

GAIN PRODUCTIVITY WITH BalanceTRAK WIDGETS 2019

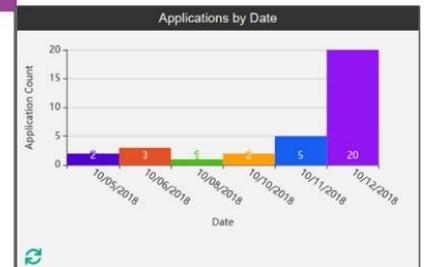
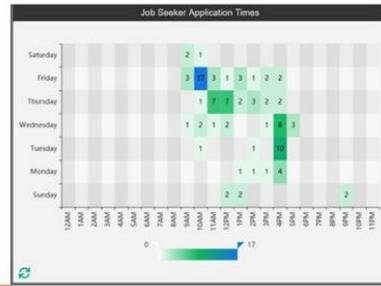


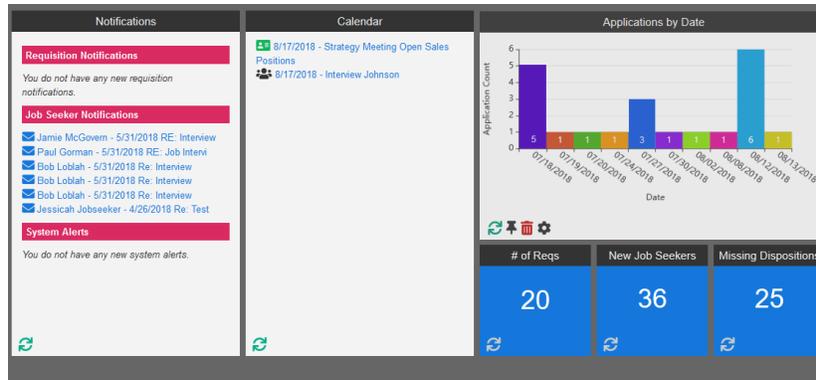


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TRAK Widgets: Gain Productivity in your Recruiting Practices



BalanceTRAK, an Applicant Tracking System, supports the full recruit-to-hire process, with on-line tools that put your job postings in front of potential candidates, allow job seekers to apply, and facilitate your efforts to track, manage, and ultimately, hire the best candidate for each job opening.

In performing these functions, this software collects critical data that can help you understand not just your immediate hiring workload, but also the status and effectiveness of your recruiting practices.

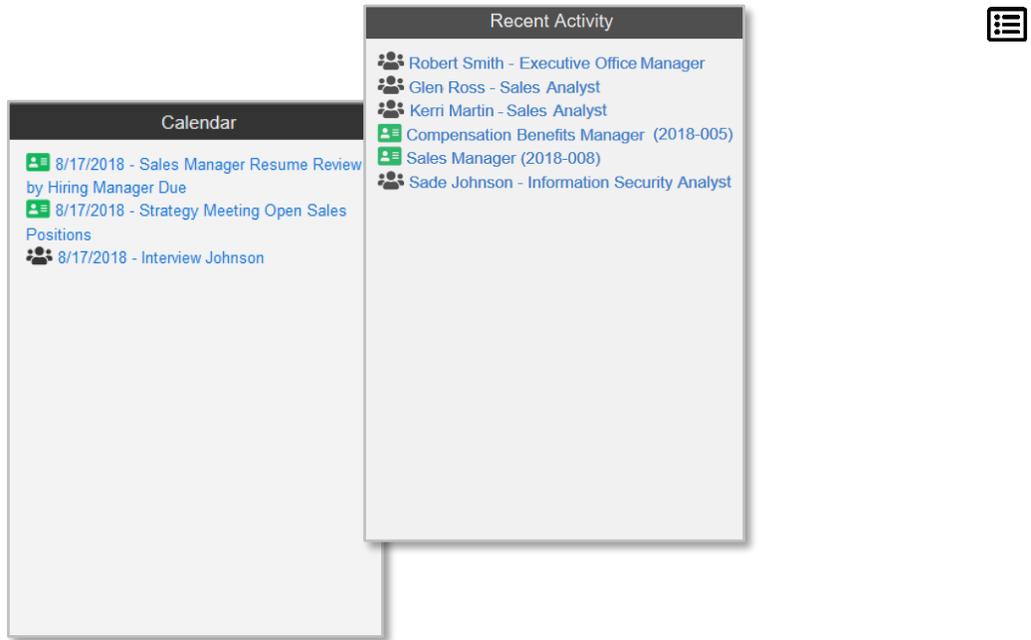
That's why **balanceTRAK's** landing page is more than a 🏠 Home page to "pass through" each day, it's a full-service data center that can be personalized to deliver the critical information you will interact with every day.

What's the Dashboard Made Of?

The **Dashboard** is built from a number of graphical "widgets," ranging from lists and alerts to graphs and counter tiles. While some are based on software actions (e.g., Saved Searches), others are derived from applicant or job posting data. Two software modules – 👤 **Job Seekers** and 📄 **Requisitions** – drive how information is presented within the widgets. In fact, with a mouse click, widgets allow you to access linked pages, view filtered job seeker or requisition lists, or take actions in the system, based on the object. Remember, you can include objects and organize the **Dashboard** in any way you like.

The following pages will describe how these widgets work, plus how they can benefit the **balanceTRAK** user. For a common starting point, this overview emphasizes each widget's default settings. However, widgets can be customized across the client account or by the individual user for included factors, date range, location/department, and the like. Relative to the widget, you can also design multiple versions of the same object to represent certain variations or subsets available in the source data. Widget data are always updated upon entry to the Dashboard.

For statistics that go beyond the widget "snapshots," **balanceTRAK** offers detailed reporting in many of the data-driven areas. For complete information on how to build and organize the **Dashboard**, customize settings, and perform underlying software activities, please see the software 🗉 **Help** Documentation, including the **BalanceTRAK Training Guide**, available on line.



USER-BASED WIDGET LISTS

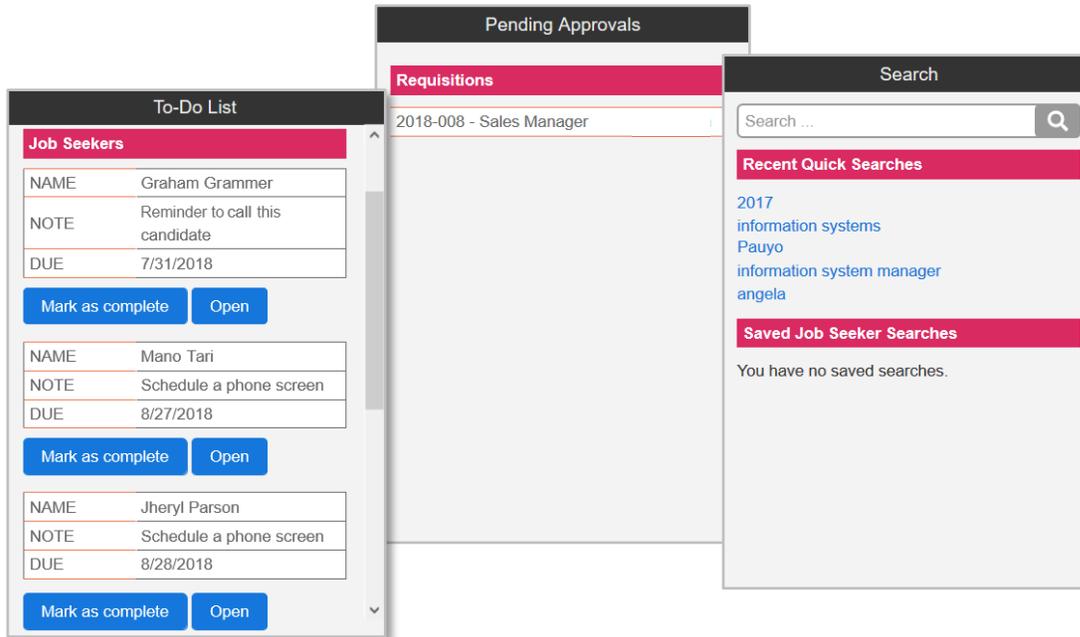
While many widgets will present data to all users having the same access to data and/or a location, the following group of five widgets will only be visible to you.

Calendar

In list format, the **Calendar** puts the dates of both job seeker interviews and requisition-related events at your fingertips, so you stay abreast of upcoming activities. Clicking on an entry transfers you to the **Calendar** tab within a requisition record or the **Interview** tab within the job seeker’s detail, respectively.

Recent Activity

The **Recent Activity** list helps you stay on “trak.” This widget records the last 10 pages you visited in requisition or job seeker records, allowing you to return to a particular requisition or job seeker and continue where you left off.



To-Do List

Of a matter of course, another important widget to scan is the **To-Do List**, a widget that culls tasks and other information from **Notes**, saved within a job seeker or a requisition record. Without having to access these records, you can even mark a **To-Do List** entry as complete. Or with one click, you can travel from the widget to the **Notes** tab in the originating record.

Pending Approvals

The **Pending Approvals** widget facilitates your organization's process for acquiring and documenting requisition approvals, if such a process is in place. Via this object, both the requestor and the approver(s) will have access to a list of pending approvals. The designated approver can follow a link from the widget to either approve or reject the particular requisition and supplement the decision with comments.

Search

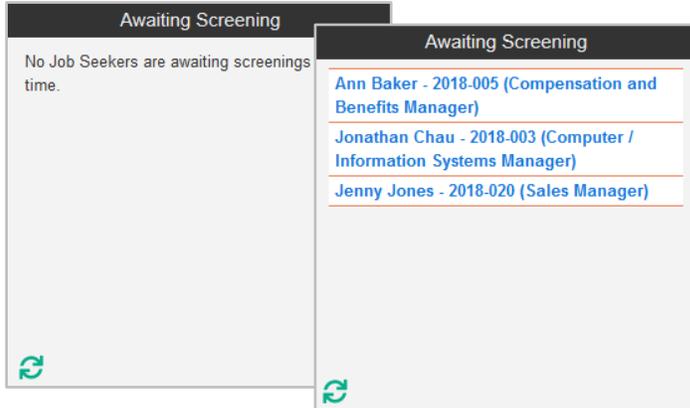
By placing the **Search** widget on your Dashboard, you gain instant access to a multifaceted search tool. Beginning with the Search bar, you can perform additional Quick Searches of requisition and job seeker data. And those who run regular job seeker searches can save time and effort by visiting the object's Saved Job Seeker Searches when a detailed inquiry needs to be run again.



JOB SEEKER WIDGET LISTS

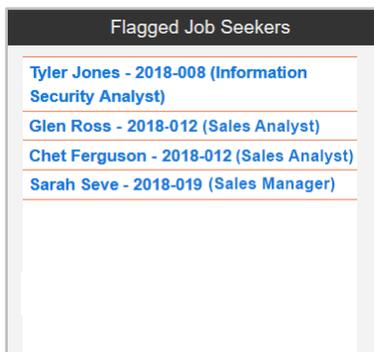


Awaiting Screening



The job seeker list for **Awaiting Screening** represents any job seekers whose information is currently out for background checks or other external screening. Although above left, the object is shown empty, each entry in this list will be linked to the corresponding **Screenings** tab for the job seeker, as shown above right.

Flagged Job Seekers



The list widget for **Flagged Job Seekers** is directly tied into the  **Flag** label, which can be applied from within the job seeker's record to highlight an applicant for later reference. A flagged job seeker is not only labeled on the job seeker list, but the applicant's name is also "sent" to this Dashboard object, so you can quickly access each one. An unlimited number of flagged Job seekers are identified by name, Requisition Number applied to, and job title.



New Job Seekers List

New Job Seekers	
Gerry Tall	2018-019 (Sales Manager)
Jonathan Chau	2018-033 (Computer Systems Manager)
Susie Kudrow	2018-008 (Information Security Analyst)
Susan Quay	2018-019 (Sales Manager)
Amy Chan	2018-033 (Computer Systems Manager)
Lisa Waters	

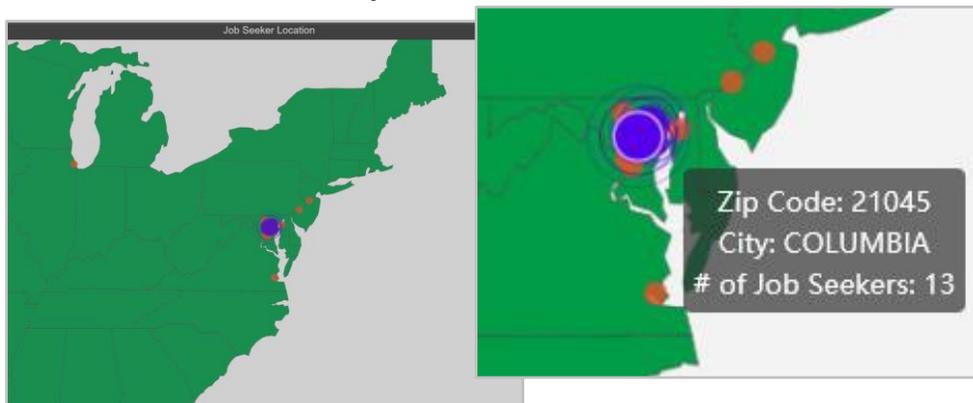
Like **Flagged Job Seekers** (above), the **New Job Seekers** widget also scans for a flag in the system, but this time **balanceTRAK** recognizes ***NEW** job seekers who just completed the Application (or Prescreener) form. The detail for each new job seeker can be launched through a link in the object.

Note: A job seeker is "new" until you view the record. However, he or she can be marked as "new" again, using an Action on the job seeker list.

JOB SEEKER GRAPHS AND COUNTER TILES



Job Seeker Location Map

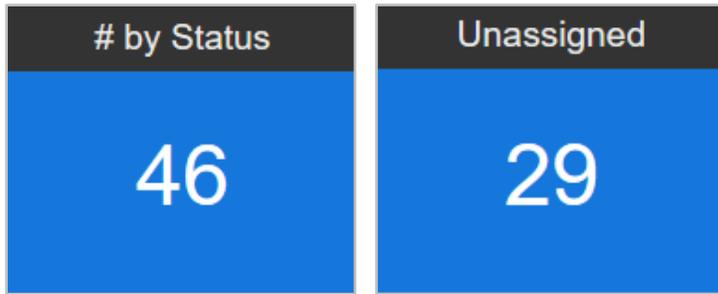


Attracting job seekers who live within commuting distance of the hiring location may be one of the most frequent recruiting "wants." As a map graphic, the **Job Seeker Location** widget helps address this need by providing concrete information on where job seekers who have applied reside. The highest responding location is indicated with a radiating purple "bubble," while more sporadic locations for job seekers are shown by orange dots. With the hover of the mouse, a caption can be displayed, identifying ZIP code and number of Job Seekers.

In tile settings, the zoom can be set to look closer at the locations. This widget is augmented by **balanceTRAK's** *Job Seeker Zip Code Analysis* report.



Job Seekers by Applicant Status Tile



Available for customization, the **Job Seekers by Applicant Status** tile counts job seekers, based on filter selections you make for (1) Stage, which is the recruiting phase, and (2) Disposition, the applicant’s final outcome.

The default **# by Status** tile (shown above left) is ideal as the “template” for creating other counters for various purposes: For one customized example (shown above right), a tile entitled “**Unassigned**” could display how many job seekers are currently not assigned to a Stage, meaning their records need to be addressed. (Or, the **Silver Medalist** tile could highlight the number of potentially qualified candidates already in the system and flagged as such, who could be invited to reapply or apply for a different position.)

Even better, each tile will take you to the filtered list when clicked on, so you can take the necessary action(s).

Job Seekers by Source Tile

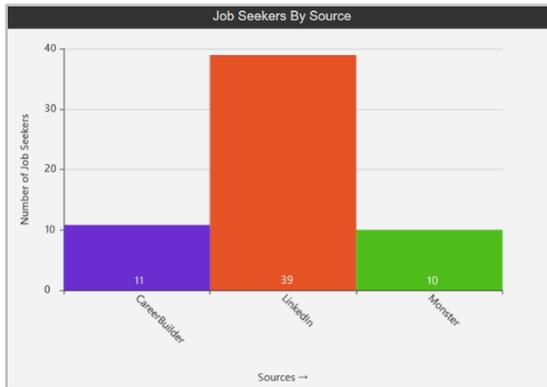


The **Job Seekers by Source** tile (or **# by Sources**, for short) is another tile you will want to label and customize, this one by recruiting source, such as Careerbuilder, Indeed, or LinkedIn, among others. (The example above shows the number of job seekers who came from Facebook.)

Then, a count for each source your organization uses can be readily compared on the Dashboard. In addition, each tile can be clicked to view **balanceTRAK’s** detailed *Referral Summary* report for all sources.

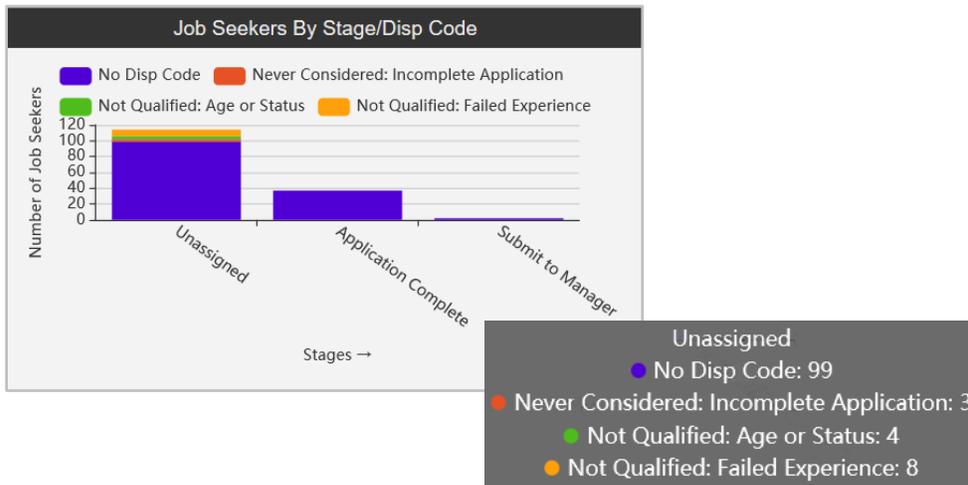


Job Seekers by Source Graph



As a companion to the **Requisitions by Source** graph (described below), this chart shows where job seekers are coming from and how many, whether the source is a popular job board, Facebook, or a college/university. The graph displays the number of job seekers per source.

Job Seekers by Stage Graph



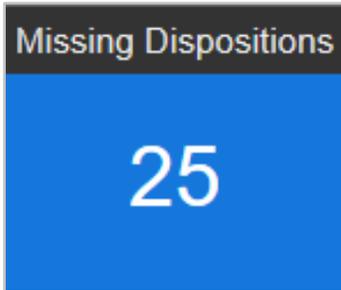
In chart format, the **Job Seekers by Stage** widget graphically displays the number of job seekers by: (1) Stage, the recruiting phase, and (2) Disposition, the subset of final screening outcomes within the Stage, as applicable. Keep in mind, each client organization can have its own set of labels for these Stages and Disposition Codes.

Note: Job seekers who remain under consideration will be included under the label: "No Disposition Code" (or a similar caption).



Each Stage/Disposition is color-coded for quick identification of where the screening workload lies. Hovering your mouse over a chart column prompts a caption to show, displaying the numerical details for each Disposition.

Job Seekers Missing Disposition Codes Tile



By scanning the final status assignments for all job seekers, the system alerts you to the number of applicants who have not been dispositioned, via the **Job Seekers Missing Disposition Codes** tile.

Remember, the count will include some job seekers who remain under consideration for an open position. On the other hand, the count may also reflect a number of job seeker records that require updating due to positions being filled with other candidates.

The link to this tile opens the job seeker list, filtered to include only applicants with the assignment: "Not Dispositioned" or similar code.

New Job Seekers Tile



The count of **New Job Seekers** is culled from the job seeker list, considering only those applicants who have (1) submitted an Application (or Prescreener) form through the job seeker portal and (2) remain unviewed, by the individual **balanceTRAK** user. Clicking on the widget displays a filtered job seeker list, comprised of these new, unviewed applicants.

Note: Although the "New" label is removed when you click on the job seeker record from the list, this designation can be reapplied, via job seeker Actions tool.



REQUISITION WIDGET LISTS



Longest Open Requisitions

Longest Open Requisitions		
REQ #	JOB TITLE	OPEN SINCE
2017-007	Accountant	1 year ago
2018-008	Information Security Analyst	24 weeks ago
2018-013	Accountant (mid level)	23 weeks ago
2018-011	Information Systems Manager	23 weeks ago
2018-033	Computer Systems Manager	16 weeks ago

Many recruiters and managers get concerned when there is backlog of unfilled positions or unattended requisitions linger in the system. Therefore, the **Longest Open Requisitions** widget displays these items on the Dashboard, as a reminder. Organized as a table, the object identifies each Open requisition by Requisition Number, Job Title, and number of days open, from oldest to most recent. The underlying requisition can be accessed from a hyperlink in each listing.

Newly Posted Requisitions

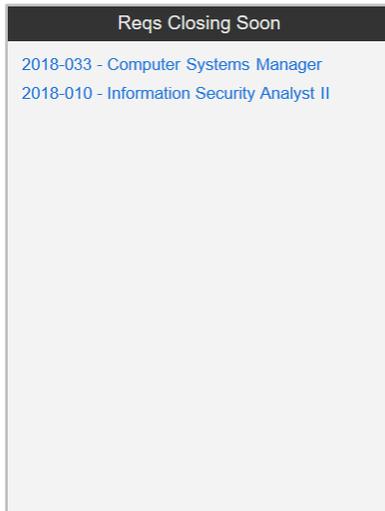
Newly Posted Requisitions	
10/05/2018	2018-017 - Administrative Services Manager
10/05/2018	2018-016 - Architectural / Engineering Manager
10/05/2018	2018-012 - Accountant / Auditor
10/05/2018	2018-011 - Compensation Benefits Manager
06/01/2018	2018-033 - Computer Systems Manager

To help prepare for, hopefully, an incoming rush of job seekers (or other requisition tasks), the **Newly Posted Requisitions** widget informs you of up to the last 20 job postings that have gone live. "Posted" indicates the requisition is Open, and (2) the posting Start Date has been reached.

This tile is particularly helpful if your organization relies on automated posting. Each entry is identified by date (in descending order with the most recent requisition first), plus Requisition Number and job title, with the latter serving as a link to the requisition record. The list can be customized for date range and maximum number of entries, among other settings.



Requisitions Closing Soon

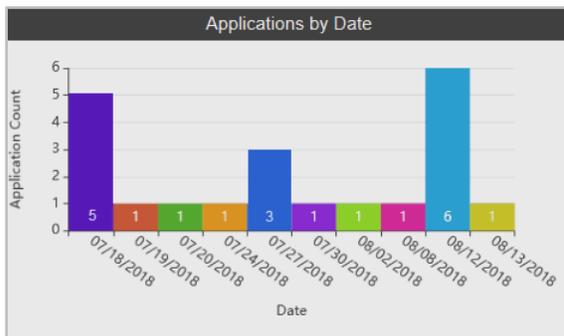


Based on closing date entries, the **Requisitions Closing Soon** widget (or **Reqs Closing Soon** for short) alerts you to requisitions that are closing within the next two weeks. By clicking on an appropriate link here, you can review a requisition with an approaching end date and access its detail record, including the **Posting Dates** tab.

REQUISITION GRAPHS AND COUNTER TILES

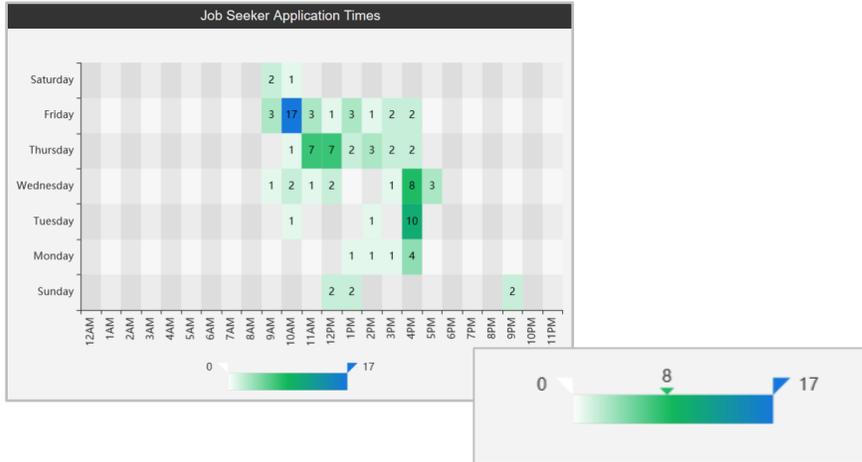


Applications by Day Graph



The **Applications by Day** graph is a popular offering for displaying a longstanding **balanceTRAK** metric. For a customizable 10-day period, actual or relative, each column signifies the number of completed Applications (and/or Prescreeners) received on that day.

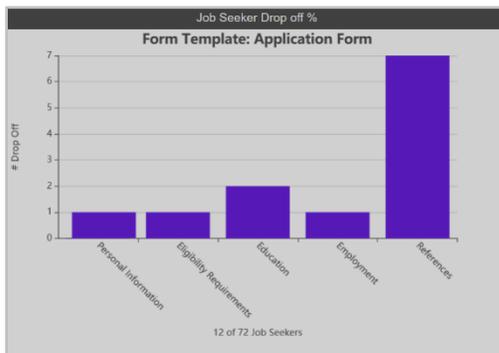
These statistics can be lined up with days of the week or job announcement releases to track applicant trends. In addition, a job seeker list, filtered to the underlying job seekers, can be accessed by clicking the desired column within the chart.



Job Seeker Application Times Graph

As a companion to the **Applications by Day** graph, the **Job Seeker Application Times** table delves within each day to find the hours during which completed Application and/or Prescreener responses are received. Responses per hour, in numbers are highlighted with color on a range from pale green to medium blue, indicating the lowest-to-highest response times. When the mouse is hovered over an entry on the chart, the lower scale will show the selected result relative to the lowest and highest recorded results.

Percent Drop-Off Graph

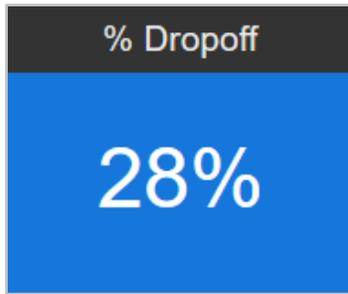


When job seekers fail to complete the Application process, it is important to understand the point at which they leave the Application portal (or fail to complete the Prescreener). Accordingly, the **Percent Drop-Off** graph compiles a statistical look at job seekers by exit point in the Application form (or Prescreener), as indicated by the last form section left incomplete.

For open positions that are difficult to fill (see the **Time to Fill** widget, below), this “drill-down” information can let you know which Form section may be a “hurdle” for potential job seekers, leading to further analysis and if necessary, form or process improvements.



Percent Drop-Off Tile



To quickly learn the drop-off rate across the entire application process,* this is the “go-to” tile: The **Percent Drop-Off** tile simply shows the mathematical result of dividing the total Job Seekers who applied by the number who failed to complete the process.

*If a job seeker does not complete all requested forms (for example, Prescreener, Application, Assessment, Self-Identification, and Background Check) OR is knocked out from consideration, he or she will be counted in this statistic.

With one click on this tile, the comprehensive *Drop-Off Rates* report opens in a new window, showing the numbers of job seekers who completed and failed to complete the Application by requisition. Numbers and percentages are also indicated on the report for locations or departments, as applicable.

Requisitions by Category Tile (Pending, Open, Closed)



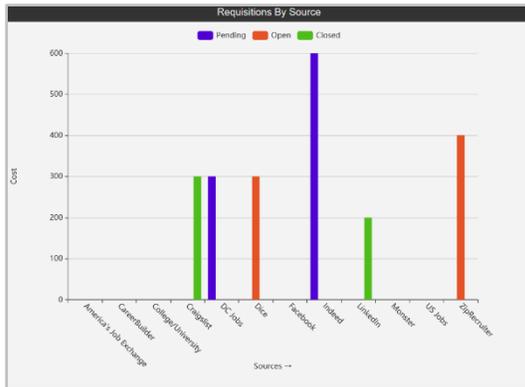
The fully customizable **# (Number) of Reqs** tile sums up a statistic for an identified subset of requisitions by status Category, such as those denoting currently Open job postings – or for another example, number of Pending requisitions for which requested approvals remain due.

Both the title and the underlying settings can be configured to account for any combination of Pending, Open, and/or Closed requisitions, plus this status data can be limited by location or department (as applicable). In meeting these various needs, you may also develop and label multiple counters for placement on the Dashboard.

To help you understand how many jobs need to be filled, a customization example is the **# of Open Requisitions** tile. This example would count requisitions in the Open Category, the period during which the job opening is posted on line, and job seekers can apply.

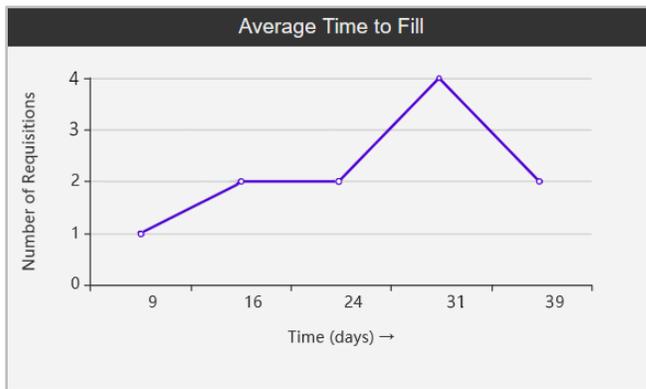


Requisitions by Source Graph



For all recruiting sources (the default setting) or a select few, the **Requisitions by Source** graph shows where the job openings are being posted, whether the source is a popular job board, Facebook, or a college/university. The color-coded graph displays all status Categories by default, but this parameter can be customized to include or exclude Pending, Open, or Closed requisitions, along with the date range.

Time to Fill Graph



This **Time to Fill** graph tracks the number of days it takes to fill a job opening, from the date the requisition is opened until a hire date is entered into **balanceTRAK**. On a line graph, the number of requisitions is correlated to time in days, although the graph can be customized to show the time factor in larger increments (e.g., weeks).

When the mouse is hovered over a result the data points can be tracked with grid lines in relation to the x- and y-axes, and a detail caption lists the numerical data points.