Pipeline Reports

Standard Reports · https://learning.pcrecruiter.net/site/docs/reports/pipeline-reports/

A Pipeline represents the workflow you take a candidate through for a specific position. Pipeline Reports allow you to generate detailed insights based on the steps candidates move through within the pipeline workflow. The type of report you use will depend on the version of Pipeline your database is enabled with:

- **New Pipeline**: Use the *New Pipeline Report*.
- **Legacy Pipeline**: You can use the *Applicant Tracking Report*, *Candidate Timeline by Position Report*, or *Active Candidate Pipeline*.
- **Custom Reports**: The *Custom Pipeline Report* and *Custom Applicant Tracking Report* support both the New and Legacy Pipelines.

New Pipeline Report

The *New Pipeline Report* is specifically designed for the "new" version of the pipeline. This report offers a variety of filters, as described below, allowing you to focus on the information most relevant to your needs.

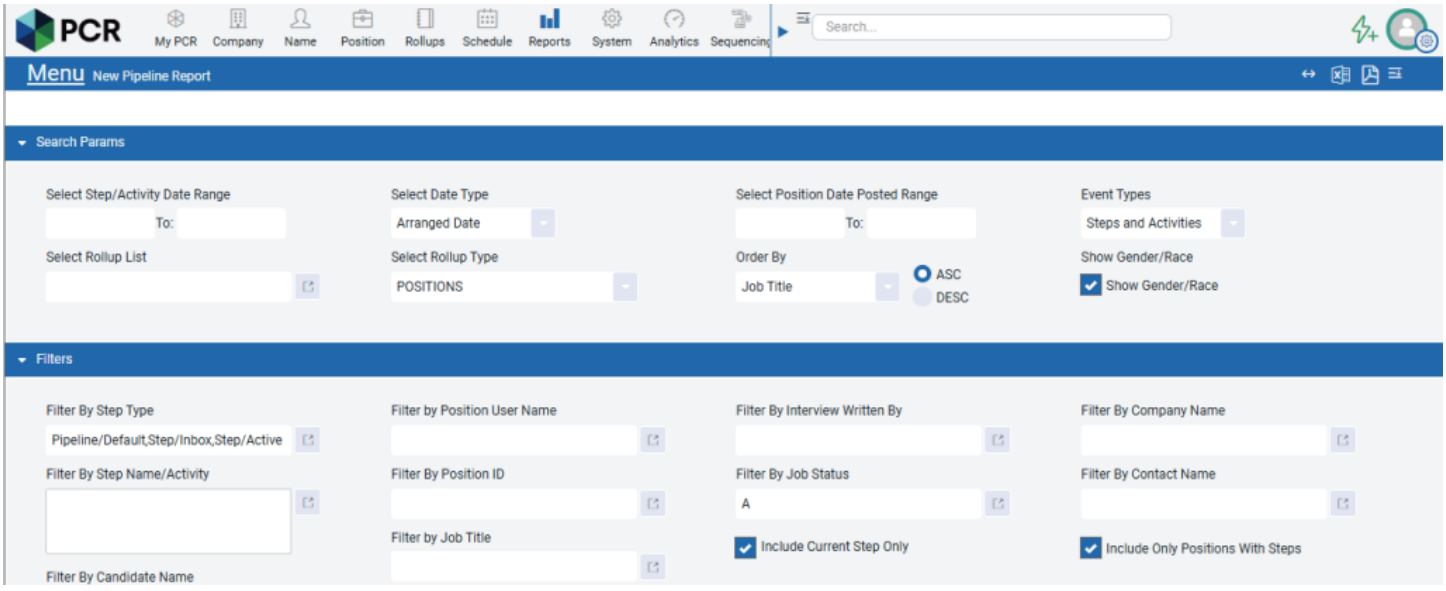
1. Click **Reports** on the main toolbar.
2. Select **Pipeline Reports**.
3. Click **New Pipeline Report**.
4. Under the **Search Params** heading, you can narrow results on the following criteria:
    - **Step/Activity Date Range:** Define a date range and specify whether this is based on the Arranged (created) date or the Appointment Date (date chosen in the Add Step screen).
    - **Position Date Posted Range**: Define a date range based on the Date Posted field from the Position record to narrow results.
    - **Showing Details for Steps and/or Activities:** Choose whether to display step and activity details.

- **Companies or Positions Rollup**: Narrow results by selecting a rollup list of companies or positions.
- **Order By and EEOC Options**: Specify the order of results, and choose whether to include EEOC Gender and Race data.

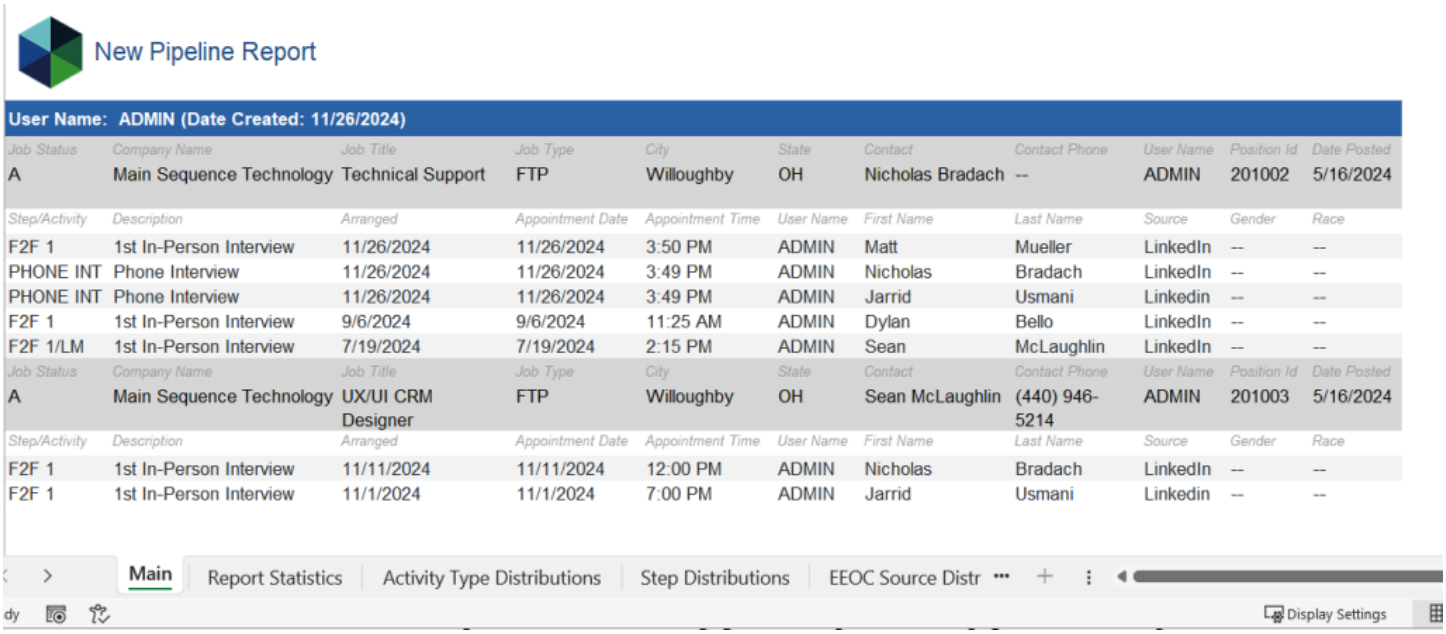
5. Under the **Filters** heading, you can further narrow your results using these options:
   - **Filter by Step Type**: Click the pop-out selector, then choose your pipeline template name. From there, select options such as *Inbox*, *Active*, *Out of Process*, *Placements*, or *Contract Temp*.
     - This is useful for narrowing results to all *Active* steps (all steps between *Inbox* and *Placement*) or *Out of Process* steps without needing to select each step individually.
   - **Filter by Step Name/Activity**: Use the pop-out to select the pipeline template name, then choose a specific step. For example, you might focus on a specific active step or particular out-of-process category.
   - **Filter by Candidate Name**: Enter the full candidate name or use the pop-out selector to search and select the candidate.
   - **Filter by Position User Name**: Narrow results by the *User Name* field in the Position record.
   - **Filter by Position ID**: Use the *Position ID* field from the Position record to narrow results.
   - **Filter by Job Title**: Narrow results by the *Job Title* field in the Position record.
   - **Filter by Interview Written By**: Focus results based on who created the pipeline step in the workflow.
   - **Filter by Job Status**: Use single-letter codes stored in the system to filter by job status:
     - **A** = Available Open
     - **I** = Internal Only
     - **F** = Filled
     - **C** = Closed
     - **H** = Hold
   - **Filter by Company Name**: Use the selector to narrow results based on the company name.
   - **Filter by Contact Name**: Enter the full name of the contact associated with the position as indicated on the Position record.

- **Include Current Step Only**:
  - This option limits results to only show where the candidate currently is in the pipeline for a position.
  - If used with *Filter by Step Type* or *Filter by Step Name*, it will display only candidates currently at the selected step.
- **Include Only Positions with Steps**:
  - Selected by default to exclude positions without candidates in the pipeline.
  - If unchecked, the report will also include positions with no candidates in the pipeline.

6. Export the Report. Once the filters are defined, choose the appropriate export option:
   - Print
   - PDF View Mode
   - Export to Excel
   - Export to Office 365
   - Export to Google Sheets



New Pipeline Report Filters



New Pipeline Report

User Name: ADMIN (Date Created: 11/26/2024)

Job Status	Company Name	Job Title	Job Type	City	State	Contact	Contact Phone	User Name	Position Id	Date Posted
A	Main Sequence Technology	Technical Support	FTP	Willoughby	OH	Nicholas Bradach	--	ADMIN	201002	5/16/2024

Step/Activity	Description	Arranged	Appointment Date	Appointment Time	User Name	First Name	Last Name	Source	Gender	Race
F2F 1	1st In-Person Interview	11/26/2024	11/26/2024	3:50 PM	ADMIN	Matt	Mueller	LinkedIn	--	--
PHONE INT	Phone Interview	11/26/2024	11/26/2024	3:49 PM	ADMIN	Nicholas	Bradach	LinkedIn	--	--
PHONE INT	Phone Interview	11/26/2024	11/26/2024	3:49 PM	ADMIN	Jarrid	Usmani	Linkedin	--	--
F2F 1	1st In-Person Interview	9/6/2024	9/6/2024	11:25 AM	ADMIN	Dylan	Bello	LinkedIn	--	--
F2F 1/LM	1st In-Person Interview	7/19/2024	7/19/2024	2:15 PM	ADMIN	Sean	McLaughlin	LinkedIn	--	--

Job Status	Company Name	Job Title	Job Type	City	State	Contact	Contact Phone	User Name	Position Id	Date Posted
A	Main Sequence Technology	UX/UI CRM Designer	FTP	Willoughby	OH	Sean McLaughlin	(440) 946-5214	ADMIN	201003	5/16/2024

Step/Activity	Description	Arranged	Appointment Date	Appointment Time	User Name	First Name	Last Name	Source	Gender	Race
F2F 1	1st In-Person Interview	11/11/2024	11/11/2024	12:00 PM	ADMIN	Nicholas	Bradach	LinkedIn	--	--
F2F 1	1st In-Person Interview	11/1/2024	11/1/2024	7:00 PM	ADMIN	Jarrid	Usmani	Linkedin	--	--

Main | Report Statistics | Activity Type Distributions | Step Distributions | EEOC Source Distr ... | Display Settings

Sample New Pipeline Report Exported to Excel

Legacy Pipeline Reports

Applicant Tracking Report

This is a very flexible report to accommodate the various reporting needs for candidate tracking. The data presented is grouped by Position and is generated based on interview records. When selecting how to generate the report, the user is provided the following options:

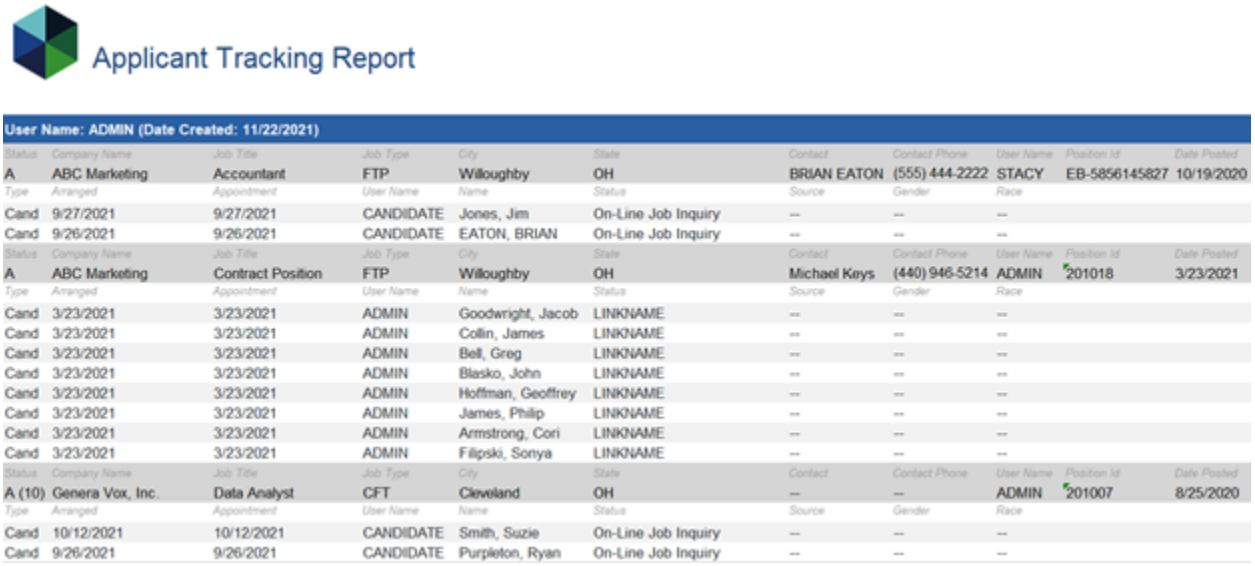
- Report on a Company, Name or Position Rollup.
- Report based on the Arranged/Placed Date or Appointment/Start Date of the interview records.
- Sort by Job Title, Position Id, Company Name, Contact Name, User Name, Placement Date, Date Posted, City, or State/Country.
- Filter by Contact Name, User Name, Company Name, Job Title, Position Id, Interview Type, or Interview Status.
- Include Only Positions with Interviews.

The report groups data by Position. For each position, the report includes Position Status, Company Name, Job Title, Job Type, City, State, Contact Name, Contact Phone, User Name, Position Id, and Date Posted. Under each position, the following Interview information is included: Interview Type, Arranged Date, Appointment/Start Date, User Name, Name of Candidate, Interview Status, Gender/Race, and

Source. The Gender/Race and Source data is retrieved from the EEO Data area from Details on the Name record. The report also includes:

- Ratios for the Total Number of Positions/Unique
- Ratios for the Total Number of Available Positions/Unique
- Ratios for the Total Number of Internal Positions/Unique
- Total Number of Interviews
- Total Number of Unique Candidates
- Interview Type Distributions
- Interview Status Distributions
- EEOC Race Distributions
- EEOC Gender Distributions
- EEOC Source Distributions

Sample Applicant Tracking Report



Applicant Tracking Report

User Name: ADMIN (Date Created: 11/22/2021)

Status	Company Name	Job Title	Job Type	City	State	Contact	Contact Phone	User Name	Position Id	Date Posted
A	ABC Marketing	Accountant	FTP	Willoughby	OH	BRIAN EATON	(555) 444-2222	STACY	EB-5856145827	10/19/2020
Type	Arranged	Appointment	User Name	Name	Status	Source	Gender	Race		
Cand	9/27/2021	9/27/2021	CANDIDATE	Jones, Jim	On-Line Job Inquiry	--	--	--		
Cand	9/26/2021	9/26/2021	CANDIDATE	EATON, BRIAN	On-Line Job Inquiry	--	--	--		
Status	Company Name	Job Title	Job Type	City	State	Contact	Contact Phone	User Name	Position Id	Date Posted
A	ABC Marketing	Contract Position	FTP	Willoughby	OH	Michael Keys	(440) 946-5214	ADMIN	201018	3/23/2021
Type	Arranged	Appointment	User Name	Name	Status	Source	Gender	Race		
Cand	3/23/2021	3/23/2021	ADMIN	Goodwright, Jacob	LINKNAME	--	--	--		
Cand	3/23/2021	3/23/2021	ADMIN	Collin, James	LINKNAME	--	--	--		
Cand	3/23/2021	3/23/2021	ADMIN	Bell, Greg	LINKNAME	--	--	--		
Cand	3/23/2021	3/23/2021	ADMIN	Blasko, John	LINKNAME	--	--	--		
Cand	3/23/2021	3/23/2021	ADMIN	Hoffman, Geoffrey	LINKNAME	--	--	--		
Cand	3/23/2021	3/23/2021	ADMIN	James, Philip	LINKNAME	--	--	--		
Cand	3/23/2021	3/23/2021	ADMIN	Armstrong, Cori	LINKNAME	--	--	--		
Cand	3/23/2021	3/23/2021	ADMIN	Filipski, Sonya	LINKNAME	--	--	--		
Status	Company Name	Job Title	Job Type	City	State	Contact	Contact Phone	User Name	Position Id	Date Posted
A (10)	Genera Vox, Inc.	Data Analyst	CFT	Cleveland	OH	--	--	ADMIN	201007	8/25/2020
Type	Arranged	Appointment	User Name	Name	Status	Source	Gender	Race		
Cand	10/12/2021	10/12/2021	CANDIDATE	Smith, Suzie	On-Line Job Inquiry	--	--	--		
Cand	9/26/2021	9/26/2021	CANDIDATE	Purpleton, Ryan	On-Line Job Inquiry	--	--	--		

Candidate Timeline by Position

This report can be filtered by a Company or Position Rollup List, Company Name, Job Title, Position ID, Job Status, Position User Name, Position Date Posted, Interview Appointment Date, or Interview Arranged Date.

The report will show the company to which the Position is associated, Position ID, and Job Title. The Name and Source are listed for each candidate, along with the Appointment Date, Interview Type and Interview Status of each interview for the candidate.

Interview Status Distributions, Interview Type Distributions, and Source Distributions are included at the bottom of the report.

Sample Candidate Timeline by Position Report



Candidate Timeline by Position Report

User Name: ADMIN (Date Created: 11/22/2021)

Company Name	Position ID	Job Title		
ABC Marketing	201018	Contract Position		
First Name	Last Name	EEOC Source	Appointment Date	Interview Type/Status
Marie	Anderson	--	3/23/2021	PRE/LINKNAME
Cori	Armstrong	--	3/23/2021	PRE/LINKNAME
Mark	Beery	--	3/23/2021	PRE/LINKNAME
Greg	Bell	--	3/23/2021	PRE/LINKNAME
Christopher	Berrios	--	3/23/2021	PRE/LINKNAME
DAVID	BIRD	--	3/23/2021	PRE/LINKNAME
John	Blasko	--	3/23/2021	PRE/LINKNAME
Daniel	Brown	--	3/23/2021	PRE/LINKNAME
Company Name	Position ID	Job Title		
Genera Vox, Inc.	201007	Data Analyst		
First Name	Last Name	EEOC Source	Appointment Date	Interview Type/Status
Ryan	Purpleton	--	9/26/2021	PRE/On-Line Job Inquiry
Suzie	Smith	--	10/12/2021	PRE/On-Line Job Inquiry
Emmeline	Vance	--	1/1/2020	TMP/Contract/Temp
Company Name	Position ID	Job Title		
Maxwell-Edison Medical	201011	Doctor		
First Name	Last Name	EEOC Source	Appointment Date	Interview Type/Status
DAVID	BIRD	--	10/2/2020	PRE/LINKNAME
DAVID	BIRD	--	10/2/2020	OTH/Reviewed

Active Candidate Pipeline

This report can be generated based on a Company or Position Rollup List, individual Companies or Positions, Position Status or Position User Name. You may also include candidates based on Interview Type history using the Required option (i.e. candidate must have an In Person interview record to be included), or exclude candidates based on their Current Interview Status (i.e. exclude candidate if

currently out of process).

The report will show the company to which the position is associated along with the company's address. For each position included in the report, the Position ID, Job Title, and Position Contact are shown. A row is presented for each candidate that has been linked to the position. Each row includes:

- Candidate Name
- Y/N Active: A candidate is not considered active if the Interview Type for the most recent interview record is Placed, Offer Declined, or Out of Process.
- Date Resume Submitted: Date of the first interview record for the candidate and this position where the Interview Type equals Resume.
- Days in Process: Calculates based on the number of days from the date the resume was submitted to the current date.
- The Interview Type, Interview Status, and Appointment Date of the most recent Interview record.

Unique candidate distributions are also provided. These numbers reflect the number of unique individuals currently at each Interview Type and the History of unique individuals for the Interview Type. These numbers reflect the counts displayed next to a pipeline folder.