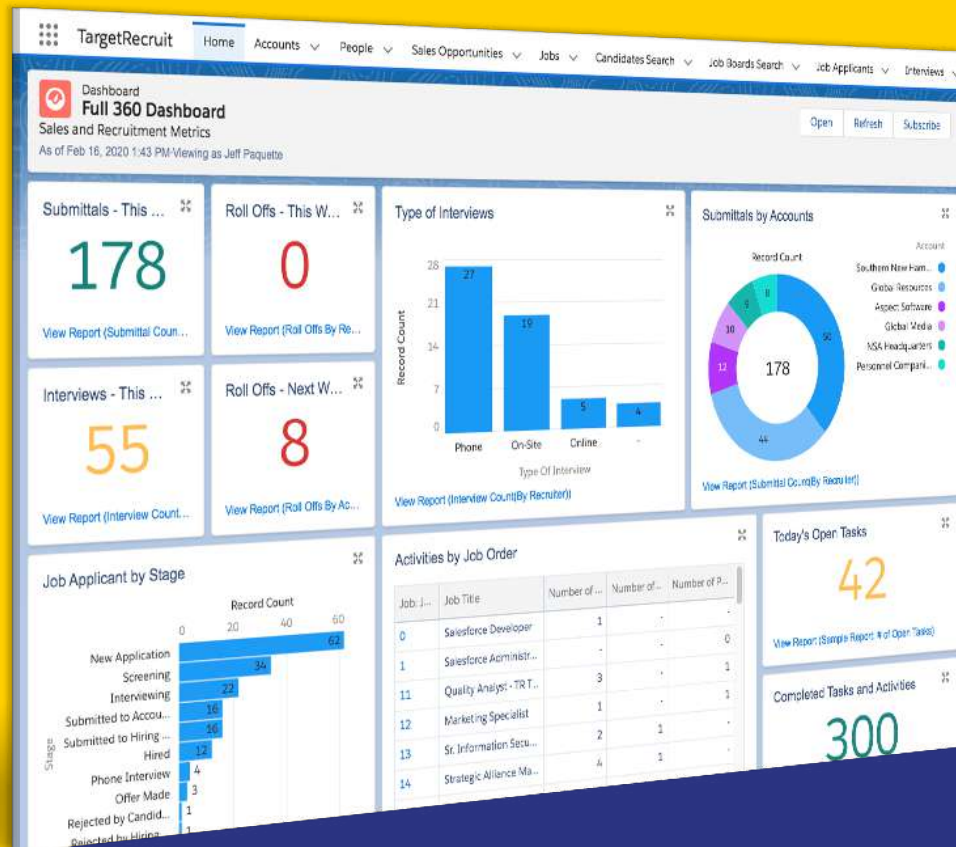




Streamline your Data Visualisation with Reports and Dashboards



The wealth of information that TargetRecruit puts at your fingertips – ranging from real-time snapshots of your business to yearly summaries – is one of the reasons our customers are so successful. By always knowing where you stand, you can spot trends early and make the best decisions for your company.

Your business has questions. Your TargetRecruit data has the answers.

Report formats

There are four different report formats available: Tabular, Summary, Matrix and Joined.

Tabular Report

The simplest way to look at data, tabular reports are an ordered set of fields in columns, with each row representing a record.

Summary Report

Summary reports are similar to tabular reports, but they also allow you to group rows of data, view subtotals, and create charts.

Matrix Report

Matrix reports allow you to group data by both rows and columns. They are good for comparing related totals or comparing values in several fields.

Joined Report

Joined reports let you create multiple report blocks, with each block acting as its own "sub-report" with its own report type, fields, columns, sorting, and filtering.

You also have the option to choose different chart types to display your results.



Report benefits

Access to real-time data

Why make decisions on outdated and incomplete data that was manually run days prior?

Pull from multiple objects into a single report

TargetRecruit's reporting will instantly and automatically pull from large quantities of data and produce real-time insight. The information stays secured within your system of record and depending on user profile permissions, will be easily accessible to all users. Many solutions are complex, confusing, and limited on the data that can be pooled from multiple facets of the product into a single report. This also required many manual efforts to build, export and combine multiple reports into a single Excel sheet. Another negative of this approach is it removes all your data from the source of truth and is not updated in real-time.

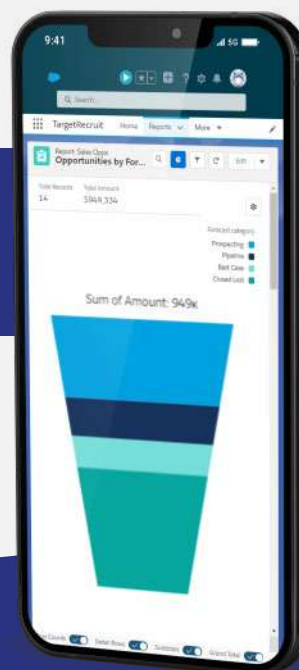
Instantly report on a custom object or custom field added to a record

TargetRecruit provides 27 types of custom fields that can be added to a record within minutes. Once these are created, they are instantly available to reporting, filters, and beyond.

Users can easily access and re-configure the report data through drag and drop capabilities

Ease of use for any user eliminates dependency on vendors or reporting specialists with limited bandwidth. Historically, producing reports from raw data can be tedious and inefficient. The time invested with creating these reports result in increased dependency and costs from a vendor and drains the time and talents of trained employees who would have been better focused elsewhere. Users can access real time data and slice and dice into a format they understand.

Produce reports that
can be easily viewed on a
mobile device



Filter reports by any data point in the platform as well as custom or rolling date ranges

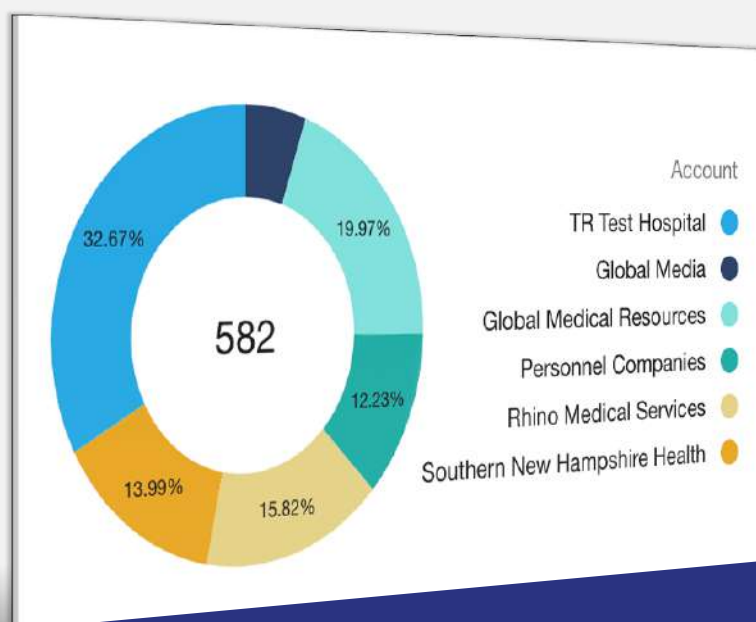
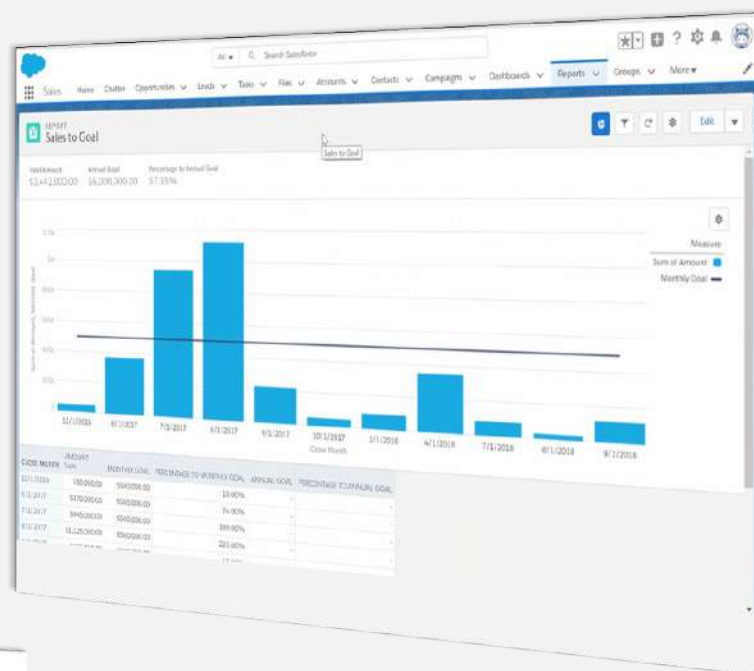
TargetRecruit allows filtering by custom date ranges, rolling days/weeks/months, calendar dates, configurable fiscal calendars, and more. No restrictions.

Exception Reports (Cross Filters)

When filtering reports, sometimes you want records with or without other related data. An example would be to find candidates without any activities in the past 30 days - or - jobs that are older than one week and have no applicants. Exception reports allow you to find where data does NOT exist. Use cross filters to further filter by any criteria.

Summary Formulas

These can handle complex calculations for all summary levels. Example: If you want to understand what clients have contributed the greatest amount of revenue this year, you can simply add columns/fields with the values for total revenue, group them by Account, and then summarise to display the percentage each account has contributed.



Row Level Formulas

Users have the ability to total or average values on rows. For example, if you want a view into your candidate pipeline and the average hourly pay rate by location and title you simply run a report on candidates, group rows by title or skill, and add an additional grouping by state. You can drag and drop the hourly rate field as a column, then right click and select total or average. The end result is a report that shows the number of candidates per city/state by that title and what the average hourly pay rate is for that city/state.

Family Nurse Practitioner (7)	MA (4)	Available	Melinda	Vazquez	Burlington	\$45.00	\$35.00
		Available	Diana	Masterson	Concord	\$55.00	\$76.00
		Available	Joan	Lawrence	Cambridge	\$65.00	\$61.00
		Available	Denise	Schacter	Boston	\$68.00	\$62.00
	Subtotal					Avg: \$58.25	Avg: \$58.50
	NH (3)	Available	Cameron	Jacenos	Boscawen	\$80.00	\$70.00
		Available	Melanie	Walker	Hooksett	\$68.00	\$65.00
		Available	Emily	Greene	Nashua	\$70.00	\$65.00
	Subtotal					Avg: \$72.67	Avg: \$66.67
	Subtotal					Avg: \$64.43	Avg: \$62.00

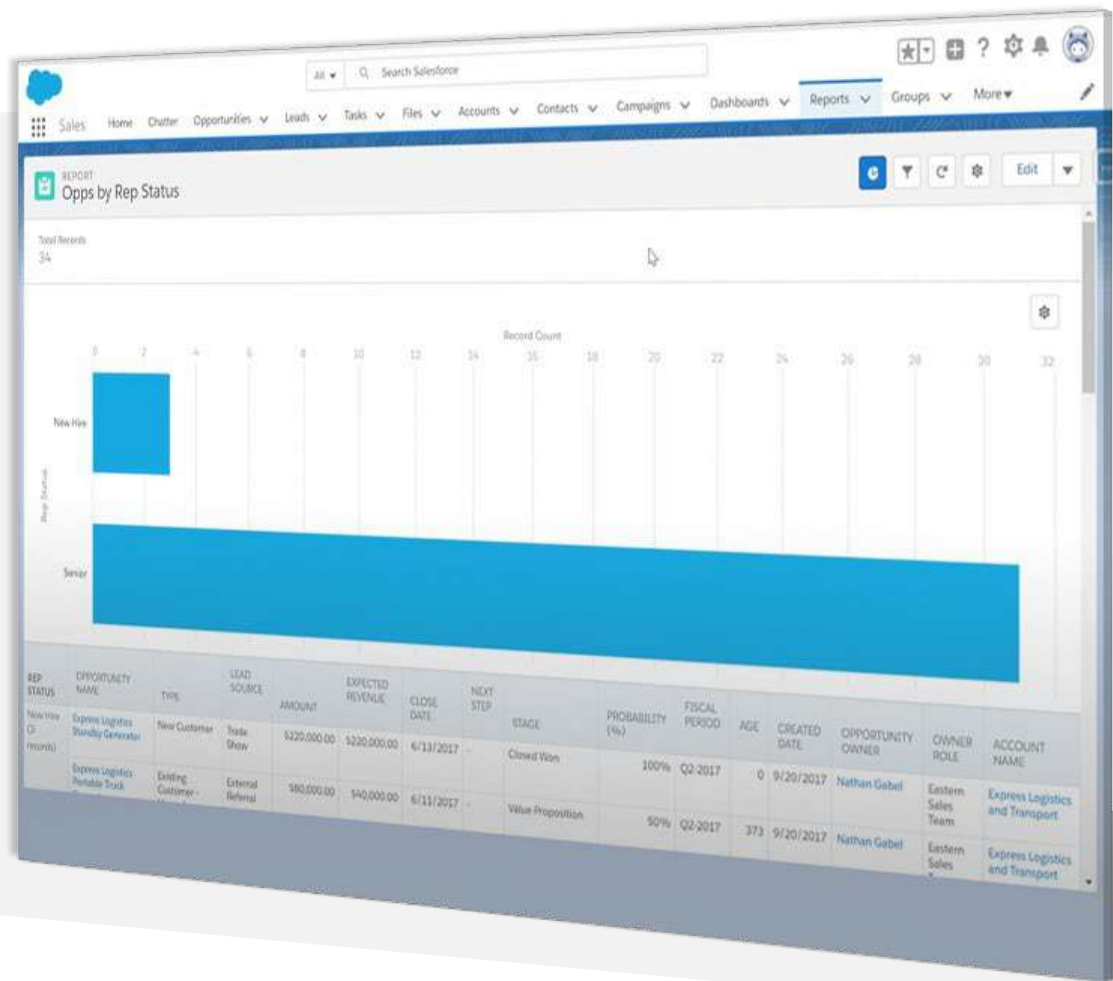
JOINED REPORT New Accounts Report														
Accounts block 1			Cases block 1				Opportunities block 1							
Account Name	Type	Rating	Subject	Date/Time Opened	Age	Open	Closed	Opportunity Name	Stage	Amount	Probability (%)	Close Date	Lead Source	Type
Edge Communications	Custo...	Hot	Starting gener...	13/09/2016 3:58 PM	-9:37	☐	☒	Demo Opportunity	Lead	\$25,000.00	0%	30/11/2017	-	-
			Shutting down...	13/09/2016 3:58 PM	-9:37	☐	☒	Edge Emergency Gen...	Id. Dec.	\$35,000.00	60%	24/08/2014	-	Estim...
			Cannot start g...	13/09/2016 3:58 PM	-9:37	☐	☒							
Egypto Bulk Company	-	-												

Joined Reports

Joined reports combine two reports with different report types within a single view, appearing as one single report. For example, you can show account details in block 1, and related jobs or opportunities in block 2. Joined reports can add up to 3 into a single view.

Buckets

Make the forecast for a team roll up to a specific region or categorise other data in a report.



Security and Permissions

You can designate reports as Public, Private or Shared. You can control who can view, edit, create and manage reports and dashboards. The ultimate in flexibility.

Advanced reporting features

Reporting Snapshots:

Reporting Snapshots allow you to take a picture of a set of TargetRecruit records and freeze the data on them for future reference.

Historical Trend Reporting:

Trend reports are designed to glance back at historical field values on a given date (the “As of date”).

Field-to-field Filters:

These special filters make it possible to compare value in different fields on a report, when defining report filter criteria.

InLine Editing:

Inline editing allows you to change the value of a field from a report.

Stacked Summaries:

Stacked Summaries summarise a substantial amount of data for quicker review and comparison.

Report management features

While you’re viewing your report, there are a few features available that, depending on your permissions, offer you various options.

Save As – Save a new version of the report

Save – Save changes to the current report

Subscribe – Subscribe to a report to receive an email with a frequency you specific

Export – Export the report to Excel or CSV

Delete – Delete the report

Add to Dashboard – Add the report as a component in a dashboard

Dashboards

Create dashboards from any report and have custom dashboards per user, per team, per branch, and more. Dashboard components come in a variety of chart types, and you can customise how data is grouped, summarised, and displayed for each component.

Display As



Access to reports and dashboards is controlled through folders

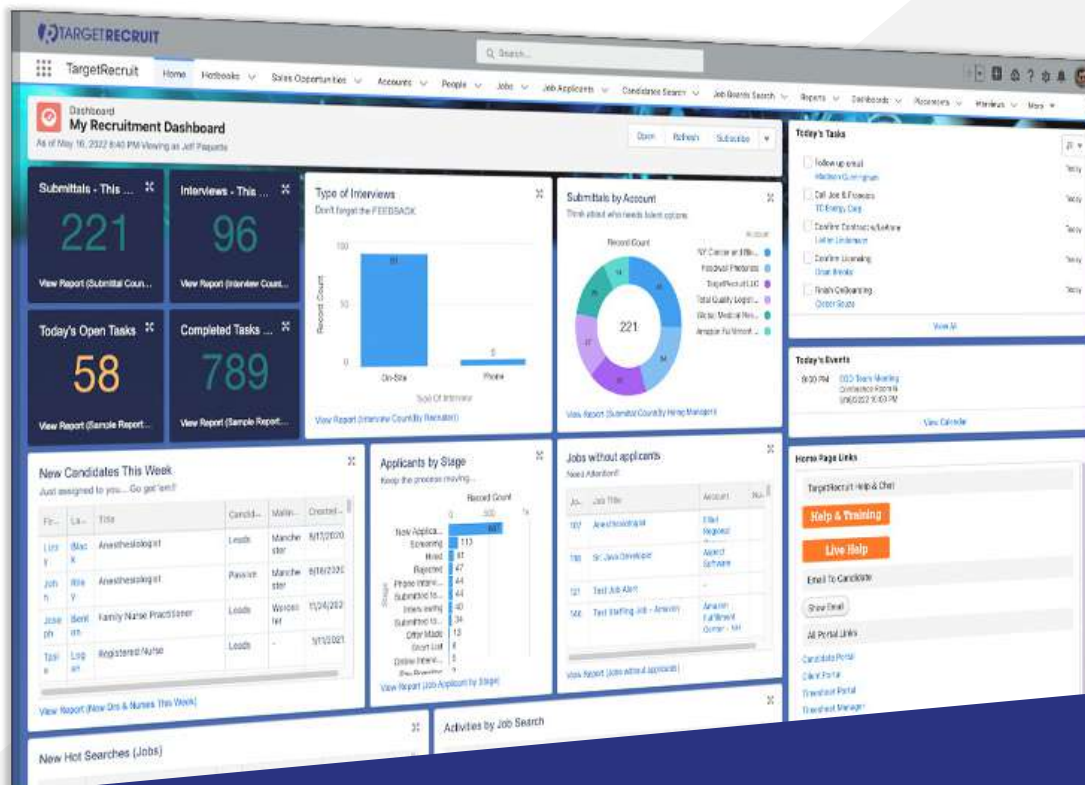
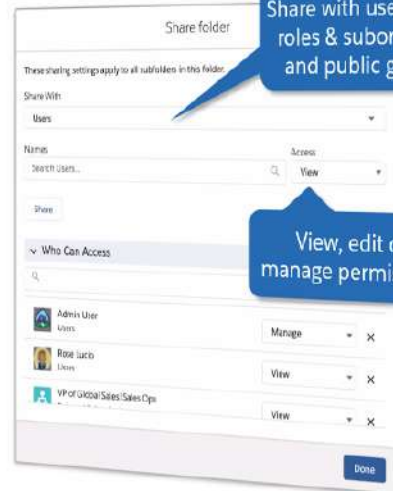
- Build subfolders to add more categories. Access is still granted at the parent folder level
- Different groups of users can be given different access to the same folder.

Your org's Sharing Model will impact who can see reports.

Share folder

Share with users, roles, roles & subordinates and public groups.

View, edit or manage permission.



For Recruiters:

[illegible]

The screenshot displays the TargetRecruit Back Office Dashboard as of May 10, 2022, at 4:03 PM. The dashboard includes several key sections:

- Project Invoicing by Batch:** A table listing invoices with columns for Batch #, Receivable Doc Number, Account, Account Name, Date, Invoice Balance, and Amount.
- Customer Balances:** A table showing journal entries with columns for Entry #, Journal Entry, Journal Entry Num., Account, Dr. Account Type, Cr., and Amount.
- Receivables with Account Report:** A horizontal bar chart comparing receivables across different accounts like All Healthcare, Attraction Fulfillment Center - NH, Aspect Software, etc.
- Employee Payout Detail:** A vertical bar chart showing the number of hours per pay period for various employees.
- Receivables by Status:** A table summarizing receivables by status, due date, amount, and age.
- Weekly Time Sheet by Recession:** A table detailing time sheets by recession, task name, date, time spent, and status.



Get in touch to streamline your Data Visualisation with
TargetRecruit's Reports and Dashboards



sales@targetrecruit.com

0800 640 3135

www.targetrecruit.com/UK