



# REPORTS MODULE

## INSTRUCTION MANUAL



OTYS Recruiting Technology





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# 1 | INTRODUCTION

## 1.1 ABOUT THE REPORTS MODULE

Information is of paramount importance to your organisation. How can you give your business direction if you have no information about, for example, numbers of open vacancies, new candidates, or which source or campaign generates the most candidates? With this data you can monitor your operations and align your policy and choices accordingly. The good news? This data is already available in OTYS and the Reports module is the tool to uncover and analyse it.

## 1.2 PURPOSE OF THIS INSTRUCTION

The purpose of this instruction is to introduce you to the Reports module and show you how to create, set and combine reports. We will also show you how to export reports or use them on your OTYS Dashboard. After reading these instructions, you will be able to create and set reports to your information needs.

## 1.3 INSTRUCTION STRUCTURE

This instruction manual starts with an introductory chapter that describes the added value of the Reports module. Next, the functionality of the module is discussed in detail.

Here we explain (how to):

- The overview screen of the module
- Create new report groups and reports
- Set and export reports

## 2 | OVERVIEW OF THE MODULE

In this chapter we discuss the overview page and navigation within the Reports module.

The overview page is the first page you will see when you open the module. The overview is laid out as follows:

In the left menu is the overview of reports, displayed in a group structure. Clicking on the '+' or '-' symbol in front of the report group title will either open or close the report group, making all the report pages in this folder either visible or invisible.

By clicking on a report group or report, it will be opened on the right side of your screen. Here you can see all the details of the selected report.

Use the bar in the top right corner to choose all sorts of settings for the report, enabling you to get the exact information you need. For example, you can choose which report you want to see on the basis of the linked tables. Read more about this in the next chapter. In the top bar you can also choose the time period for the report and the manner of display.

At the top of the page you will find the 'Plus' icon and the 'Combined report matrix' icon. With the 'Plus' icon, it is possible to create a new report group quickly. With the 'Combined report matrix' icon, it is possible to create a combined matrix of different reports. More on these functions can be found in the next chapter.

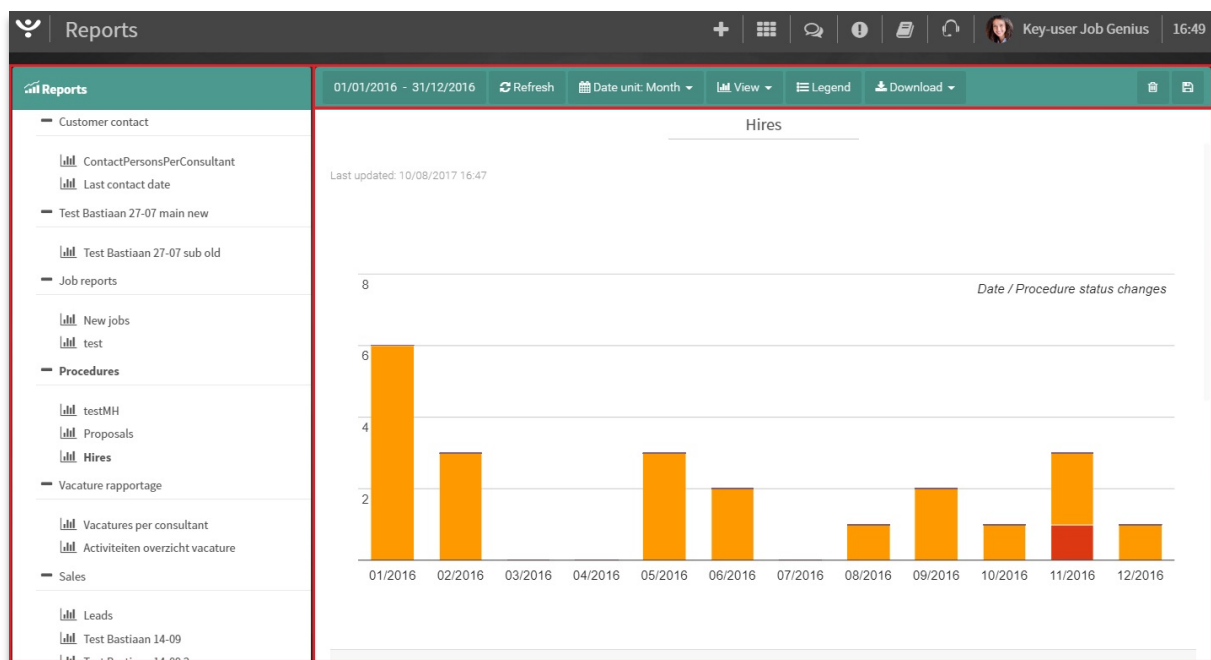


Fig. 1 – Screen overview of the Reports module

## 3 | USE THE REPORTS MODULE

In this chapter we show you how to create report groups and reports, how to link the right tables to a report, and how to set up the report in such a way that you can see the data you need.

### 3.1 CREATE A NEW REPORT GROUP

When the Reports module is opened for the first time it is not yet properly set up. Before you can create reports, you must first create a group which will then appear in the menu tree on the left. To create a new report group, click at the top of the screen on the '+' icon, and a pop-up window will appear. Here you can specify the name of the group. Then click 'Save'. The newly created group will appear in the left menu tree.

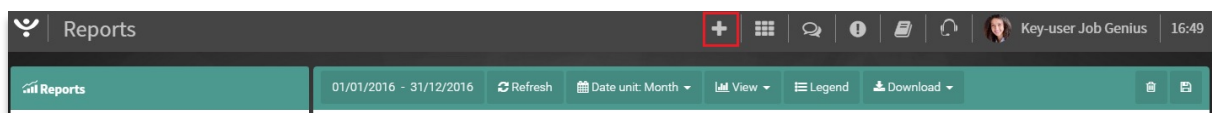


Fig. 2 – Create new report group

#### 3.1.1 SELECT LINKED TABLES FOR THE REPORTS

After creating a report group you can select linked tables at the top of your screen. This choice determines which data you will use from the underlying report pages. For example, to create a report that combines vacancies and candidates, choose 'Vacancies' and 'Candidates'. Follow these steps:

- Click in the top right corner of the generated report group on the field under 'Linked tables'.
- Select multiple tables from the drop-down menu. After selection a blue tick will appear behind the name of the table.
- Click in the top right corner of your screen on 'Save'.

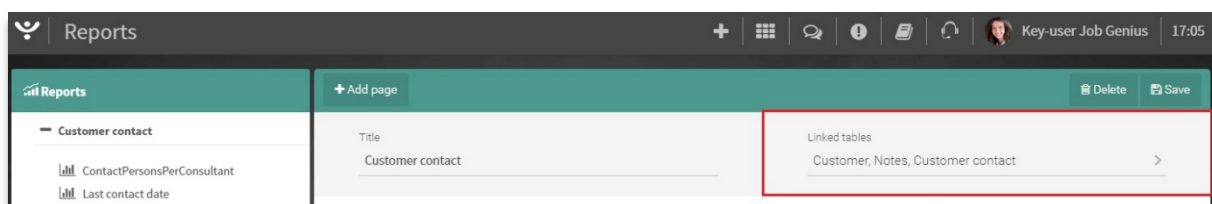


Fig. 3 – Select linked tables for your report

### 3.2 CREATE A NEW REPORT PAGE

Once you have created a report group and linked one or more tables, you can create specific report pages. Follow these steps:

- Click in the top left corner of the created report group on '+ Add page'.
- Enter a name in the screen that will appear.
- Click on 'Add'.

A new page has been created and will appear in the appropriate report group in the left menu.

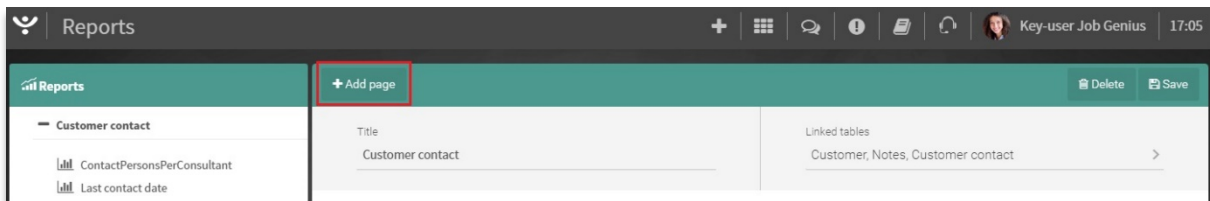


Fig. 4 – Create new report page

### 3.2.1 SET UP REPORT PAGE

After the report page is created it must be set up to ensure that the correct information is displayed. First, after opening the report page you must choose from the previously selected linked tables at the top.

Once the correct table is selected on the report page, new options will become available:

- Module: this allows you to retrieve the specific data in the selected table. In the example of a linked 'Vacancies' table that would be: 'Comments by source'.
- Consultant: here you can select one or more consultants that require reporting. There is also the option to select all, or to only display the data of the user that is logged in.

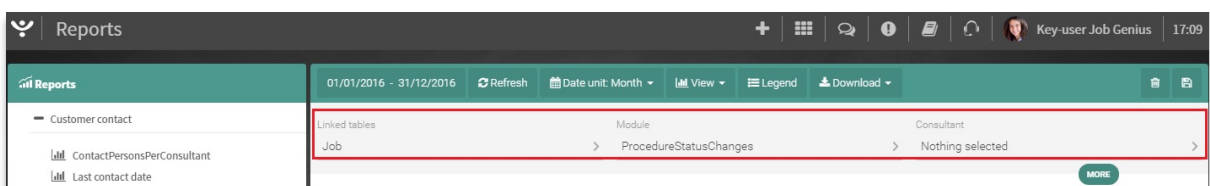


Fig. 5 – Set 'Linked table', 'Module' and 'Consultant'

If you then click the 'More' button, a menu will fold out with additional options that are specific to the selected table and module. For example, this allows you to apply additional filters in 'Vacancies', 'Relations' and 'Contacts' in respect of 'Status', 'Branch' and 'Industry' or a specific vacancy. The table 'Candidates' gives you additional filter options such as 'Employment contract' and 'Education level'.

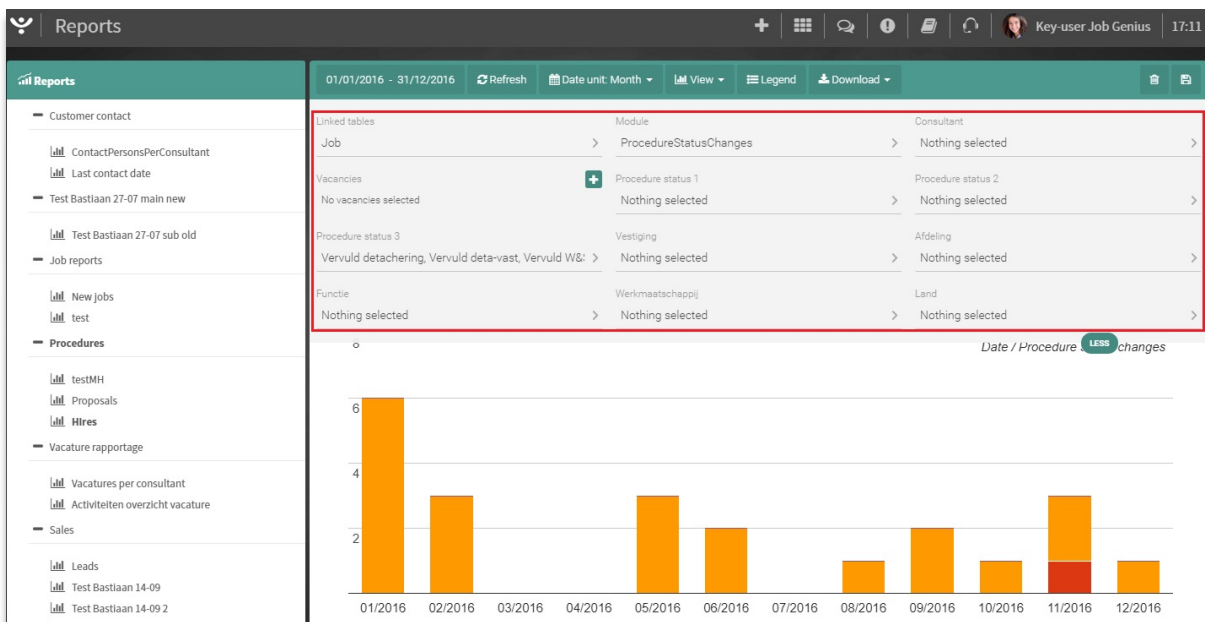


Fig. 6 – Set up report with the options under the 'More' button

After selecting the above options you can click 'Refresh' at the top of your screen to apply the changes to the report. Please read the next chapter to learn how to adjust the view of the graph to your liking.

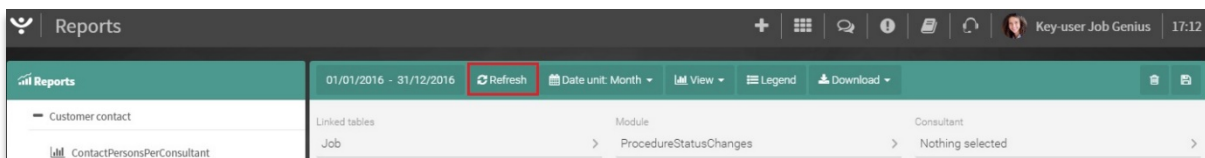


Fig. 7 – Refresh report

### 3.2.2 SET THE CORRECT VIEW

After you have set up your report with the right data according to the aforementioned options, you can set the view. Any change made in the view is immediately shown on the screen.

In the green bar at the top of your screen you will find several options:

- Period
  - Current period  
Under this option you can choose between the period types 'Week', 'Month', 'Quarter' and 'Year' to select, for example, the current month.
  - Previous period  
Here too, you can choose between the period types 'Week', 'Month', 'Quarter' and 'Year' to select, for example, the previous month. The option 'Month' will display data from the last full month.



- Last x days  
Use this option to show information from a certain period, for example from the last 30 days.
- Adjusted period  
Use this option to specify a specific start and end date using the calendar.
- Date unit  
In the drop-down menu, select 'Day', 'Week', 'Month' or 'Year' to determine the level of detail of your graph. Note that the graph can give a distorted picture, for example when you select 'Month' as the date unit, as the period selection also includes half months.
- View  
Select from the drop-down menu the graph type that best suits the data you want to show:
  - **A line graph** in which the values shown are connected with a line. This is particularly suitable to show how value changes over a longer period of time.
  - **A column chart** in which the values are displayed in columns. A column chart is especially suitable for displaying data changes over a certain period of time or for the comparison of different variables.
  - **A stacked column chart** is similar to the regular column chart with the difference that the values are in one column, and together make up 100% of all the data from the selection.
  - **A bar graph** in which the frequency distribution of data is displayed. Bars indicate the relative frequency of the possible values, and thus give an impression of the probability mass function from which the data originates.
  - **A stacked bar graph** is similar to the ordinary bar graph with the difference that the values are in one column, and together make up 100% of all the data from the selection.
  - **A pie chart** where the size of the variables that represent a data set is displayed, in proportion to the sum of the variables. The triangular wedges that you see in a pie chart represent the categories. The size of the wedge itself represents the percentage of the category in relation to the total.
- Legend  
Click on the 'Legend' button to enable and disable the legend for your graph.

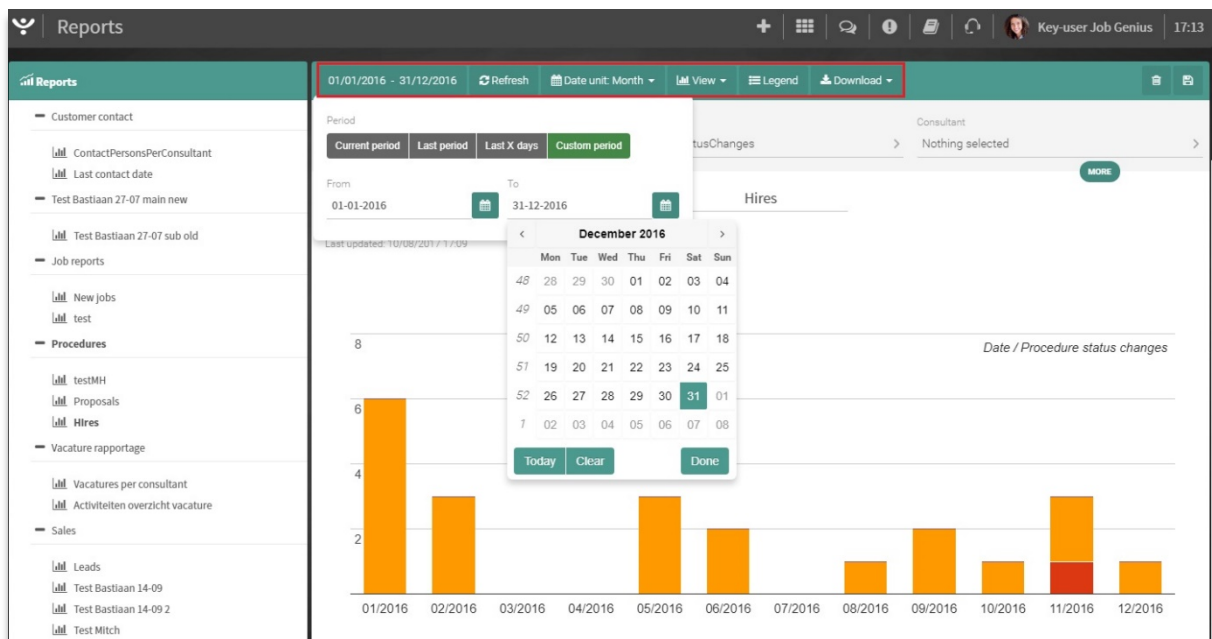


Fig. 8 – Options for setting the view of your report

If there are several different dimensions in one graph and you are using the format of a line graph, you will see multiple lines in one graph. Use the green buttons above the graph to hide one or more lines temporarily. For example, if you select 'Vacancies' and 'Views' as dimensions for this graph, it may well be that the graph is difficult to read because, for example, you only have a dozen vacancies, but thousands of views. As a result, the line of the vacancies will appear to lie flat on the bottom of the graph. In a column chart this obviously applies to the columns. With the green button you can temporarily hide the line of the vacancies.

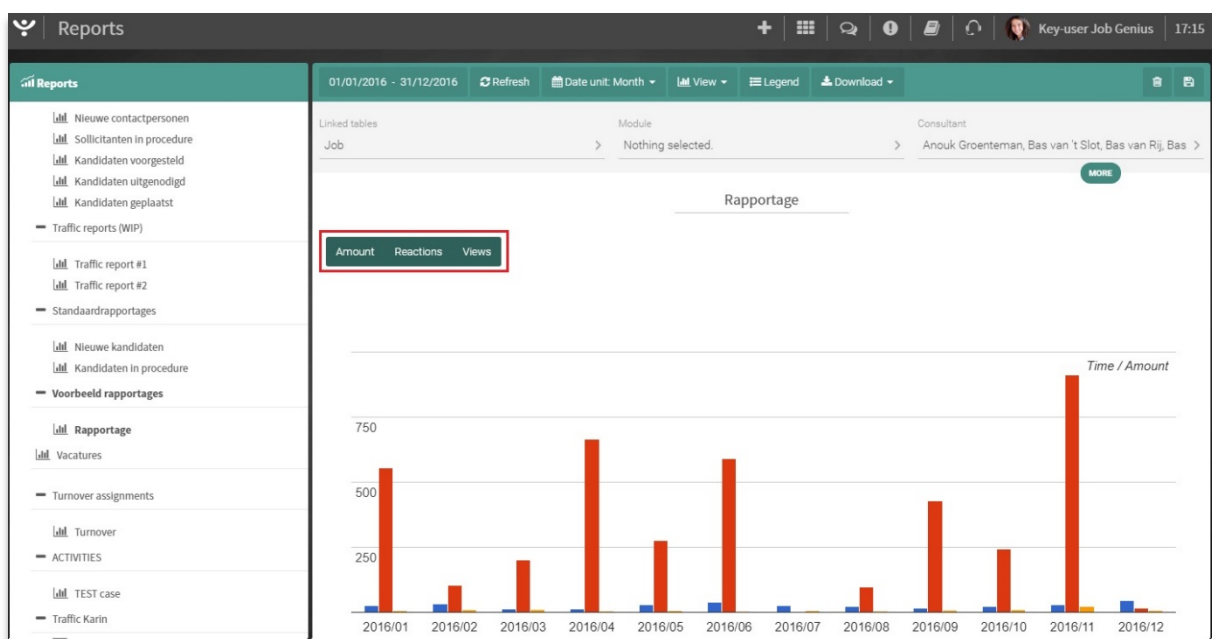


Fig. 9 – Hide/display data in your graph

### 3.3 CLICK THROUGH IN A REPORT

It is possible to click through from the Reports module to specific data displayed in the graph. To do this, hover over the graph with your cursor. If you created a column chart and hover over it with the cursor, you will see details in a tooltip, such as the exact number represented by the column. By clicking on the column you can go to the underlying table to view the data. It is also possible to click directly on a graph with vacancy information to get to the actual vacancy. This will open in a new tab.

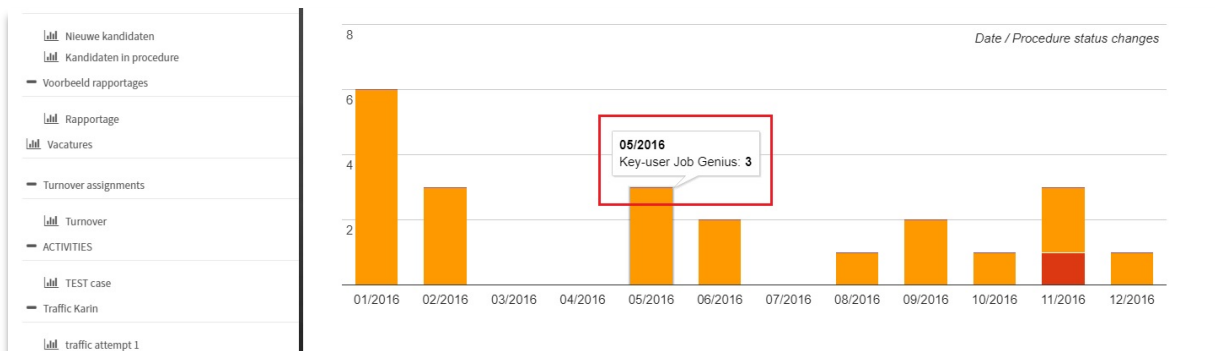


Fig. 10 – Click on a column in the graph to consult the underlying table

### 3.4 EXPORT YOUR REPORTS

If you want to use your report outside of the OTYS system, it is easy to export. In the green bar at the top you will find the 'Download' button. In the drop-down menu you can choose between several options:

- **Download CSV**  
Use this option to download your report as a CSV file. This will export the underlying table of the report. Useful if, for example, you want to continue working on the report in Excel. The graphic view of your report cannot be exported as the CSV file format does not support it.
- **Print**  
Clicking will open the print window. You can now print the chart.
- **Download image**  
Select this option if you want to display your downloaded graph as a PNG image. Useful if you just want to share the graphic view of your report.

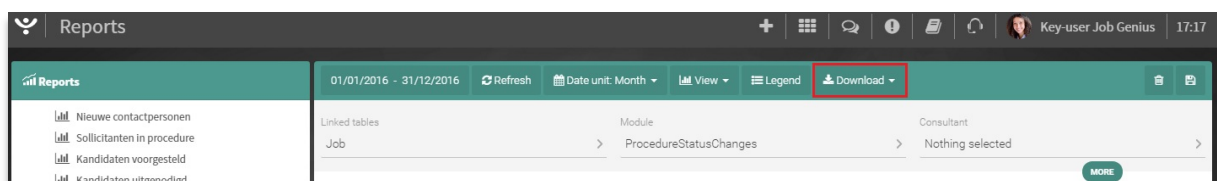


Fig. 11 – Download/export the report

### 3.5 GENERATE COMBINED REPORT MATRIX

At the top of your screen, next to the '+' symbol, you will find the button to generate a combined report matrix. This allows you to create a combined table made up of all previous reports. For example, you can display the totals of the reports 'Intakes', 'Proposed candidates' and 'Assigned candidates' next to each other in one table. You can also set a period, consultants or business unit.

### 3.6 REPORT WIDGETS ON YOUR OTYS DASHBOARDS

Through various report widgets, it is possible to display your reports on your OTYS dashboard to ensure that you see them every morning as you log in, for instance. Alternatively, use the report widgets on the dashboard to narrowcast to one or multiple screens on your premises to share, for example, KPIs with colleagues. Please read the Dashboard module instruction manual to learn how to set the report widgets on your dashboard.