Solution Usage Tracking

Guide to Tracking and Reporting Usage for TalentCentral Solutions

Version: 1.2 | Last updated 31 January 2022 |

Solutions

Your organisation may have recently purchased a Solution package from SHL. Combining SHL's products, services, insights and candidate experience, these defined packages are designed for a particular use case such as hiring talent for managerial, graduate, or technology roles.

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.

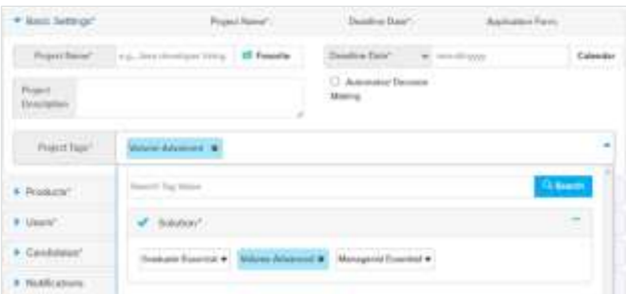
If your organisation has purchased a Solution, what does this mean for you as a TalentCentral user?

SHL will have created a corresponding project tag for each Solution purchased. These tags will appear on all projects 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 (as denoted by an asterisk). 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 in a new 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

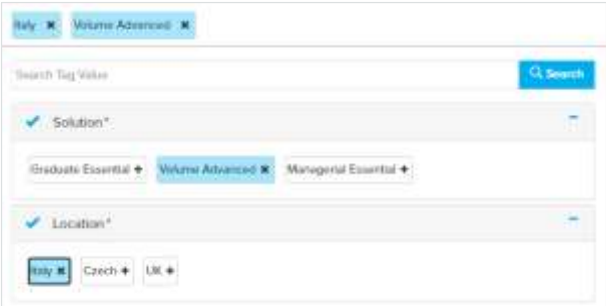


For example, to create a project as part of the Volume Advanced Solution, select the project tag of *Solution**, and the tag value of *Volume Advanced.*

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.

Assigning Multiple Tags

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



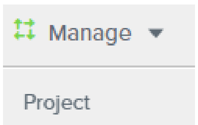
For example, to create a project as part of the Volume Advanced Solution, which is also assigned to the Tag Italy, select the project tag of *Solution** and the tag value of *Volume Advanced.*

Then select the project tag of *Location** and the tag value of *Italy.*

The remaining project set up is unchanged.

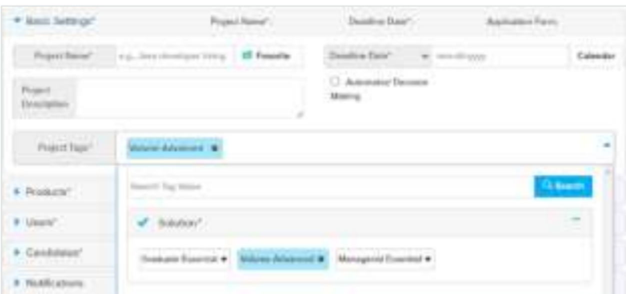
Tagging a Solution using an existing project

If you would prefer to continue using an existing project which meets the product requirements of your new Solution, it is possible to simply add the relevant *Solution** tag to the existing project.



From the Menu bar select *Manage, Project*.

Locate your project using the available filters, then click on the project name.



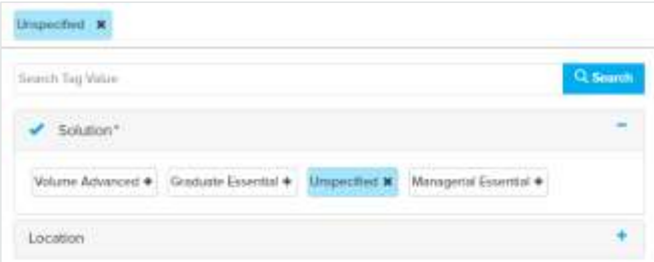
To assign a project as part of the Volume Advanced Solution for example, select the project tag of Solution*, and the tag value of Volume Advanced.

Click on *Update Project* to save your changes.

Your existing project will now accurately track against your purchased Solution.

Tagging a new 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.

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.

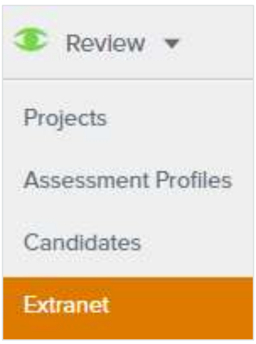
Extranet Reporting

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.



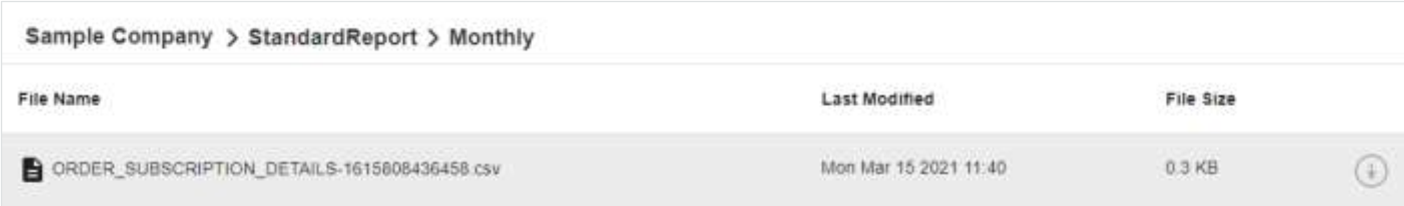
When activated for a user, a new option is available under the Review tab called *Extranet*.

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.



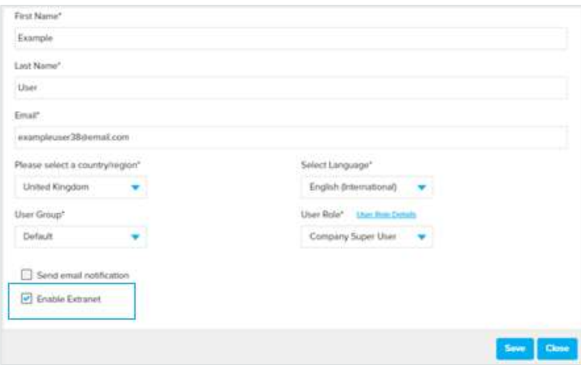
To download a report, click on the download arrow icon on the far right.

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

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.

