Returns the absolute value of X.
acos	Returns the arc cosine of X, that is, the value whose cosine is X. Returns NULL if X is not in the range -1 to 1.
asin	Returns the arc sine of X, that is, the value whose sine is X. Returns NULL if X is not in the range -1 to 1.

Function	Description
atan	Returns the arc tangent of the two variables X and Y. It is similar to calculating the arc tangent of Y / X, except that the signs of both arguments are used to determine the quadrant of the result.
ceil	Returns the smallest integer value not less than X.
cos	Returns the cosine of X, where X is given in radians.
cot	Returns the cotangent of X.
crc32	Computes a cyclic redundancy check value and returns a 32-bit unsigned value. The result is NULL if the argument is NULL. The argument is expected to be a string and (if possible) is treated as one if it is not.
degrees	Returns the argument X, converted from radians to degrees.
exp	Returns the value of e (the base of natural logarithms) raised to the power of X.
floor	Returns the largest integer value not greater than X.
ln	Returns the natural logarithm of X; that is, the base-e logarithm of X.
log	If called with one parameter, this function returns the natural logarithm of X. If called with two parameters, this function returns the logarithm of X for an arbitrary base B.
log2	Returns the base-2 logarithm of X.
log10	Returns the base-10 logarithm of X.
mod	Modulo operation. Returns the remainder of N divided by M.
pi	Returns the value of ? (pi). The default number of decimal places displayed is seven, but MySQL uses the full double-precision value internally.
pow	Returns the value of X raised to the power of Y.
radians	Returns the argument X, converted from degrees to radians. (Note that ? radians equals 180 degrees.)
rand	Returns a random floating-point value v between 0 and 1 inclusive (that is, in the range 0 <= v <= 1.0). If an integer argument N is specified, it is used as the seed value, which produces a repeatable sequence of column values.
round	Returns the argument X, rounded to the nearest integer. With two arguments, returns X rounded to D decimal places. D can be negative to cause D digits left of the decimal point of the value X to become zero.
sign	Returns the sign of the argument as -1, 0, or 1, depending on whether X is negative, zero, or positive.
sin	Returns the sine of X, where X is given in radians.
sqrt	Returns the square root of a non-negative number X.

Function	Description
tan	Returns the tangent of X, where X is given in radians.
truncate	Returns the number X, truncated to D decimal places. If D is 0, the result has no decimal point or fractional part. D can be negative to cause D digits left of the decimal point of the value X to become zero

Logical Functions

You can find definitions for logical functions such as and, if, ifnull, and or.

Function	Description
and	Returns 1 only if all contained expressions evaluate to non-zero. Returns 0 otherwise.
if	Evaluates the expression.
ifnull	Evaluates the expression and executes the second argument if true.
or	Returns 1 if any of the contained expressions evaluate to non-zero. Returns 0 otherwise.

Other Functions

Find definitions for other functions from bit_count to version.

Function	Description
bit_count	Returns the number of bits that are set in the argument N.
charset	Returns the character set of the string argument.
coercibility	Returns the collation coercibility value of the string argument.
collation	Returns the collation of the string argument.
compress	Compresses a string and returns the result as a binary string. This function requires MySQL to have been compiled with a compression library such as zlib. Otherwise, the return value is always NULL. The compressed string can be uncompressed with UNCOMPRESS().
decode	Decrypts the encrypted string crypt_str using pass_str as the password. crypt_str should be a string returned from ENCODE().
des_crypt	Decrypts a string encrypted with DES_ENCRYPT(). If an error occurs, this function returns NULL.
des_enctrypt	Encrypts the string with the given key using the Triple-DES algorithm.
encoder	Encrypts str using pass_str as the password. To decrypt the result, use DECODE().

Function	Description
encrypt	Encrypts str using the Unix crypt() system call and returns a binary string. The salt argument should be a string with at least two characters. If no salt argument is given, a random value is used.
md5	Calculates an MD5 128-bit checksum for the string. The value is returned as a binary string of 32 hex digits, or NULL if the argument was NULL. The return value can, for example, be used as a hash key.
sha1	Calculates an SHA-1 160-bit checksum for the string, as described in RFC 3174 (Secure Hash Algorithm). The value is returned as a binary string of 40 hex digits, or NULL if the argument was NULL. One of the possible uses for this function is as a hash key. You can also use it as a cryptographic function for storing passwords. SHA() is synonymous with SHA1().
uncompress	Uncompresses a string compressed by the COMPRESS() function. If the argument is not a compressed value, the result is NULL. This function requires MySQL to have been compiled with a compression library such as zlib. Otherwise, the return value is always NULL
uncompressed	Returns the length that the compressed string had before being compressed.
version	A SELECT statement may include a LIMIT clause to restrict the number of rows the server returns to the client. In some cases, it is desirable to know how many rows the statement would have returned without the LIMIT, but without running the statement again. To obtain this row count, include a SQL_CALC_FOUND_ROWS option in the SELECT statement, and then invoke FOUND_ROWS() afterward:

Types

This element lets you indicate the data type that will display in the column as either a string or a date.

Type elements include the following:

- Date
- interval_unit
- String
- Null
- Raw SQL

Operators

The operator group is composed of mathematical operators like "+", "-", "x", "/", etc. that you can use to edit your data column.

Operators include the following:

- Addition
- Division
- Division_module
- Multiplication
- Subtraction

Comparators

The comparator group allows you to make comparisons like equal to, greater than and less than using the "<", ">", "=", "<>" math symbols.

Comparators include the following:

- Equal to
- Less than
- Less than or equal to
- Greater than
- Greater than or equal to
- Not equal to
- In
- Not in
- Is
- Is not

Recruiting Reports

Use these reports to generate data related to the recruitment process, such as creating job posts, searching and selecting candidates, processing job offers, and initiating the onboarding process of successful candidates.

The Recruiting Reports are categorized into blocks.

To view the purpose of any report, hover over its name.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

Requisition Activity

Use this section to generate detailed information about your company's job requisitions.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Candidate Activity by Requisition Report

Use this report to view how many individuals are currently in each Candidate Status.

Use this report to view the list of Candidates in each Candidate Status. You can narrow down the results using the filter criteria on this screen.

Quality of Applicants Report

Use this report to view the evaluation scores for all applicants attached to the selected Job Title.

Use this report to view screening questionnaire scores, assessment scores, and scorecard values for all applicants attached to the Job Title that you have selected.

Recruiter Effectiveness Report

Use this report to display how efficiently Recruiters are able to process requisitions and fill vacancies.

Use this report to display by Recruiter Name the number of **Open**, **Pending**, **Held**, and **Filled** requisitions, as well as those still in the approval process. It also includes an average number of days to fill the position.

The date range you select narrows down the results according to creation date.

Recruiter Productivity Report

Use this report to calculate the total candidate status activity for each selected Recruiter.

Use this report to view the number of hires needed for the position versus how many candidates the selected Recruiter has processed. This reports also details how many candidates there currently are in each step of the recruitment process.

The date range you select narrows down the results according to when the Recruiter assigned the current status to the Candidate.

Requisition Details Report

Use this report to display a variety of information about a requisition based on your selected criteria.

Use this report to generate detailed requisition information, such as how long a requisition has been posted, what is the current status, how many Hires are required, and who are the Hiring Managers.

Requisition Status Log Report

Use this report to display the current status for a particular requisition.

A requisition may go through several status changes, such as **Open**, **Internal**, or **Held**, until it is finally changed to **Filled** status. Use this report to show the current status of the selected requisition(s).

Sources

Use this section to view information about the avenues that generate candidate referrals, such as social media, print or TV advertisements, and employee referrals, as well as how effective are those sources.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Referral Sources Report

Use this report to display a list of requisitions according to the referral source selected by job seekers when they initially created an account.

The date filters allow you to limit the results within the specified date range and to a specific list of referral sources only.

Social Media Recruiting Overview Report

Use this report to generate an overview of applications received through the various social media avenues.

Use this report to display a comparison of overall applications coming through the various social media sites, as well as a breakdown of applications received from individuals who shared the requisition.

Sourcing Effectiveness Report

Use this report to display the number of applications*, screened-ins, hires, screened-to-hired ratio and percentage of total hires by referral source.

In this report, the term "Applications" is defined as the number of times a job seeker applied to a job vacancy. This means that if a job seeker applied to three different jobs, then that is counted as three separate applications.

The date filters allow you to limit the results within date range when the job was opened.

Employee Referral

Use this section to view data about employee referral-associated requisitions, such as referral awards and referral activity information.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Earned Awards by Job Report

Use this report to lists the bonuses and payout schemes earned by referrers.

Use this table to generate data about the awards earned by referring successful candidates to job vacancies. The date filters allow you to limit the results within the specified date range.

Jobs With Referral Options Report

Use this report to display current statistics from the Employee Referral Program, such as the total number of referrals by job, as well as the referral amounts and number of hires.

The date filters allow you to limit the results within the specified date range when the referral was made.

Jobs With Referrals Report

Use this report to display the jobs that were open for referral during the selected time frame, as well as the number of referrals for each job that has referrals.

Use this report to display jobs that were open and have referrals during the selected time frame.

Referral Activity Report

Use this report to display a list of referrers that refer the most job seekers.

Use this report to list the users who made a referral during the selected date range.

Hires

Use this section to generate data surrounding the hiring process, such as hiring costs and duration of the hiring campaign.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Cost Per Hire Report

Use this report to display the totals by requisition for each element entered in the Cost per Hire and the Offer Details sections of the Recruiting module.

Use this report to display the cost information for Advertising, Subscriptions, Relocation Assistance, Bonuses, Travel Expenses, Fees, as well as the Total cost for hiring the selected requisition(s).

Hire Details Report

Use this report to display information about Hires based on the search criteria you select.

Narrow down the scope of your report by selecting from the available filters.

Quality of Hire Report

Use this report to generate performance score and overall potential for the list of individuals hired within your selected time frame.

Latest Performance Score information is pulled from the Performance module. Information on the employee's overall potential is pulled from the Career Development module.

Time to Fill Report

Use this report to display the number of days it took to fill a job.

If there is more than one hire per job, see the Time to Hire report for how long it took to hire individuals to a particular job.

Time to Hire Report

Use this report to generate data about how many days it took to hire a candidate.

This report displays the number of days it took to hire a candidate.

Cross-Posting

Use this section to generate information about cross-posting requisitions to external job boards.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Click Tracking Report

Use this report to generate a per job breakdown of the number of interested applicants.

This report gives a breakdown of the number of interested applicants per job.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Cross-Posted Job Status Report

Use this report to list all the jobs that have been posted to job boards, the date they initially posted, and the date they stopped posting.

This report lists all the jobs that have been posted to job boards, as well as the start and end dates for posting.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Job Post Count Per Recruiter Per Site Report

Use this report to list all the recruiters that have posted jobs to job boards, as well as how many jobs they have posted.

This report generates a list of recruiters who posted jobs to job boards and how many jobs they have posted.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Job Post Count Per Site Report

Use this report to list all the recruiters that have posted jobs to job boards and how many jobs they have posted per board.

Posted Sites Report

Use this report to display information on jobs that have been cross-posted.

This report displays information on cross-posted jobs.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Posting Authorization Report

Use this report to display the details of jobs that are currently cross-posted.

This report displays the jobs that are currently cross-posted.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Queuing Report

Use this report to list all the jobs that have been requested for cross-posting, as well as the errors that were caught in the validation process before the job was sent.

This report lists the jobs that have been requested for cross-posting. It also includes information about the errors encountered during the validation process before the job was sent.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Referring Site Sources Per Job Report

Use this report to list individual applicants that applied for jobs and from which board.

This report lists the applicants per job board.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Sending Report

Use this report to list whenever a job is sent to a job board.

This report displays log entries whenever a job is sent to a job board.

Jobs can be cross-posted to multiple external job boards from this screen. If the option of **Allow cross-posting recruiters to edit contact information** is enabled in the Cross-posting settings, recruiters will see and can change the contact information. Otherwise, the default information set by the Site Administrator will be used and the contact information is not displayed.

Diversity

Use this section to generate data about diversity information, such as diversity statistics, referral sources, and current status of job seekers who fall under diversity categories.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Diversity Details by Requisition Report

Use this report to display the location, self-identified and visual surveyed Diversity Information statistics, referral source and current status of job seekers to a specific job vacancy.

The date filters allow you to limit the results within the specified date range when the job seeker applied to the selected job vacancy.

Diversity Statistics Report

Use this report to display diversity information for all résumés/CVs in the system; both self-identified (SI) and visual surveyed (VS), if applicable.

The date filters allow you to limit the results within the specified date range when the résumé/CV was created.

Affirmative Action Details Report

This report pulls the **AA Plan ID**, **EEOC Job Category**, and **Job Group** details from the requisition. It will return all applicants attached to a requisition with their self-identified diversity statistics.

The date filters allow you to limit the results within the specified date range when the job was opened.

EEO-1 Report

Use this report to display the gender and ethnicity count for each EEOC Job Category.

The date filters allow you to limit the results within the specified date range only.

Custom Reports

Use this section to view and create custom reports.

Click **Custom Reports** to view the reports that have been created for the module or to create new custom reports.

Learning Reports

Use these reports to generate data related to courses, classes, and certifications

The reports are categorized into blocks.

To view the purpose of any report, hover over its name.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

Certifications

Use this section to generate data about the learning certification programs available in your company, as well as the external and internal certifications earned by your employees.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

Certifications Expiring Report

Use this report to view the learning certifications that are set to expire within the number of days you have indicated.

Click the report name to view the certifications that are expiring within the range of days you have selected.

Contents of the Certifications Expiring Report

Use this report to view the learning certifications that are set to expire within the number of days you have indicated.

Use these options to narrow down and display your report.

Options for the Certifications Expiring Report

Field	Description
Number of Days Until Certification Expire	In this field, enter the number of days to use as the scope for the report.
Search	Click this button to run the report.
Report	Click this button to return to the Learning Reports screen.

Courses

Use this section to generate data about your company's courses.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Course Effectiveness by Appraisal Competencies Report

Use this report to display the competencies for the selected Employee Performance Management workflow, as well as the enrollment statistics versus the average company performance score on the competencies.

This report displays a graphical representation of the workflow you have selected.

Contents of the Course Effectiveness by Appraisal Competencies Report

Use this to view the competencies for the selected Employee Performance Management workflow, as well as the enrollment statistics verses the average company performance score on the competencies.

Select the following options to filter results.

Contents

Field	Description
Workflows	

Course Skills and Competencies Report

Use this report to display a list of courses with any the selected skills and/or competencies.

In the results table, the selected skills or competencies are highlighted with bold styling so they are easily distinguishable.

Contents of the Course Skills & Competencies Report

Use this to display a list of courses with any the selected skills and/or competencies.

In the results table, the selected skills or competencies are highlighted with bold styling so they are easily distinguishable. To select more than one skill or competency in a select box, use the **Ctrl** key and select only those skills or competencies you want to use as search criteria. To view all courses with skills and competencies, click the **Reports** button to search without selecting any skills or competencies. This report will only display those courses with skills or competencies.

Contents

Field	Description
Skills	
Competencies	

Courses With Watch Lists Report

Use this report to display a list of the courses that have students on the waiting list and the number of classes in each course.

Contents of the Courses With Watch Lists Report

Use this report to show the courses that have students on the waiting list, as well as the number of classes in each course.

Options for the Courses With Watch Lists Report

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
More Options	Select **Download as XLS** to save a copy of the report in Microsoft Excel format. Select **Report** to return to the Learning Reports screen.

Contents of the Courses With Watch Lists Report

Field	Description
Course Name	This is the title of the course.
Watch List	This indicates the number of students listed on the waiting list.
Classes	This indicates the number of classes associated with the course.

Performance Competencies Without Courses Report

Use this report to display the list of competencies that do no have associated courses.

Select from the list of Performance Workflows. The resulting table displays the competencies, and the corresponding Low Score, High Score and Average Score employees earned for each competency.

Contents of the Performance Competencies Without Courses Report

Use this to generate a report using the **Competency Name** from the selected Workflow to display the **Low Score**, the **High Score** and the **Average Score** employees earned for each competency.

Options for the Performance Competencies Without Courses Report

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
More Options	Select **Download as XLS** to save a copy of the report in Microsoft Excel format. Select **Report** to return to the Learning Reports screen.

Contents of the Performance Competencies Without Courses Report

Field	Description
Competency Name	This is the title of the course.
Low Score	This indicates the number of students listed on the waiting list.
High Score	This indicates the number of classes associated with the course.

Field	Description
Average Score	
Actions	Click ✚ to launch the Course Creation Wizard and create a new course for the Competency.

Successors Course Completion Report

The report will list the succession plan participants showing their completion dates in the selected class(es)

Contents of the Successors Course Completion Report

View participants in the selected succession plan and the completion date of the selected course(s).

Options for the Successors Course Completion Report

Field	Description
Courses	
Course Keyword	
Skills	
Competencies	
Succession Plan	
Report	Click this button to return to the previous Reports menu screen.

Contents of the Courses With Watch Lists Report

Field	Description
Course Name	This is the title of the course.
Watch List	This indicates the number of students listed on the waiting list.
Classes	This indicates the number of classes associated with the course.

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
More Options	Select **Download as XLS** to save a copy of the report in Microsoft Excel format. Select **Report** to return to the Learning Reports screen.

Upcoming Recurring Compliance Courses Report

Use this report to display the list of students who are attached to a course that has a recurring requirement due within a specified number of days.

Library Sources

Use this section to generate data about resources, such as books and videos, from your organization's learning library.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Checked Out Library Resources Report

Use this report to display the Library Resources that have been checked out by students.

This report displays a table that shows the **Resource Name** and **Type**, as well as the name, email address, and manager of the student who checked out the resource. Here you can also view the **Check Out** and **Due Back** dates for each resource.

Library Resources Report

Use this report to display detailed information about the library resources available in your company.

This report displays a table that shows the **Resource Name** and **Type**, as well as the **Presentation Method**, **Publication Year**, and resource **Author**. Here you can also view how many **Copies** are available and the **Check Out Interval**, which indicates how many days the resource can be checked out by an employee.

Library Resources with Waiting List Report

Use this report to view detailed information about all the library resources in your company that have a list of students waiting to use them.

This report displays the Library Resources that have been depleted and have employees waiting to check them out. The table shows the **Resource Name** and **Type**, the number of **Copies** in the library and how many of the copies are currently checked out. Here, you can also see the number of employees on the wait list.

Overdue Library Resources Report

Use this report to view detailed information about library resources that have not yet been returned past their due dates.

This report displays currently overdue library resources. The table shows the name of the resource and the date it was due for return, as well as the name and email address of the student who checked it out.

Here you can also view how many days the resource is overdue.

Tuition Assistance Administration Section of the Learning Reports Screen

Use this section to generate data about resources, such as books and videos, from your organization's learning library.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Tuition Assistance Totals by Date Range Report

Use this report to view detailed information about approved tuition assistance requests for the specific time period.

This report displays the approved tuition assistance given to the selected Job Family during the date range you have selected.

Tuition Assistance by Date Report

Use this report to view detailed information about the tuition assistance requested by students.

The amounts displayed in this report are combined for each date. The list is sorted according to **Request Date**.

Tuition Assistance Disposition Breakdown Report

Use this graphical report to view the percentage of tuition assistance dispositions during the specified time period.

This pie chart shows the percentage of Tuition Assistance Dispositions during the date range you have selected.

Classes

Use this section to generate data about the classes created for your company.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Class Participation by Attendance Report

Use this report to display class participation by showing attendance statistics for the selected date range.

The date filters allow you to limit the results within the specified date range, otherwise the report will return information for all classes.

You can download the report as a CSV, PDF, or XLS file by clicking the appropriate Download Format link.

Instructor Facilitation Activity Report

Use this report to display detailed information about instructor activity for a selected facility during the selected date range.

This report displays the classes from your selected date or date range and the instructors assigned to teach them.

If you choose to select an instructor name in the report filter, the report will show the classes taught by that instructor and the date or date range of those classes.

Instructor Performance Report

Use this report to view the performance of the students in each class based on the criteria you have selected.

This report displays a bar chart of the average grade and the number of enrolled students.

Performance Competencies without Classes Report

Use this report to list all competencies for an appraisal workflow that does not have a class in **Registering** status.

This report displays the **Competency Name** from the selected **Workflow**. It shows the name of the course that allows students to specific Competencies, as well as the current **Low Score**, **High Score** and **Average Score** for each competency.

If a competency shows a low average score, this may indicate that employees might benefit from another class offered in the course.

Roster of Enrolled Students Report

Use this report to display a list of enrollees for each class, which you can use as a sign in sheet.

This report displays a list of classes that are either in **Enrolling** or **In Progress** status that have enrolled students. The class roster includes the names of the students and the start date of the class.

Student Class History Report

Use this report to display information about each class with enrolled students.

The date filters allow you to limit the results within the specified date range and to a specific list of classes only.

Training Hours Report

Use this report to display the internal and external training hours of an employee.

This report displays the internal and external training hours of employee you have selected.

Training Required Versus Training Accomplished Report

Use this report to display the employees listed in the selected succession plan and the enrollment date(s) for any required training for the job.

This report lists the individuals in the selected succession plan and shows the completion date of the required training. To run the report select a Succession Planfrom the list and click **Search**.

The results show three groups, the **Incumbent(s)**, the **Plan Participants** and the employees **In** [the] **Talent Pool**. The required training is shown in columns, and the completion date is displayed if the individual has completed the course, otherwise an **N/A** is displayed.

You can download the report in CSV, PDF, or XLS format by clicking the appropriate Download Format link.

Curriculum

Use this section to generate data about the curricula created for your company and the courses associated with each curriculum.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Career Path Participants with Curricula Report

Use this report to display the Career Plan Participants for the selected job and view the curriculum participation and certifications for each participant.

This report lists the participants for the **Job** you have selected. The results are displayed in a table that includes the **Participant's Name**, the **Career Path Start Date**, and any **Curriculum** and **Certifications** in progress, completed, and earned for each participant.

You can download this report as a PDF by clicking **Download**.

Curriculum by Associations Report

Use this report to display a list of curricula and the students enrolled in them based on user association, such as Organizational Unit, Job Family, Job Role, and Location.

This report displays a list of curricula based on the associations you have selected, such as Company, Division, Department, Job Family, Location, and Job Role.

Here, you can see the students enrolled in each curricula, the courses and classes for the curriculum, as well as the students' grades if available.

Curriculum Participation Report

Use this report to display a bar chart of all the active curricula in your company and the percentage of employee population currently enrolled in each curriculum.

This report lists all active curricula and the percentage of employee population currently participating in each.

New Hire Curriculum Courses without Classes Report

Use this report to list the New Hire Courses that currently have no classes.

This report displays a list of courses that are part of the New Hire curriculum that do not have any associated classes.

Overdue New Hire Curriculum Report

Use this report to display a list of all employees who have not completed their New Hire Curriculum within the specified duration.

This report shows all the employees who have not completed the New Hire Curriculum within the specified deadline.

Tests

Use this section to generate data about tests created for your company.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Copied Test Trends Report

Use this report to display the copied tests and copying trends for the class and test you specified.

After search by either the **Test Name** (partial or whole) or the **Class Name** (partial or whole), this table displays the tests that have been copied and the details of both original and copied test.

Test Success Report

Use this report to display a list of tests based on your selected criteria and the percentage of **Failed**, **Passed**, and **Average** scores.

After searching by either the Course Name (partial or whole), Class Name (partial or whole), or Instructor Name (partial or whole), this table displays percentage of **Failed**, **Passed**, and **Average** scores.

Custom Reports

Use this section to view and create custom reports.

Click **Custom Reports** to view the reports that have been created for the module or to create new custom reports.

Performance Reports

Use reports related to appraisals and goals to manage employees.

Available Actions

You can complete the following actions on this report:

- To view the purpose of any report, hover over its name.
- If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.
- To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

360 Appraisal Scores Report

Use this report to view information about 360 Appraisals, including scores.

Use this report to view details about 360 Appraisals, such as the employee, manager, and participants involved, the current phase, and any score associated with the appraisal.

Contents of the 360 Appraisal Scores Report

Use this report to view details of 360 Appraisals, including scores.

Options to Filter Report Results

Select options to filter results.

Field	Description
Managers	Click **Select Manager** and select a manager from the **Manager** drop-down field. Click **Search** to return a list of employees with the selected manager. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Employees	Click **Select an Employee** and specify search criteria by entering keywords such as part of an employee's name, in the **Search** field, or selecting a manager from the **Manager** field. Then click **Search** to return a list of results that match your search criteria. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Include Terminated Employees	Click to include performance appraisals for terminated employees that meet other filter criteria.

When finished making filter selections, click **Filter** to run the report.

Contents of the Report

This report lists details related to 360 appraisals that meet the criteria of filter options selected.

Goal Progress Report

Use this report to view appraisal goals including their current status, dates, and progress.

Contents of the Goal Progress Report

Use this report to view appraisal goals including their current status, dates, and progress.

Options to Filter Report Results

Select filter criteria to narrow goals shown on the report.

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.
Managers	Click **Select Manager** and select a manager from the **Manager** drop-down field. Click **Search** to return a list of employees with the selected manager. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Employees	Click **Select an Employee** and specify search criteria by entering keywords such as part of an employee's name, in the **Search** field, or selecting a manager from the **Manager** field. Then click **Search** to return a list of results that match your search criteria. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Status	Select a status to filter on for the report, such as Completed or Open.
Related Goal	Click **Browse** and select a goal to narrow report results to those linked to the selection as a related goal.
Include Terminated Employees	Click to include performance appraisals for terminated employees that meet other filter criteria.

When finished making filter selections, click **Filter** to run the report.

Contents of the Report

This report displays goals that meet selected filter criteria, including their current status, dates, and progress.

Actions

Field	Description
Report	Click this button to return to the previous Reports menu screen.

Appraisal Scores Report

Use this report to view employee appraisal scores and various appraisal details.

Use this report to view details about Appraisals, such as the employee and manager involved, the current phase, and the calculated, override and overall scores, if applicable.

Contents of the Appraisal Scores Report

Use this report to view employee appraisal scores and various appraisal details.

Options to Filter Report Results

Select criteria to use to narrow appraisals shown on the report based on filter criteria.

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.
Managers	Click **Select Manager** and select a manager from the **Manager** drop-down field. Click **Search** to return a list of employees with the selected manager. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Employees	Click **Select an Employee** and specify search criteria by entering keywords such as part of an employee's name, in the **Search** field, or selecting a manager from the **Manager** field. Then click **Search** to return a list of results that match your search criteria. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Status	Select a status to filter on for the report, such as Completed or Open.
Launch Date From	Enter a date to mark the beginning of the range of launch dates you want to use to select appraisals to include on the report.
Launch Date To	Enter a date to mark the end of the range of launch dates to include.

Field	Description
Include Terminated Employees	Click to include performance appraisals for terminated employees that meet other filter criteria.

When finished selecting filter criteria, click **Filter** to run the report.

Contents of the Report

This report lists details of employee appraisals that meet the criteria of the selected filter options.

Actions

Field	Description
Report	Click this button to return to the previous Reports menu screen.
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.

Delinquent Appraisal Report

Use this report to view a list of appraisals that are on the schedule but not closed yet due to signatures not being completed or other reasons delaying completion.

Contents of the Delinquent Appraisal Report

Use this report to view a list of appraisals that are on the schedule but not closed yet due to signatures not being completed or other reasons delaying completion.

Options to Filter Report Results

Select options to filter results.

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.
Managers	Click **Select Manager** and select a manager from the **Manager** drop-down field. Click **Search** to return a list of employees with the selected manager. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.

Field	Description
Employees	Click **Select an Employee** and specify search criteria by entering keywords such as part of an employee's name, in the **Search** field, or selecting a manager from the **Manager** field. Then click **Search** to return a list of results that match your search criteria. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Include Terminated Employees	Click to include performance appraisals for terminated employees that meet other filter criteria.

When finished selecting criteria, click **Filter** to run the report.

Contents of the Report

This report includes details about appraisals that are on the schedule but not yet closed, and which meet the criteria of the specified filter options.

Phase Status Report

Use this report to view which phase each employee appraisal is in, including the start and end date, where applicable.

Contents of the Phase Status Report

Use this report to view which phase each employee appraisal is in, including the start and end date, where applicable.

Options to Filter Report Results

Select options to filter results.

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.
Managers	Click **Select Manager** and select a manager from the **Manager** drop-down field. Click **Search** to return a list of employees with the selected manager. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click **Add All Selected** to add multiple employees. When finished, click **Confirm Selection**.
Employees	Click **Select an Employee** and specify search criteria by entering keywords such as part of an employee's name, in the **Search** field, or selecting a manager from the **Manager** field. Then click **Search** to return a list of results that match your search criteria. Check each employee you want to include on the report and click the add icon ✚ to add a single employee, or click

Field	Description
	Add All Selected to add multiple employees. When finished, click **Confirm Selection**.
Launch Date From	Enter a date to mark the beginning of the range of launch dates you want to use to select appraisals to include on the report.
Launch Date To	Enter a date to mark the end of the range of launch dates to include.
Include Terminated Employees	Click to include performance appraisals for terminated employees that meet other filter criteria.

Contents of the Report

This report lists details about the current phase of employee appraisals that meet selected filter criteria.

Actions

Field	Description
Report	Click this button to return to the previous Reports menu screen.
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.

Career Paths Reports

Managers use these reports to help guide their employees in their career planning.

Available Actions

You can complete the following actions on this report:

- To view the purpose of any report, hover over its name.
- If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.
- To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

Bench Planning Summary Report

Use this report to view potential successors for specific positions.

This is the start of your concept.

Contents of the Bench Planning Summary Report

Use this report to view potential successors for specific positions.

Options to Filter Report Results

Select from these options to narrow report results.

Field	Description
Select an Employee	Click **Select Employee** and enter a first name, last name, or email address in the **Search** field, OR select a manager from the **Manager** field, then click **Search** to narrow results. Click the add icon ✚ to select the employee(s) to include, and click **Confirm Selection** when done.
Nominated Job Title	Select the job for which an employee has been nominated.
Division	Select a division of your company to narrow results by division.
Select Manager	Click **Select Manager** and enter a first name, last name, or email address in the **Search** field, OR select a manager from the **Manager** field, then click **Search** to narrow results. Click the add icon ✚ to select the manager(s) to include, and click **Confirm Selection** when done.
Readiness	Select the time period that best describes when the employee will be ready to assume the nominated job.
Relocation Preferences	Select the employee's preferred location if relocation is required for the new position.
9 Box Placement	Select a value that corresponds with an employee's placement on the 9 box grid.

When finished selecting filter options, click **Search** to run the report.

Contents of the Report

This report shows employees who have been nominated as potential successors for a job. Results display on screen and depend on filters selected. Results include comments made when the employee was nominated, and comments made by the employee regarding his or her availability.

Actions

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.
Report	Click this button to return to the previous Reports menu screen.

Gap Analysis: Jobs Report

Use this report to review the skills and competencies required of a job and the numbers of employees who match those criteria.

Contents of the Gap Analysis: Jobs Report

Use this report to review the skills and competencies required of the job and the numbers of employees who match those criteria.

Options to Filter Report Results

Select from these options to narrow report results.

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.
Job Title	Select or enter the type of job to include in report results.
Status	Select an FLSA Status for filtering, such as Exempt or Non-Exempt.
Key Job	Select **Yes** to include only jobs marked as key or critical to the company. Select **No** to include all jobs that meet the other criteria.

When finished selecting filter options, click **Search** to run the report.

Contents of the Report

The Gap Analysis Job report shows the skills and competencies of the job(s) selected compared to the employees in the organization. It includes the number of employees who possess the skill/ competency and the number represented as a percentage of the total number of employees. This report can help determine the training opportunities to aid employee growth within your organization.

Actions

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.

Gap Analysis Employee Report

Use this report to show the skills and competencies of a selected employee compared to the job under consideration.

Contents of the Gap Analysis: Employee Report

Use this report to show the skills and competencies of a selected employee compared to the job under consideration.

Options to Filter Report Results

Field	Description
Job Title	Select or enter the type of job to include in report results.
Employee's Last Name	Enter the employee's last name.

When finished, click **Search**. Select the appropriate options returned in the results and click **Generate** to run the report.

Contents of the Report

The Gap Analysis report shows the skills and competencies of the selected employee compared to the job that they are being considered for nomination to succession. It can help you determine the development needs of the employee. The information is displayed side by side for easy comparison. A red **No** or green **Yes** will show in the**Gap** column, confirming an existing gap.

Actions

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.

Average Performance Rating by Tenure Report

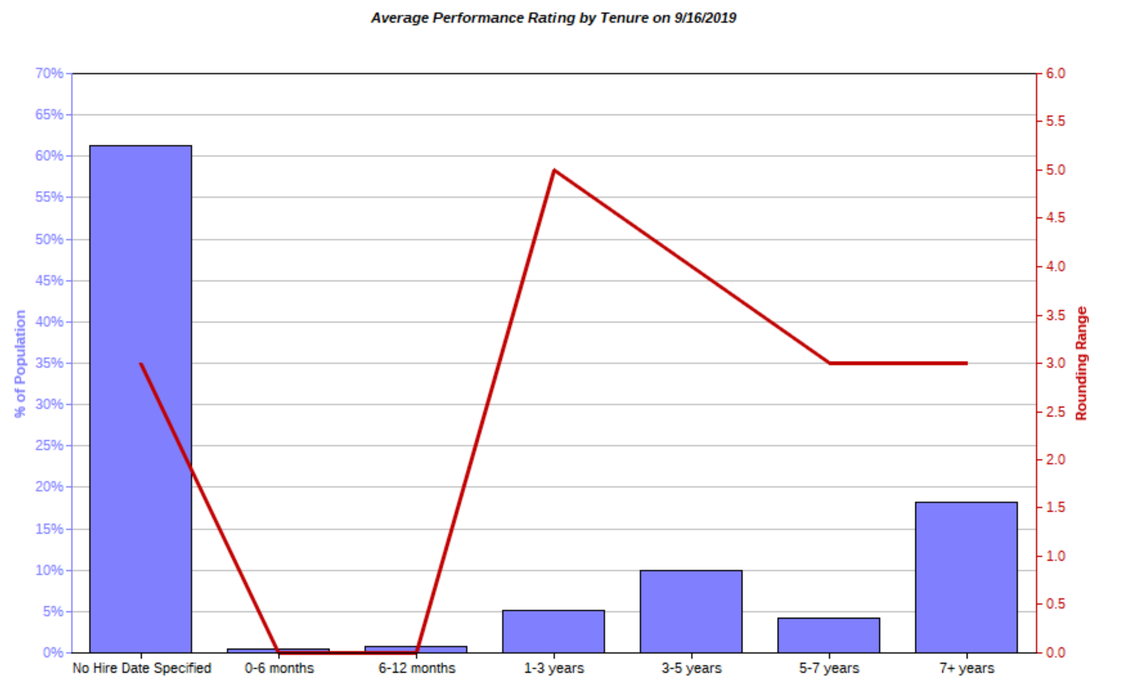
Use this report to view a graphical representation of the percentage of employees in specific tenure groups and the average performance scores for each tenure group.

Contents of the Average Performance Rating by Tenure Report

Use this report to view a graphical representation of the percentage of employees in specific tenure groups and the average performance scores for each tenure group.

Sample Average Performance Rating by Tenure Report

Use the buttons at the top right to download the report as a PDF file or to return to the Career Planning Reports screen.



Actions

Field	Description
Download as PDF	Click this button to save a copy of the report in .PDF format.
Report	Click this button to return to the previous Reports menu screen.

Career Development by Competency Performance Report

Use this report to view employee scores on a specific competency and the employee involvement on a project team, an active career path, as a mentor, or on a succession plan, to determine their participation.

Contents of the Career Development by Competency Performance Report

Use this report to view employee scores on a specific competency and the employee involvement on a project team, an active career path, as a mentor, or on a succession plan, to determine their participation.

Options to Filter Report Results

Select from these options to narrow report results.

Field	Description
Rating	Select a performance rating to use to filter report results.
Competencies	Select a competency to include on the report.
Order By	Choose how to organize the results, by Manager, Location or Company/ Division.

When finished, click **Search** to run the report.

Contents of the Report

This report lists employee scores on a specific competency, and indicates various types of participation, such as employee involvement on a project team, on an active career path, as a mentor, or on a succession plan.

Actions

Field	Description
Download as PDF	Click this button to save a copy of the report in .PDF format.

Career Path Participants with Curricula

Use this report to view career path participants for the selected job and review the curriculum participation and certifications for each participant.

Career Path Participants With Curricula

Use this report to view the career path participants for the selected job and review the curriculum participation and certifications for each participant.

Options to Filter Report Results

Field	Description
Job Title	Select or enter the type of job to include in report results.

When finished, click**Search** to run the report.

Contents of the Report

Actions

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.
Report	Click this button to return to the previous Reports menu screen.

Employees Without a Career Path Report

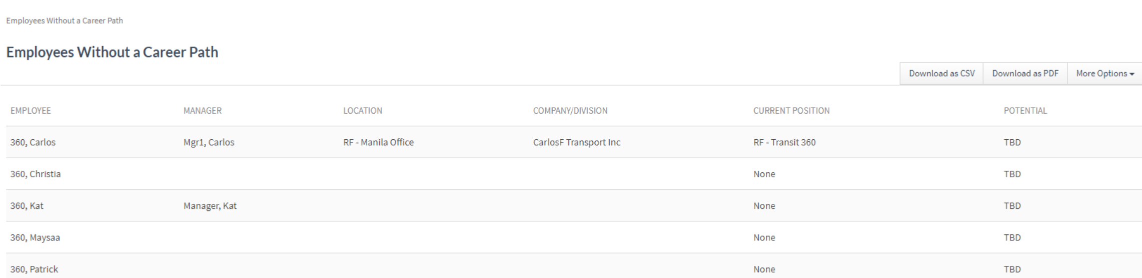
Use this report to see a list of employees who have no career path defined.

Contents of the Employees Without a Career Path Report

Use this report to see a list of employees who have no career path defined.

Sample Employees Without a Career Path Report

A Career path is a roadmap to a higher position within the organization, made up of different positions that you will need to occupy to attain your ultimate job. This report lists employees with no career path.


Employees Without a Career Path

Employees Without a Career Path

Download as CSV | Download as PDF | More Options

EMPLOYEE	MANAGER	LOCATION	COMPANY/DIVISION	CURRENT POSITION	POTENTIAL
360, Carlos	Mgr1, Carlos	RF - Manila Office	CarlosF Transport Inc	RF - Transit 360	TBD
360, Christia				None	TBD
360, Kat	Manager, Kat			None	TBD
360, Maysaa				None	TBD
360, Patrick				None	TBD

Actions

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.

Field	Description
Report	Click this button to return to the previous Reports menu screen.

Potential Distribution Report

Use this report to view the number of employees in each Potential Rating group and the group's percentage of the total employees

Filter the results of the report by Company, Division (if applicable), Job Title, Status, and Potential.

Contents of the Potential Distribution Report

Use this report to view the number of employees in each Potential Rating group and the group's percentage of the total employees.

Options to Filter Report Results

Select from the following options to filter report results.

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.
Job Title	Select or enter the type of job to include in report results.
Status	Select an FLSA Status for filtering, such as Exempt or Non-Exempt.
Potential	Select a Potential Rating value to use to filter report results. Potential Rating values are established by an Administrator.

When finished, click **Search** to run the report.

Contents of the Report

This report lists the number of employees in each Potential Rating group and the group's percentage of the total employees.

Field	Description
Report	Click this button to return to the previous Reports menu screen.

Succession Planning Reports

Managers use these reports to help them plan for how to promote employees from the talent pool when a key role is vacated.

Available Actions

You can complete the following actions on this report:

- To view the purpose of any report, hover over its name.
- If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.
- To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

People in Key Positions Report

Use this report to view a list of employees marked as crucial to your organization.

Contents of the People in Key Positions Report

Use this report to view a list of employees marked as crucial to your organization.

Options to Filter Report Results

Select options to filter report results.

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.
Job Title	Select or enter the type of job to include in report results.
Employee	Enter all or part of an employee's name.
Status	Select an FLSA Status for filtering, such as Exempt or Non-Exempt.

When finished selecting filter criteria, click **Search** to run the report.

Contents of the Report

This report shows the employees who have been deemed as Key Employees. Key employees are the people that ensure your organization is on track, meeting goals, and growing according to plan. The report shows the Location, Job Title, and Professional Development Guide for each key employee listed.

Actions

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Report	Click this button to return to the previous Reports menu screen.

Key Positions Report

Use this report to view details, such as position title and location, for key people in the organization.

Contents of the Key Positions Report

Use this report to view information, such as Company and Job Title, related to your organization's highest achievers.

Options to Filter Report Results

Field	Description
Company	Select the company to use as a filter. In some cases, after selecting a company, a **Division**, **Location**, and/or **Department** field also display. Select options for these fields to narrow results further.

When finished selecting filter options, click **Search** to run the report.

Contents of the Report

This report shows the **Location**, **Company/Division**, **Executive**, **Job Title**, **Position Code**, the **Incumbent** to the position, and the **Position Tenure** related to the Key Positions in the organization, those people who direct the company, facilitate daily business, and plan for the organization's future. The people filling key positions need to be among the highest achievers in your organization.

Actions

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.
Report	Click this button to return to the previous Reports menu screen.

Training Required vs Training Accomplished Report

Use this report to view the employees included in the selected Succession Plan, and the enrollment date(s) for any training required for the job.

Contents of the Training Required vs Training Accomplished Report

Use this report to view the employees included in the selected Succession Plan, and the enrollment date(s) for any training required for the job.

Options to Filter Report Results

Field	Description
Succession Plan	Select the succession plan to include on the report.

Contents of the Report

This report lists the individuals in the selected succession plan and shows the completion date of the training required for the employees who are slated to move into positions should key positions be vacated.

The results are organized into three groups, the **Incumbent(s)**, **Plan Participants** and the employees **In [the] Talent Pool**. The required training is shown in columns, and the completion date is displayed in the column if the individual has completed the course. N/A indicates the course has not been completed.

Successors Course Completion Report

Use this report to view participants in the selected succession plan and the completion date of the selected course(s).

Successors Course Completion Report

Use this report to view participants in the selected succession plan and the completion date of the selected course(s).

Options to Filter Report Results

Field	Description
Courses	Select **Course(s)** from the list to filter report results. To select more than one course, press and hold the CTRL key on the keyboard while clicking your selections.
Course Keyword	Enter part or all of a course name.

Field	Description
Skills	Select one or more skills that would be taught in the course(s) you want to include on the report. To select multiple skills, hold down the CTRL key while making selections.
Competencies	Select one or more competencies that would be taught in the course(s) you want to include on the report. To select multiple competencies, hold down the CTRL key while making selections.
Succession Plan	Select the succession plan to include on the report.

Contents of the Report

Report results are categorized in three groups, the **Incumbent(s)**, **Plan Participants** and the employees **In [the] Talent Pool**. The selected **Course(s)** are shown in columns, and the completion date is displayed in the course column if the individual has completed the course. If not completed, an N/A will be displayed.

Available Actions

You can complete the following actions after running this report:

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.
Report	Click this button to return to the previous Reports menu screen.

Succession Plans Without Successors Report

Use this report to view a list of succession plans without designated successors.

Contents of the Succession Plans Without Successors Report

Use this report to view a list of succession plans without designated successors.

Contents of the Report

The jobs shown on this report are currently without successors. Jobs are listed by Location, Job Family, Job Title, Job Code, whether the job is a Key Job, and the Plan Owner responsible for creating the succession plan. Participants who are nominated for a succession plan are put in a Talent Pool until approved by the plan owner. The **Has Talent Pool** column displays a Yes or No to indicate if there are participants awaiting approval.

Available Actions

You can complete the following actions after running this report:

Field	Description
Download as CSV	Click this button to save a copy of the report in .CSV (comma-separated values) format.
Download as PDF	Click this button to save a copy of the report in .PDF format.
Download as XLS	Click this button to save a copy of the report in .XLS (Microsoft Excel) format.
Report	Click this button to return to the previous Reports menu screen.

Your Organization Reports

The reports are categorized into blocks. When you hover over each link, a description of the report's purpose displays.

To **search** for a specific report, enter keywords in the search field. The system searches on the report's name.

To **run** a report, click on its name.

Positions

Use this section to generate data about the positions within your organization.

To view the purpose of any report, hover over its name.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

Vacant Open Positions (Days) Report

Use this report to list the open positions in the selected Company/Division or Location along with the position code and current number of days that position has been vacant.

Turnover

Use this section to generate data about the employees who leave your company and are replaced by new employees.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Company/Division Turnover Trends Report

Use this report to generate a graphical representation of the turnover percentage of voluntary and involuntary terminations.

Employee Profiles Report

Use this report to generate a listing of employee Names, Location, Job Titles, Company/Division information, Status, and Managers.

Job Title Turnover Trends Report

Use this graphical report to display the turnover by the selected Job Title during the date range entered.

The date filters allow you to limit the results within the specified date range.

Manager Turnover Trends Report

Use this graphical report to display turnover data for a specific Manager over the selected date range.

The resulting bar graph displays the number of involuntary turnovers versus voluntary turnovers.

Turnover - By Company/Division Report

Use this graphical report to display the turnover rate in the Company/Division selected during the date range entered.

Turnover - By Job Title Report

Use this graphical report to display the turnover rate according to the selected Job Title during the selected date range.

Turnover - By Location Report

Use this graphical report to display the turnover rate according to the selected Location during the selected date range.

Salary

Use this section to generate data regarding employee compensation.

To view the purpose of any report, hover over its name.

To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.

Salary Range By Salary Grade Report

Use this graphical report to display the Salary Grade scaled from Low to High versus the Actual Low and High salary range for the selected Salary Grade.

Custom Reports

Use this section to view and create custom reports.

Click **Custom Reports** to view the reports that have been created for the module or to create new custom reports.

Core HR Reports

Use these reports to monitor company compliance with various standards and requirements.

Available Actions

You can complete the following actions on this report:

- To view the purpose of any report, hover over its name.
- If your available reports are numerous, search for a specific report by entering keywords, such as all or part of the report name, in the **Search** field. Talent Management searches report names for the keywords and returns a list of matches.
- To run a report, click the report name, enter filter options, if necessary, and click the action button (Filter/Search/Run/Generate). In some cases, clicking on the report name runs the report.

EEO-1 Report

Administrators run this report to display the gender and ethnicity count for each EEOC Job category, to help monitor their firm's compliance.

Contents of the EEO-1 Report

Administrators run this report to display the gender and ethnicity count for each EEOC Job category, to help monitor their firm's compliance.

Options to Filter Report Results

Field	Description
From	Enter the start date for data to include on the report.
To	Enter the end date for data to include on the report.
Location	Select the location for which you want to run the report.

Contents of the Report

This report includes the gender and ethnicity count for each EEOC Job category. The report also shows total hours worked and salary information in a separate table, as this information is mandatory for Component 2 of the EEO-1 report. DTM does not currently calculate pay or track total hours worked, so data will not be populated into this second table, but blank fields have been added to the report so users can add data manually, as needed.

Actions

Field	Description
Download as PDF	Click this button to save a copy of the report in .PDF format.
Filter Again	Click to return to the EEO-1 Report filter screen.

Vets-4212 Report

Administrators use this report to view employees and new hires who identified themselves as protected veterans, and to monitor your company's compliance.

Contents of the VETS-4212 Report

Administrators use this report to view employees and new hires who identified themselves as protected veterans, and to monitor your company's compliance.

Options to Filter Report Results

Select filter criteria to narrow report results.

Field	Description
Twelve Month Period Ending	Enter the end date for the period that includes the data you want to include on the report.
Types of Reporting Organization	Select one or more options to include in report results: **Prime Contractor** and/or **Subcontractor**
Type of Form	▪ **Single Establishment** ▪ **Multiple Establishment-Headquarters** ▪ **Multiple Establishment-Hiring Location** ▪ **Multiple Establishment-State Consolidated**

Company Identification Information

Field	Description
Company No	Enter the unique company identifier.
Name of Parent Company	Enter the name of the parent company.
Address (Number and Street)	Enter the street address and suite number, if applicable.
City	Enter the city name.
County	Enter the County name.
ST/PR	Select a State or Province from the drop-down list.
ZIP/Postal Code	Enter the ZIP or postal code.
Name of Company Contact	Click Search Employee and select the employee to specify as the contact.
Telephone for Contact	Enter the best phone number to reach the company contact.
Hiring Location	Select the location within your organization where the employee was hired.

Field	Description
Name of Hiring Location	Enter the Company name at the hiring location.
County	Enter the County name.
NAICS	Enter the six digit NAICS code that applies to the hiring location for which the report is filed. If the hiring location does not have an NAICS code, enter the code for the parent company.
DUNS	Enter the nine digit Dun and Bradstreet unique identification number that applies to the hiring location for which the report is filed. If the hiring location does not have a DUNS number, enter the DUNS number for the parent company. If no number is associated with the parent company, or the number cannot be found, leave this field blank.
Employer ID (IRS Tax No.)	Enter the nine digit Dun and Bradstreet unique identification number that applies to the hiring location for which the report is filed. If the hiring location does not have a DUNS number, enter the DUNS number for the parent company. If no number is associated with the parent company, or the number cannot be found, leave this field blank.
Submit	Click to run the report.

Field	Description
Cancel	Click **Cancel** to return to the Reports screen.

Contents of the Report

This report includes the total number of permanent employees and new hires who are protected veterans, listed by EEO job category.

Actions

Field	Description
Download as PDF	Click this button to save a copy of the report in .PDF format.
Filter Again	Click to return to the Vets-4212 Filter Options screen.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com