Reports and Analytics

Revision history

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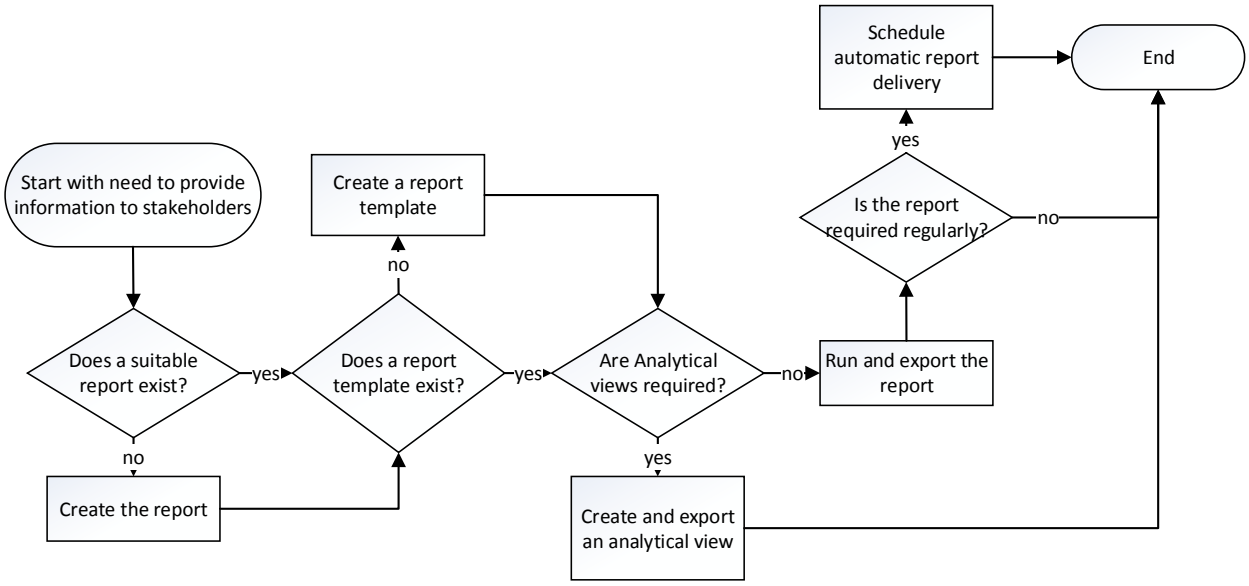
Introduction

This guide shows you how to work with CHRS Recruiting system reports and analytics.

The Campus Reports Administrator is a person whose job is specifically to handle reporting and analytics for their campus. This guide is written specifically for the Campus Reports Administrator role.

Process diagram



- Start with a need to provide information to stakeholders.
- Determine whether a suitable report exists. If the report does not exist, create one. If the required fields are not in the data view, reach out to your campus administrator for assistance.
- Determine whether a report template exists. If not, create a report template and attach it to the report.
- Determine whether analytical views are required.
    - If so, create and export a PDF of the analytical view.
    - If not, run and export the report.
- Determine whether the report is required on a regular, ongoing basis. If so, schedule the report.

What you will do

- Identify the responsibilities of the Campus Reports Administrator
- Find, view, and export reports
- Use reports provided by CO
- Make a report a favorite
- Create a report
- Create a report template
- Schedule reports
- Create analytics views

Definitions

Term	Definition
Campus Reports Administrator	Campus Reports Administrator is a person whose job is specifically to handle reporting and analytics for their campus.
Data View	A view of system data that forms the basis of a report. When you create a report, you must specify the data view to report on. The data view that you select determines the fields that you can see when you build the report. Examples of data views: Jobs(Live), Offers(Live), and Applications (Live).
Field	A unique piece of information that you can report on. Examples include job number, job title, and applicant name. Fields are represented as columns in a report.
Report Template	A Microsoft Excel spreadsheet that has been configured to manipulate the raw data of a report to make the data easily viewed. Report templates are stored in the document library.

Identify the responsibilities of the Campus Reports Administrator

Campus Reports Administrators do the following activities:

- Generate reports and provide them to stakeholders.
- Set up scheduled reports for their stakeholders.
- Generate analytical reports and provide them to stakeholders.

Why does this role exist?

Reports provide access to system-wide information that includes personally identifiable information about applicants and employees and other sensitive information. Access to reports and analytics is therefore limited to the role of the Campus Reports Administrator to prevent unauthorized access to this information.

As a Campus Reports Administrator, you acknowledge and accept a responsibility for handling sensitive information.

Responsibilities with respect to sensitive data

The following information from *ICSUAM – 8000* pertains to your responsibilities with respect to sensitive data.

All users are expected to employ security practices appropriate to their responsibilities and roles. Users who access Level 1 or Level 2 data as defined in the CSU Data Classification Standard must sign an approved system-wide confidentiality (non-disclosure) agreement.

To comply with state and federal laws and regulations, campuses may not collect personally identifiable information unless the need for it has been clearly established.

Where such information is collected:

- *The campus will use reasonable efforts to ensure that personally identifiable information is adequately protected from unauthorized disclosure.*
- *The campus shall store personally identifiable information only when it is appropriate and relevant to the purpose for which it has been collected.*

Guidelines when handling sensitive data

- Never send Level 1 or personal information through email. If you need to transfer the information to someone who is authorized to view it, put the information in a secure location to which the other person has access.
- Secure any reports that you create so that only authorized users have access.

What happens next

If you understand and accept the responsibilities of your role of Campus Reports Administrator, then you can begin running reports and analytics.

Related documents

Analytics and reporting

Report builder

ICSUAM - 8000

Find, view, and export reports

CHRS Recruiting provides several premade reports, which you can find and run. After you find and run a report, you can export the report to plaintext or Excel spreadsheet format for easier viewing. In Excel, you can continue to manipulate the data in ways that are not currently possible in CHRS Recruiting.

Before you begin, it is highly recommended that you review the tutorial videos in the PageUp Knowledge Portal.

When to find, run, and export reports

Run and export reports when campus stakeholders need the information.

Prerequisites and assumptions

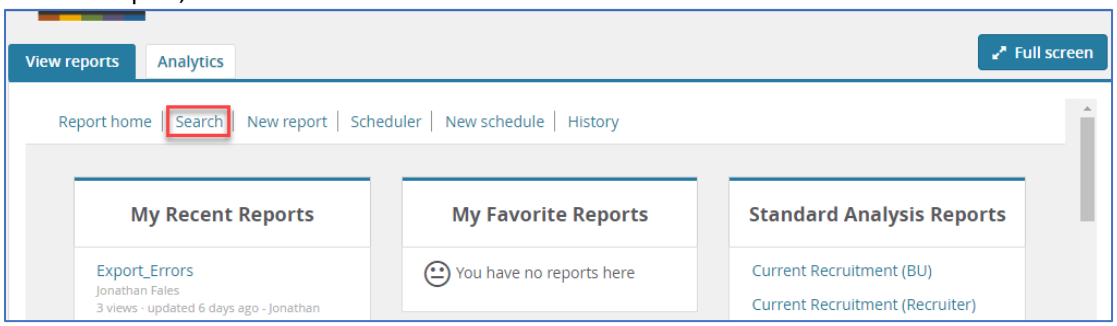
- You are a Campus Reports Administrator.
- The report that you need to run already exists.

How to find, view, and export reports

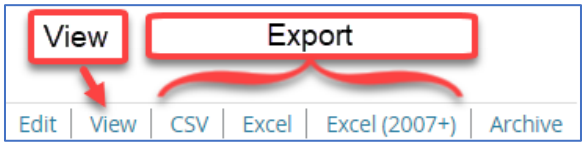
1. From the top navigation bar of CHRS Recruiting, click **Reports**.

The **Report home** page opens, displaying several categories of reports, including Recent Reports, Favorite Reports, and Standard Analysis Reports.

2. To find a report, click **Search**.



3. On the **Report Search** page, use the following fields to find your report.
   - **Title** – The title of the report.
   - **Reporting on** – The Data view of the report.
   - **Report owner** – The creator or owner of the report.
   - **Status** – Whether the report is active or archived.
4. Click **View** to view the report, or click **CSV**, **Excel**, or **Excel (2007+)** to export the report in the chosen format.



5. After you export the report, click **Download**.

Guidelines when using reports

CHRS Recruiting system spans the entire CSU system. In your role, you have access to reporting data from other campuses. Therefore, use the following guidelines when working with reports.

- When you create reports or analytics always filter your data to be specific to your own campus.
- Do not edit other campus's reports (unless you are making a copy for your own campus).
- Adhere to the report naming convention. Use your two-letter campus prefix followed by a dash.
- Use the **Search** function to find reports that you want to archive.

What happens next

- You can manipulate the information with Excel.
- You put the file in a secure location to provide your stakeholders.

Related documents

Reporting

Analytics video tutorials

Use reports provided by CO

The Chancellor's Office (CO) has provided some reports that are most useful for campuses. These reports are:

- Pending Approvals reports – Three reports provide lists of job requisitions, position descriptions, and offers that are awaiting approval.
- New Hire report – This report provides information about new employees that must be entered into PeopleSoft.
- EEO Diversity report – This report is available to Compliance Panel Facilitators and is accessible through the job requisition.

Before you run each report, you must make a copy of the report that is filtered for your campus.

When to use reports provided by CO

- It is useful to schedule Pending Approval reports to send updates to HR/FA representatives and hiring authorities on a regular basis.
- Provide new hire reports on a regular basis to the persons who are responsible for entering new employee information into PeopleSoft.

Prerequisites and assumptions

- You are the Campus Reports Administrator.
- You know how to find reports.

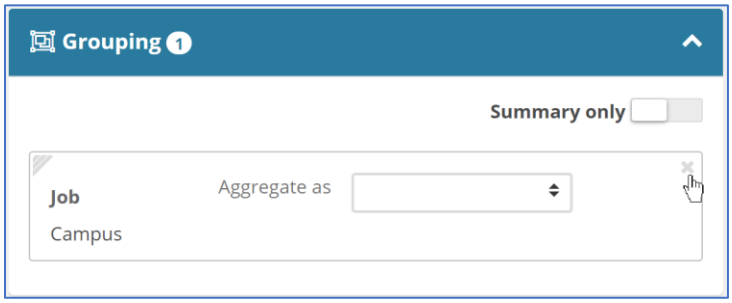
How to use reports provided by CO

1. Open the **Reports** page from the top navigation bar.
2. Search for the report.
3. Click **Edit**. The report opens.
4. Click **Copy** to make a copy of the report.

A copy of the report is now in your browser.

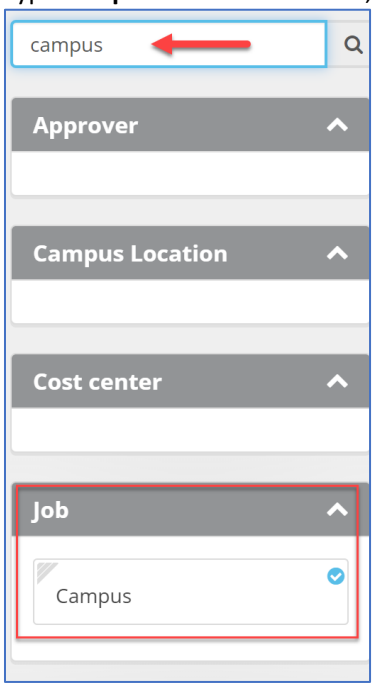
5. Hide the Sorting field area by clicking the **Sorting** button.

6. Verify that the **Campus** field is not in the **Grouping** section. If it is, then remove it by clicking on the X.

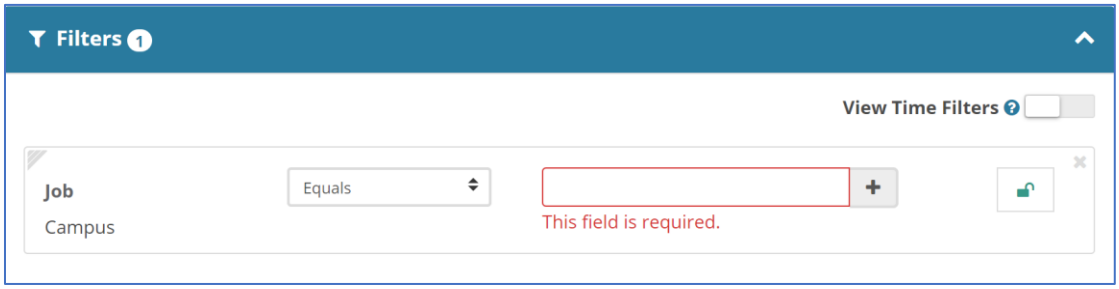


You cannot use the same field in both **Grouping** and **Filter** sections.

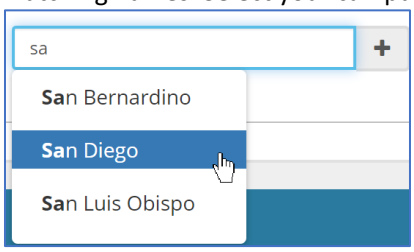
7. Type **campus** in the **Search** field, then locate the **Job** > **Campus** field.



8. Drag the **Campus** field from the fields panel to the **Filter** section.



9. Type your campus location name into the field. As you begin to type, the field displays a list of matching names. Select your campus location name.



10. Click the **Pencil** icon to rename the report, using your campus 2-letter prefix. For example, if for CSU San Diego, name the report *SD – Job (Pending) Approvals***.**

11. Click **Submit** to save the report, or click **Save and View** to view the report after saving.

What happens next

- Your report is saved to the reports library.
- You can view or export the report.
- You can schedule the report.
- You can make the report a favorite.

Related documents

Analytics and reporting

Report builder

Make a report a favorite

You can add reports to your list of favorite reports to make them easier to find.

When to make a report a favorite

- After you create a report.
- You expect to use the report often.

Prerequisites and assumptions

- You are the Campus Reports Administrator.
- You have recently created or viewed the report.
- You are on the Reports page of CHRS Recruiting.

How to make a report a favorite

1. From **My Recent Reports**, hover your cursor over the report that you want to make a favorite. New controls are displayed.
2. Click the heart icon to make the report a favorite.

What happens next

The report is added to your Favorite Reports, where you can access it without searching.

Related documents

Analytics and reporting

Report builder

Create a report

You can create reports with the Report builder tool by copying and editing an existing report, or by creating a new report. This guide focuses on a few basic concepts and how to work with Report builder. Crafting valid and useful reports and analytics is beyond the scope of this guide.

When to create reports

- You need to create a report or an analytical view for a stakeholder.
- The report that you need is not available.

Prerequisites and assumptions

- You are the Campus Reports Administrator.
- You know how to find and view reports.
- You know how to rename and save reports.

About data views

When you create a report, you must specify a data view. The data view is what you are reporting on.

- Data views provide limited access to a set of fields. Not every field is available with every data view.
- The available data views are determined by PageUp. You cannot create new data views. If you need a new data view, contact your campus administrator.
- You can choose only one data view per report. You cannot combine data views.

Structure of a report

The report building tool includes several sections. After you choose a data view, you structure the report by adding fields to these sections.

Section	Information
Sorting	Fields here determine the order in which the data is displayed.
Filters	Fields in this section limit the data in the report that satisfy the constraints of the filter.
Grouping	Grouping organizes the data into groups for analytics.
Columns	The values of the fields that you add to the columns are displayed in the report.

You can hide any of these sections by clicking on the section buttons at the top of the page.

About fields

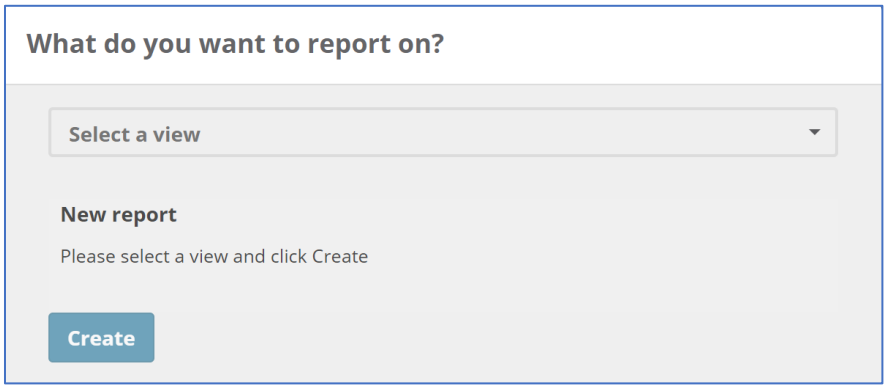
- You can search for fields by using the **Search** field in the field selection panel. However, you must know the proper field name, which is not necessarily the familiar title that you are accustomed to seeing.
- Double-clicking a field adds it to the column section of the report. If you want to add it to any other section, you must drag it.

- After you add a field to the report, you might have to specify field values, operators, or ranges. For example, dragging a date field into the Groupings section requires that you specify an aggregation type.

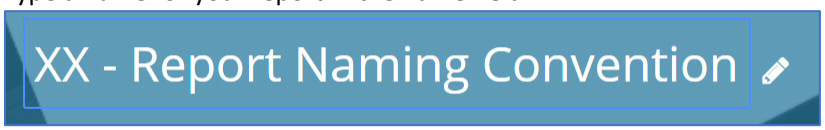
How to create a report

Use the following procedure to create a new report.

1. Click **Reports** from the top navigation bar.
2. Click **New report**. You are prompted to select a view.
3. Select a data view from the list.



4. Click **Create**.
5. Type a name for your report in the name field.



6. Build your report by dragging fields into the **Sorting**, **Filters**, **Grouping**, and **Columns** sections.
7. Click **Templates** to select an Excel template.
8. Click **Permissions** to specify users or groups to grant access to the report.

Report building guidelines

- If you cannot find a particular field, talk to your campus administrator.
- Adhere to the CSU campus naming convention when naming your reports.
  Example: FL – Job (Pending) Approvals
- When selecting a data view, you can start typing the name of a data view to filter the list.
- Use a **Campus** filter to limit your reports for your campus.
- Be selective when you give permissions to view the report.

What happens next

- If the report does not have a report template, you can create one.
- You can provide the report to your stakeholders.
- You can schedule the report to run at regular intervals.

Related documents

- Reporting
- Analytics video tutorials
- Report Builder – Report Templates

Create a report template

You can use report templates to customize how you want to view the data in an Excel spreadsheet. Rather than downloading raw data and manipulating the data each time in Excel before you send it to your stakeholders, you can create and use a report template to do this for you.

When to create a report template

- After you create a report.
- Before you send the report to your stakeholders.

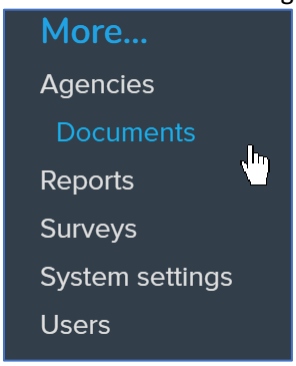
Prerequisites and assumptions

- You are a Campus Reports Administrator.
- You know how to generate reports.
- You know how to use Microsoft Excel.
- You know how to upload documents to the CHRS Recruiting system library.

How to create a report template

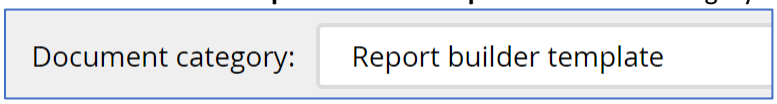
Use the following high-level procedure to create a report template.

1. Download your report.
2. To create the template:
   a. Open your report in Microsoft Excel.
   b. Rename the original sheet to **Data**. This sheet is where all the raw data from the CHRS Recruiting system is added.
   c. Create a new sheet in Excel to be the display.
   d. On the new sheet, use cell references to refer to the raw data on the first sheet. You can add as many display sheets as you want.
   e. Clear the raw data from your spreadsheet. This file is now your report template.
   f. Save the file, using your campus naming convention.
3. To add the template to the CHRS Recruiting documents library:
   a. From the CHRS Recruiting side menu, click **Documents**.



   b. Upload the Excel Spreadsheet to the PageUp document library.

- Add your template to an appropriate folder within the library. For example: SB – Report Templates.
- Be sure to select the **Report Builder Template** document category.



4. To attach the report template to your report:
   a. While editing the report, click the **Templates** button.
   b. Select your template.
   c. **Save** the report.

What happens next

- The Report template is saved with your report.
- When you export the report to Excel format, the export file uses the template.

Related documents

Report Builder - Reporting Templates Made Easy (video)

Schedule reports

CHRS Recruiting system can run reports and send them automatically to your stakeholders at regular intervals. To do this, you must schedule reports.

Important: Do not schedule reports if they contain Level 1 or Level 2 data.

When to schedule reports

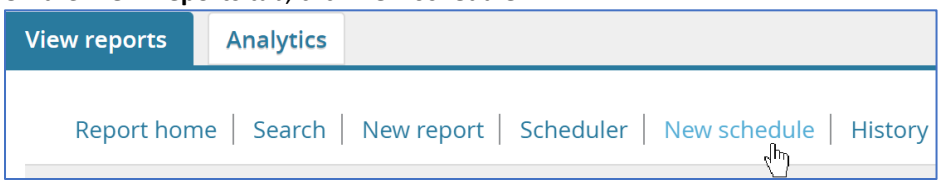
- After your report is created.
- Stakeholders need regular updates on the same report.

Prerequisites and assumptions

- You are a Campus Reports Administrator.
- Your report does not contain Level 1 or Level 2 data.

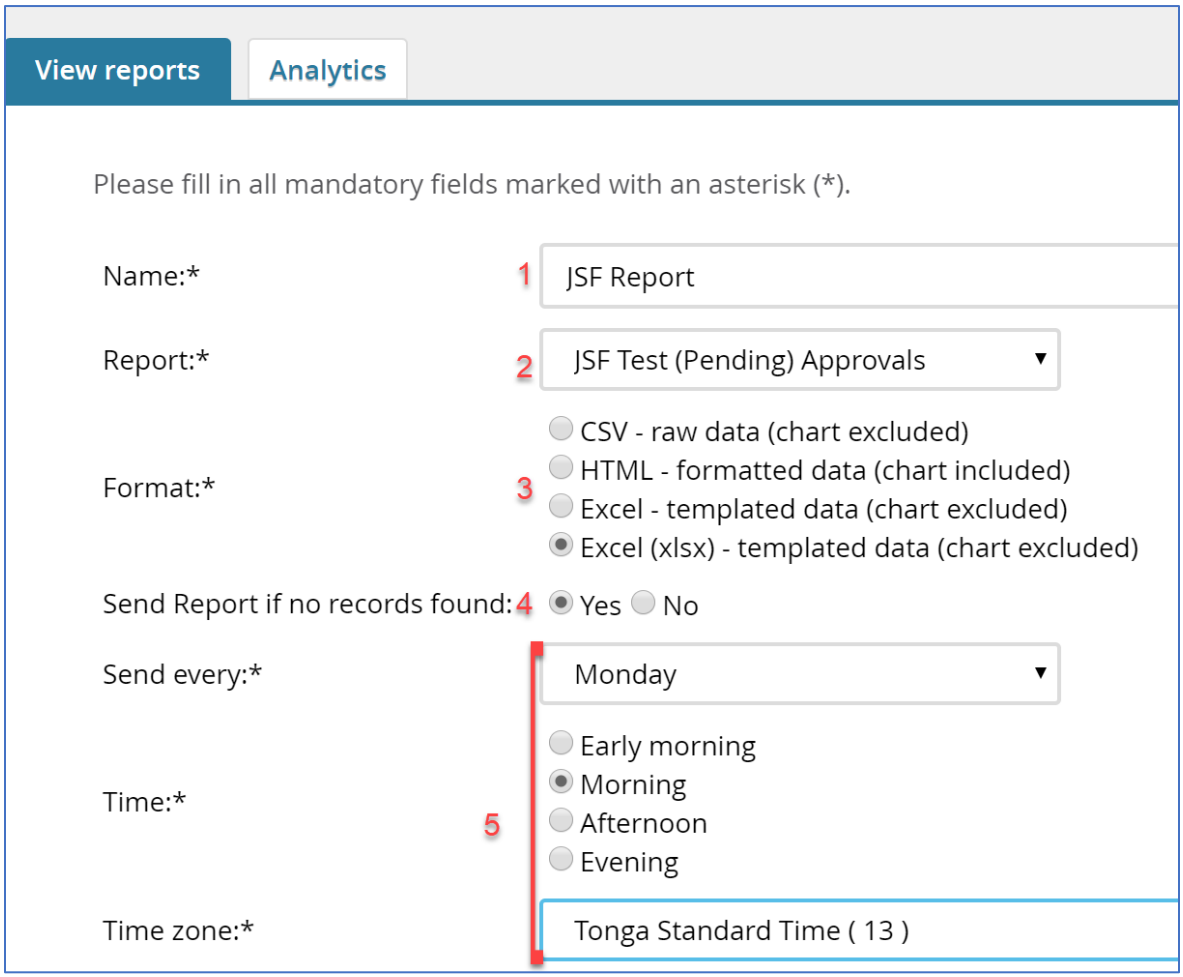
How to schedule reports

1. Click **Reports** from the top navigation bar.
2. On the **View Reports** tab, click **New schedule**.



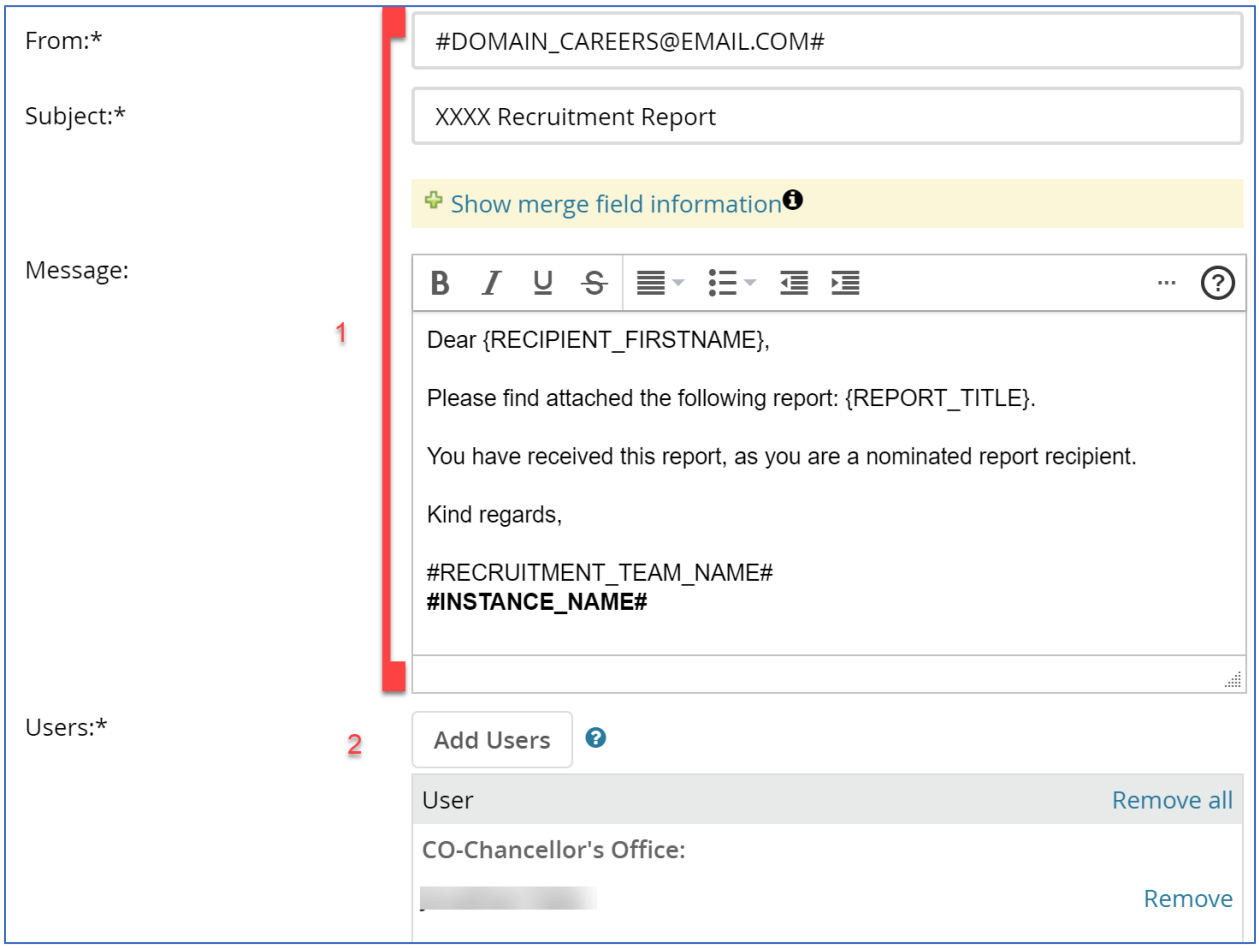
3. Use the following screen captures and tables to complete the form.

Report schedule 1



#	Field	Information
1	**Name:***	Name the schedule.
2	**Report:***	Select the report to send.
3	**Format:***	Select the format for the report.
4	**Send Report if no records found**	Select Yes if you want to occasionally send empty reports. Otherwise, select No.
5	**Send every:*** **Time:*** **Time zone:***	Specify a time interval (days, weeks, months) and when to send the report.

Report schedule 2



#	Field	Information
1	**From:*** **Subject:*** **Message:***	Edit the information for the outgoing emails to which the report is attached.
2	**Users:***	Click **Add Users** to add stakeholders to the list of recipients.

4. Click **Submit**.

What happens next

The report executes and then sends an email to the recipients on the basis of the schedule that you defined.

Related documents

Report Builder – Report schedules

Create analytics views

You can use CHRS Recruiting system analytics to visualize and drill down into data provided by reports. You access analytics on the **Analytics** tab of the Reports page.

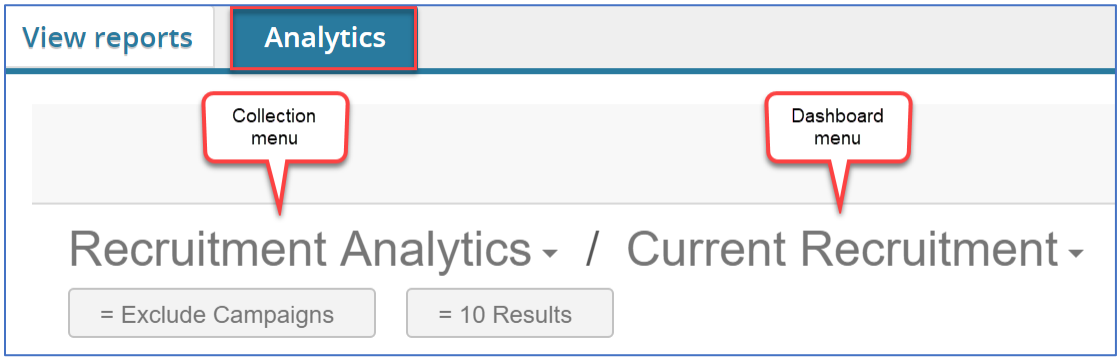
Stakeholders cannot have access to the raw, system-wide data. You must create a filtered analytic view, then provide it as a PDF file to your stakeholders.

Finding an analytics dashboard

The **Analytics** tab displays an analytics dashboard. When you open the page, you see the default dashboard.

Dashboards are arranged in collections, which are based on key performance indicators (KPIs).

To find a dashboard, first select the collection from the Collection menu, then select the Dashboard from the Dashboard menu.



When to create analytics views

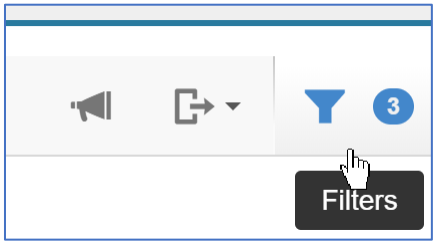
A stakeholder requests a specific view of report data.

Prerequisites and assumptions

You are a Campus Reports Administrator.

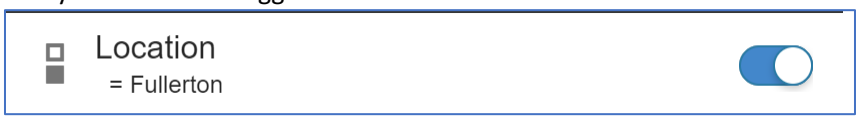
How to generate analytics views

1. Click **Reports** from the top navigation bar.
2. Click the **Analytics** tab.
3. Select the **Collection** from the Collection menu.
4. Select the **Dashboard** from the Dashboard menu.
5. Click **Filters** to apply a filter to the analytics. For example, always apply your campus filter.



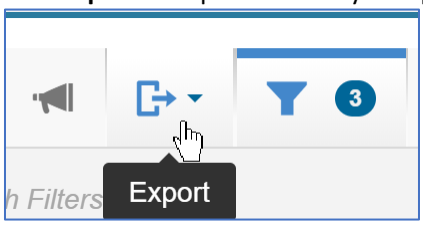
6. Select your campus advertising locations (there may be multiple).

7. Verify that the filter toggle is On.



The Analytics are automatically updated with the new filtered data.

8. Click **Export** to export the Analytic report to a PDF file.



9. Click **Download** to download the file.

Guidelines

- Analytics are a convenient way to visualize and organize report data. However, for some specific types of data, you might find Microsoft Excel a better choice for creating analytics.
- Always filter analytics for your campus.
- Do not send analytic PDF files through email if they contain Level 1 or Level 2 data.

What happens next

You can provide the filtered analytics view to your stakeholders.

Related documents

Standard Analytics