

## Custom Fields in Reports

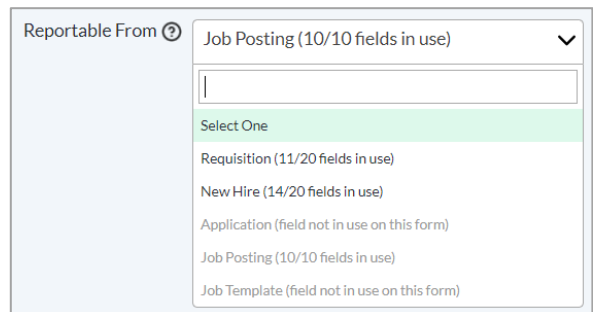
Reporting on your key data in symplr Recruiting is vital to ensuring users are making informed decisions. The ability to add custom fields to reports provides a truly customized reporting experience and delivers targeted data breakdowns to necessary users.

Recent improvements to this process make it easier than ever to determine which custom fields to add to reports. Since these custom fields can be used on multiple forms - and therefore collect different data in each location - organizations are able to select which form to pull data from when custom fields are added to reports.

### Configuring Custom Fields for Reporting

The main task for configuring custom fields for reporting is determining which form the field should pull data from when added to reports. This allows symplr Recruiting to ensure the field displays the information you want when viewing reports.

The **Field Detail** page (**Admin > Fields > Field Detail**) includes a **Reportable From** field where you select which form's data to include in reports. The drop-down menu lists all available forms where the field could be added. If the field has not been added to a particular form, that form won't be selectable in the drop-down. Additionally, if a form has the maximum number of custom fields being used in reports, it is also grayed out and cannot be selected.



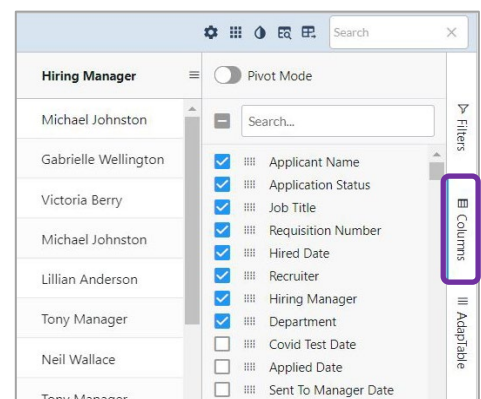
**Note:** *If a form has reached the maximum number of reportable custom fields, you can adjust which fields are included by removing a current field and adding new fields as needed.*

### Adding Custom Fields to Reports

Custom fields are added to reports just as before: select the **Columns** option after running a report and check the box for the fields you want to include. Custom fields are listed at the end of the list of available fields.

You can also use this menu to drag-and-drop checked fields to adjust the order in which they appear in the report.

After making desired selections from the Columns menu, you are asked to refresh the report and the selected fields are included as additional columns.



## Reviewing Custom Fields

The table on the **Fields** page provides columns that help identify custom fields, which forms they appear on, and which form's data is being used when adding the field to reports.

Field Name ^	Display Name	Status	Field Type	Field Location (Active Custom Fields Only)	Reportable From (Active Custom Fields Only)
Contact Name	Contact Name	Active	Custom - In Use	Job Posting, New Hire	Job Posting
Custom Job Code	Custom Job Code	Active	Custom - In Use	Job Posting (Not In Use), New Hire (In Use), R...	Job Posting
Custom JobDescription	Custom Job Description	Active	Custom - In Use	Job Posting (In Use), New Hire (In Use), Requis...	Job Posting
Custom Knowledge, Skills, Abilities	Custom Knowledge, Skills, Abilities	Active	Custom - In Use	Job Posting (Not In Use), Job Template (Not In...	Job Posting
Custom PositionNumber	Custom PositionNumber	Active	Custom - In Use	New Hire	

- **Field Type.** Values here show if custom fields are currently **In Use** on a form or **Not In Use**.
- **Field Location.** Indicates on which form(s) the field is (or was) being used.
- **Reportable From.** Indicates which form the field pulls data from when included in reports.

The **Fields** page also includes the ability to search against these columns in the **Advanced Search** pane on the left of the page, making it easy to identify custom fields and where they are used. Selecting the **Custom - In Use** option for the **Field Type** filter allows you to quickly see custom fields that can be added to reports and from which form they pull data.

**Note:** Custom fields that are listed as **Not In Use** but still display values for **Field Location** mean that the field was added to the form(s) but has since been removed. In these cases, the field can only be added to reports if a **Reportable From** selection was made before the field was removed from the form.

## The Fine Print

Just a few extra details to keep in mind when using this feature.

- The ability to update custom fields and their **Reportable From** location is controlled by system permissions. Users need the **Custom Fields** permissions found under **Administration > Templates/Fields** on the **User Role Detail** page.
- Custom fields must be in an **Active** status and reside on a form in order for them to be added to reports.
- The reporting tool must process available data for fields when a **Reportable From** selection is made, so it may take some time before these fields appear as options in the **Columns** menu when running reports.