

Quick Start Guide

Configurable Reports

Configurable reports in symplr Recruiting allows you to fully customize both the data and filters used. Several Master reports available from the main *Reports* page provide the additional option to select individual fields to include on the report. Once the report filters have been set and desired fields selected, these reports can be saved so they are easily accessed and viewed whenever needed.

Creating a Report

Configurable reports can be created in just a few simple steps, as detailed below. Just select the desired Master report to use as your starting template (**Master Application**, **Master Requisition**, **Master Job Posting**). Once the filters have loaded for the selected report, you're ready to begin.

- 1 Set filters.** Just like you would any other report in symplr Recruiting, you need to set some filters to help narrow down the returned results so the report only contains the information you need.
- 2 Select fields.** Along with the wide range of filters, there's also an additional field for selecting exactly which fields to include in the report.

The **Field Selection** drop-down lists all fields, both standard and custom, that you can add to the report. Simply check the box next to the fields you want to see in the report. Any number of standard fields can be selected for a report, though only five (5) custom fields can be added to each custom report.

Want to include all standard fields quickly? Selecting the **All Standard Fields** option includes all the standard fields in the report without having to manually select each individual field.

- 3 Run the report.** After you've set the necessary filters and selected desired fields, click the **View Report** button. Your report results are displayed under the filter section with all of the selected fields.
- 4 Save the report.** The all-important final step to the process! After running the report, click the **Save Report** button. A pop-up window opens where you provide a **Name** and **Description**.

Save these entries, and the new report is listed in the **My Reports** section of the *Reports* page. Selecting the saved report in future visits automatically loads the field and filter selections.