



Solution Usage Tracking

Guide to Tracking and Reporting Usage for TalentCentral Solutions



Solutions

Your organisation has recently purchased a Solution package from SHL. Our Talent Solutions equip you to make unbiased, data-driven people decisions throughout the employee lifecycle, helping you anticipate change, adapt quickly, and maximize opportunities.

What does this mean for you?

SHL has created a corresponding project tag for each Solution purchased. These tags will appear on any new project you create and, by selecting the relevant tag, your organisation will be able to accurately track and report the usage of the Solution/s. To further ensure reporting is as precise as possible, we have made it mandatory for administrators to select a Solution tag when creating a project. Reports showing the usage against project tags will be made available to specific administrators through the new 'Extranet' file delivery service that has been enabled on your account.

Using Solution Project Tags

Tagging a Solution project

Once your organisation has purchased a Solution, you must select a corresponding project tag in the basic settings when creating a new project. The mandatory project tag is called *Solution* (marked with an asterisk), and the project tag value will reflect the Solution purchased

The screenshot shows the 'Basic Settings' form for a project. The 'Project Name' is 'e.g., Java developer hiring' and the 'Deadline Date' is 'mm-dd-yyyy'. The 'Project Tags' section is expanded, showing a search bar and a list of tags. The 'Solution*' tag is selected, and its value is set to 'Volume Advanced'. Other tags visible include 'Graduate Essential' and 'Managerial Essential'.

For example, to create a project as part of the Volume Advanced Solution, select the project tag of *Solution*, and the tag value of *Volume Advanced*.

If you have multiple Solution orders on your account, you may have multiple tags values to choose from. If you are unsure which tag value to use, please speak with your HR team or your SHL representative.

The screenshot shows the 'Basic Settings' form with the 'Solution*' tag selected and the value 'Volume Advanced'. The 'Location*' tag is also selected with the value 'Italy'. Other tags visible include 'Graduate Essential' and 'Managerial Essential'.

It is possible to assign more than one project tag to a project.

If your organisation has an existing policy which uses project tags this will not alter.

The remaining project set up is unchanged.



Tagging a project which is not part of a Solution

You may have an order on your account which is not part of a Solution purchase, and if this is the case SHL has created a tag value on your account labelled *Unspecified*.

The Solution project tag must still be selected, with the tag value of *Unspecified*. If you are unsure which tag value to use, please speak with your HR team or your SHL representative.

It is possible to assign more than one project tag to a project. If your organisation has an existing policy which uses project tags this will not alter.

The remaining project set up is unchanged.

Tracking Solution Usage

Solution usage data is available to specific administrators through the new 'Extranet' file delivery feature now enabled on your TalentCentral account. It will *not* display in the standard usage report: Usage by Project Tag located on the Usage Statement page in Account Settings. Please note, there is no record of Solution Orders shown on the table found under Orders in Account Settings either.

Extranet Reporting

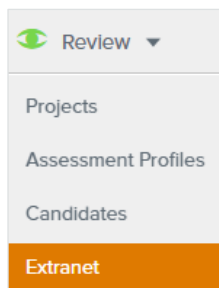
Extranet is a file delivery service that may be new to some users. SHL can subscribe your account to receive data reports at regular intervals. By default, this will be monthly.

For Solution usage tracking your account has been subscribed to receive a monthly report called *Order Subscription Details* scheduled to run on the 1st day of the month. To adjust the frequency of the reporting period please contact your SHL account representative.



Accessing Extranet Reports

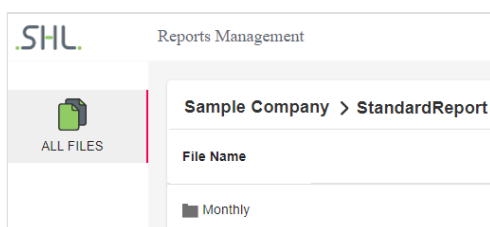
Access to Extranet reporting is controlled at user level. SHL has enabled this reporting feature for active Company Super Users on your account.



When activated for a user, a new option is available under the Review tab called *Extranet*.

Click on *Extranet* to open a new tab called *Reports Management*.

All Extranet reports generated for your TalentCentral account are located here.



Click on *All Files* on the left, and then the folders *StandardReport*, and *Monthly*.

This folder contains all scheduled reports that have been generated.

Sample Company > StandardReport > Monthly			
File Name	Last Modified	File Size	
ORDER_SUBSCRIPTION_DETAILS-1615808436458.csv	Mon Mar 15 2021 11:40	0.3 KB	

To download a report, click on the download arrow icon on the far right.

Files are automatically generated as in .xls format. To adjust the format to .csv or .pdf format please contact your SHL account representative.

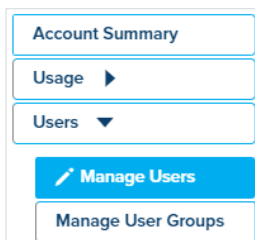
Should SHL generate any ad-hoc reports for your organisation, these will be displayed in a folder called *Custom*

Sample Company > Custom		
File Name	Last Modified	File Size
ORDER_SUBSCRIPTION_DETAILS-1615808436458.csv	Mon Mar 15 2021 11:40	0.3 KB
ORDER_SUBSCRIPTION_DETAILS-1615898251956.xlsx	Tue Mar 16 2021 12:37	8.9 KB



Granting User Access to Extranet Reporting

Access to *Extranet* is controlled for your account at a user level, meaning administrators may or may not be granted permission to access *Extranet*. By default, SHL has granted this permission to active Company Super Users. Company Super Users and Company Admins with permission to access *Extranet* can then give access to other users and remove access if required.



This is done by editing their user profile from *Account Settings*, then *Manage Users*.

Check the option to *Enable Extranet* on the bottom left and *Save*.

For any further guidance and support, please contact your SHL account representative

