ENGAGE

Customizing your Bullhorn data, from collection to reporting

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Wouldn't it be great if you could customize the data inside Bullhorn?

Collect it from users on your own?

AND run a report on it?

Examples:

Equipment Provisioning

Data Collection:

Equipment Provisioning

CANDIDATE	Sarah Niles
COMPANY	Acme Corp
START DATE	07/01/2018
NEEDS LAPTOP?	Yes No
NEEDS PHONE?	Yes No
SPECIAL REQUESTS	Accessibility requirements, preferences, etc.

SAVE

Report:

Equipment Provisioning

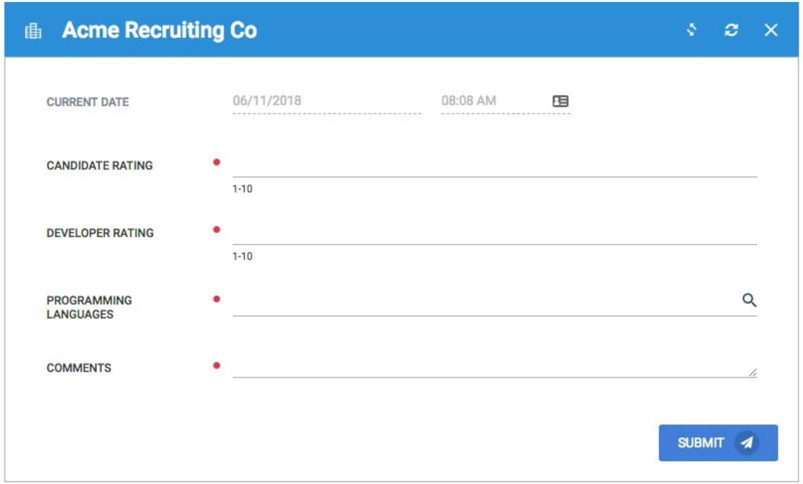
Acme Corp Equipment | Candidate Start Date: 7/1/2018

Item	Count	Placements	Special Requests
Laptop	4	Sarah Niles, Pam Beasley, Jim Halpert, Kelly Kapoor	Sarah Niles - Needs external monitor
Phone	3	Sarah Niles, Pam Beasley, Kevin Malone	Pam Beasley - receptionist, needs headset

Examples:

Interview Feedback

Data Collection:

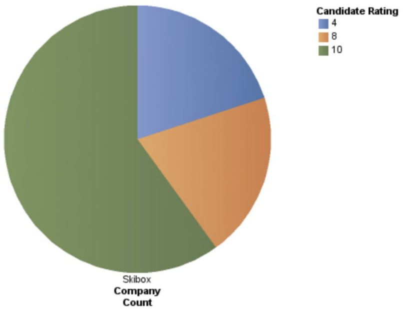


Report:

Demo - Candidate Rating by Company

Skibox [13276]

Number of Ratings	Average Rating	1s	2s	3s	4s	5s	6s	7s	8s	9s	10s
5	8.4	0	0	0	1	0	0	0	1	0	3



Date Filled Out	Candidate Rating	Comments
Jan 19, 2018 1:08:43 AM	4	Show Comments
Feb 14, 2018 6:29:09 PM	10	Show Comments
Feb 26, 2018 1:38:34 PM	10	Show Comments
Mar 13, 2018 8:07:54 PM	8	Show Comments
Apr 2, 2018 3:28:12 AM	10	Show Comments

3 Steps to make this a reality

1. Configure your data storage inside Bullhorn
2. Build a tool to collect this data

   Bonus points for using Bullhorn's Open-Source tools!
3. Use Bullhorn Canvas to build a custom report

Data Storage in Bullhorn With Custom Objects

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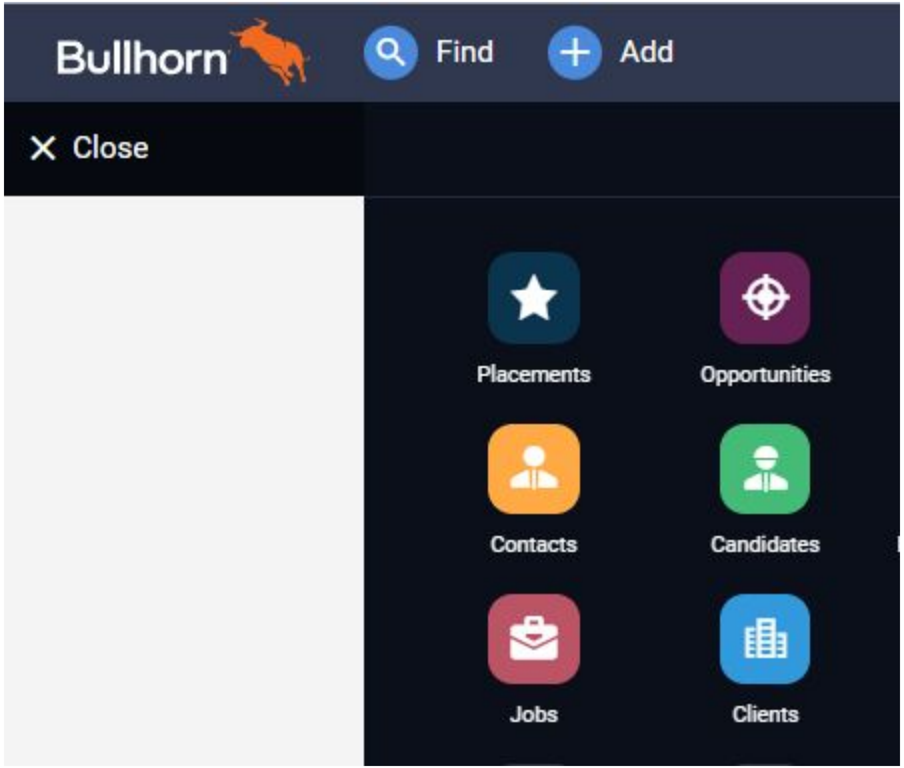
customText1	☐	candidate Rating 2	**Float**	☐	☑	1	**05/18/2017 09:38 AM**
customText11	☑		Drop Down	☐	☐	106	05/08/2017 11:35 AM
customTextBlock1	☐	Interview Date	Text Block	☐	☑	740	01/05/2016 04:56 PM
customText4	☐	interview date 2	Text	☐	☐	5030	04/22/2016 03:50 PM
customText5	☐	Interview company	Text	☐	☐	5040	04/13/2017 09:24 AM
customText10	☐	Interview Company 2	Section Header	☐	☐	5040	04/13/2017 09:24 AM
customTextBlock2	☐	Testing the html	DHTMLEditor	☐	☐	5060	04/25/2016 02:32 PM
customTextBlock3	☑	test	Text Block	☐	☐	5070	12/13/2016 11:18 AM
customText12	☐	candidate Rating 3	Mini Picker	☐	☑	8000	11/03/2016 01:26 PM
customText9	☑	customText9	Check Box	☐	☑	8000	12/14/2016 09:30 AM
customTextBlock4	☐	developer Rating	Text Block	☐	☐	5080	04/13/2017 09:24 AM

Custom Object Features

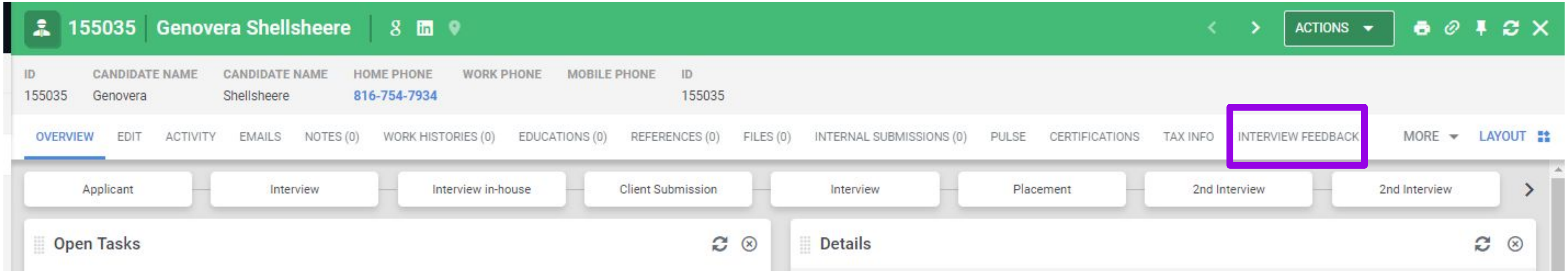
Entities for Custom Objects

- Candidates
- Contacts
- Placements
- Jobs
- Companies
- Opportunities



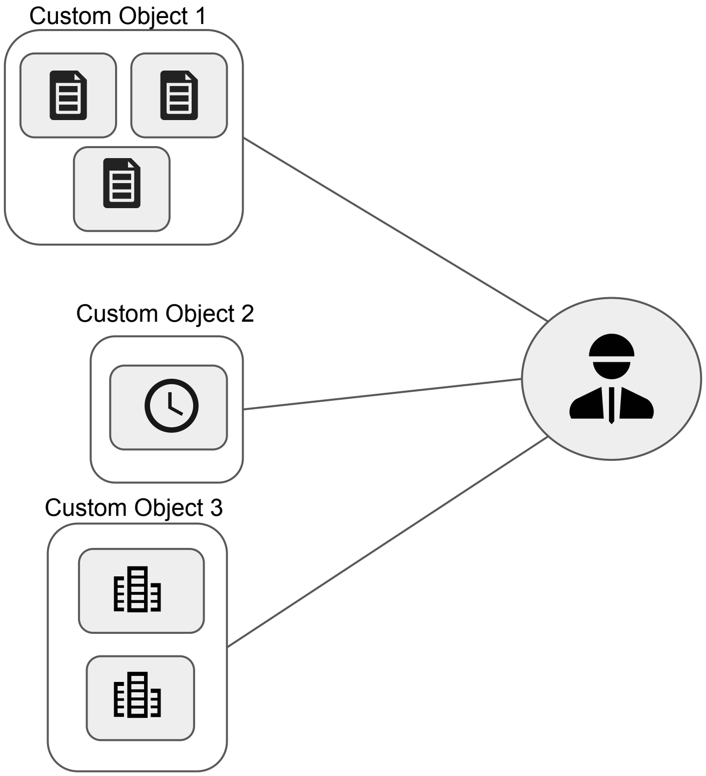
Additional Fields

- Each Custom Object adds up to 55 fields
- You are able to add a new record tab
- Custom Objects can also be added inline to the edit tab or Overview tab

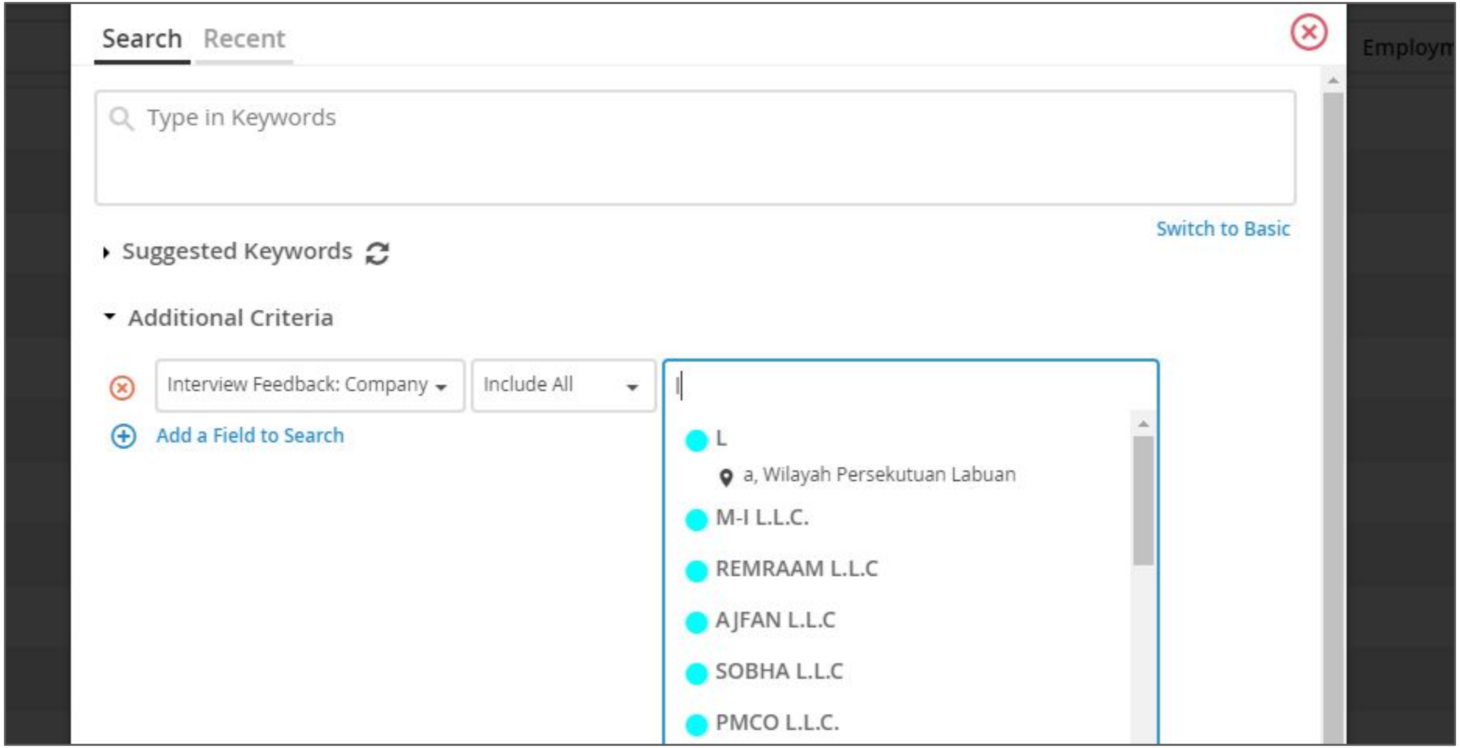


Custom Object Structure

- Multiple Entries per Custom Object
- Custom Objects can be used for separate business goals



Custom Objects are Searchable



Requesting a Custom Object

Easy as 1...2...3!

1. Fill out Custom Object Spreadsheet
2. Submit the spreadsheet to Bullhorn Support
3. Done!

Entity/Location/Tracks (if applicable):	Candidate
Name of Custom Object:	Interview Feedback
Would you like it in it's own tab or on a custom card?	Own Tab
Do you want this object to be searchable?	Yes
What departments should be able to view (but not edit) the Custom Object?	
What departments should be able to both view and edit the Custom Object?	BH 2017

Field display name	Description	Hint	Required?	Edit Type	Field Values (if applicable)
Date Filled Out			Yes	Date/Time	
Candidate Rating	(1-10)		Yes	Integer	
Developer Rating	(1-10)		Yes	Integer	
Programming Languages			Yes	Mini Picker	
Comments			Yes	Text Block Large	
Company			Yes	Picker:Client Corporation	

Available Field Types

- Check Box
- Date Input
- Time Input
- Radio Input
- Drop Down
- Text Input
- Float Input
- Integer Input
- Money
- Text Block
- DHTML Editor
- Entity Picker
- Mini Picker
- Section Header

Using BH Tools to Collect Data

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Novo-elements

UI elements library designed by the Bullhorn UX team
bullhorn.github.io/novo-elements

Bullhorn
NOVO DESIGN SYSTEM

Taurus

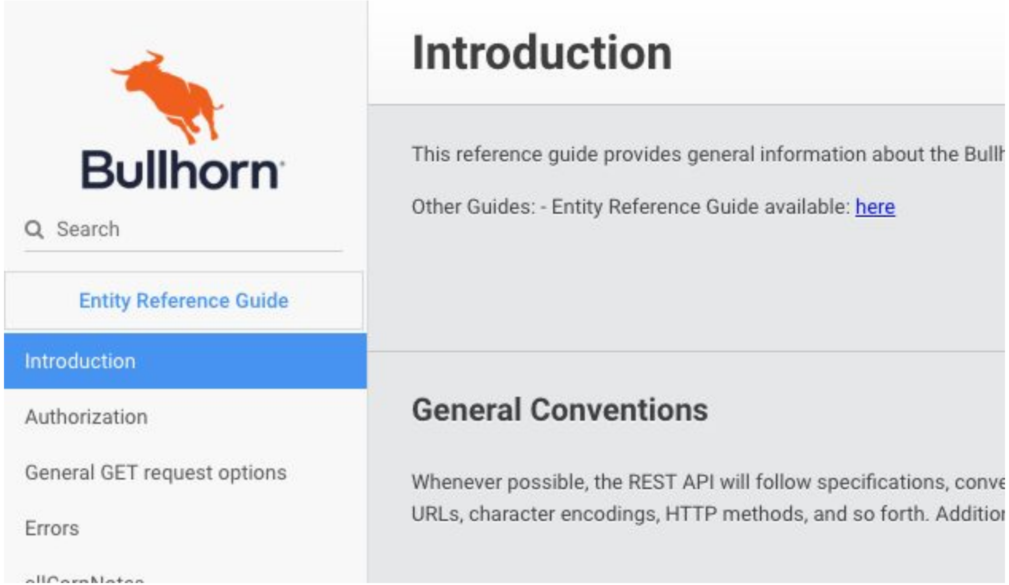
The official Typescript client library for connecting to Bullhorn REST API

github.com/bullhorn/taurus

REST API Docs

Everything you need to know to use BH's REST API

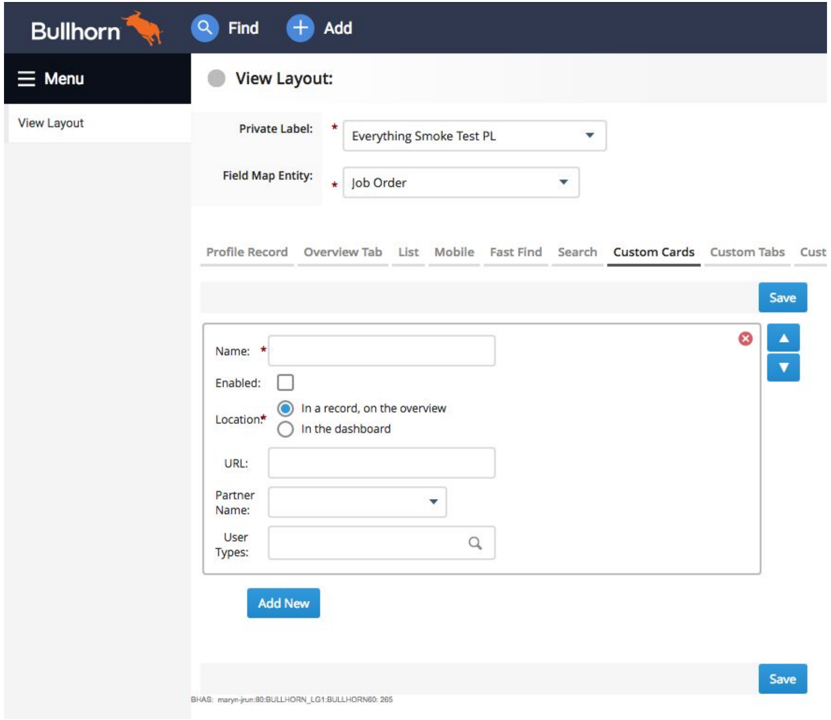
bullhorn.github.io/rest-api-docs



Cool Tools

- Connect: Utility that gives you access to open entities, interact across pages, and more
  github.com/bullhorn/connect
- Bullhorn-Types: Entity Utils and Typescript Interfaces for the Bullhorn REST Api
  github.com/bullhorn/taurus
- Platform Extension Starter: Starter repository for extensions for Bullhorn 2017
  github.com/bullhorn/extension-starter
- Bullhorn Custom Cards & Tabs: Custom extensions inside Bullhorn

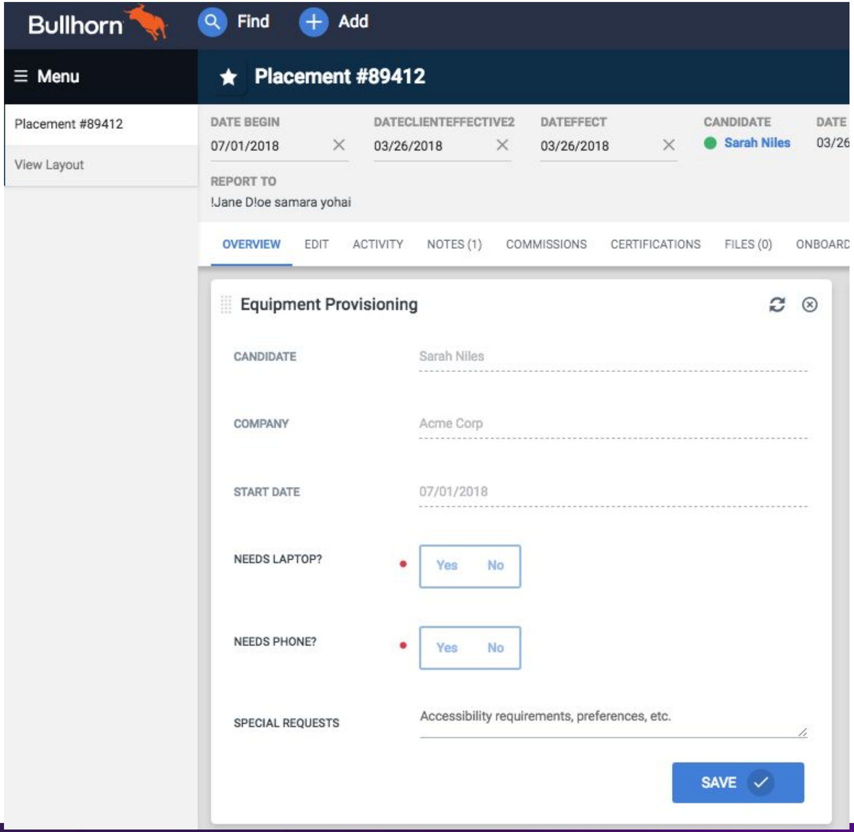
Custom Cards & Tabs



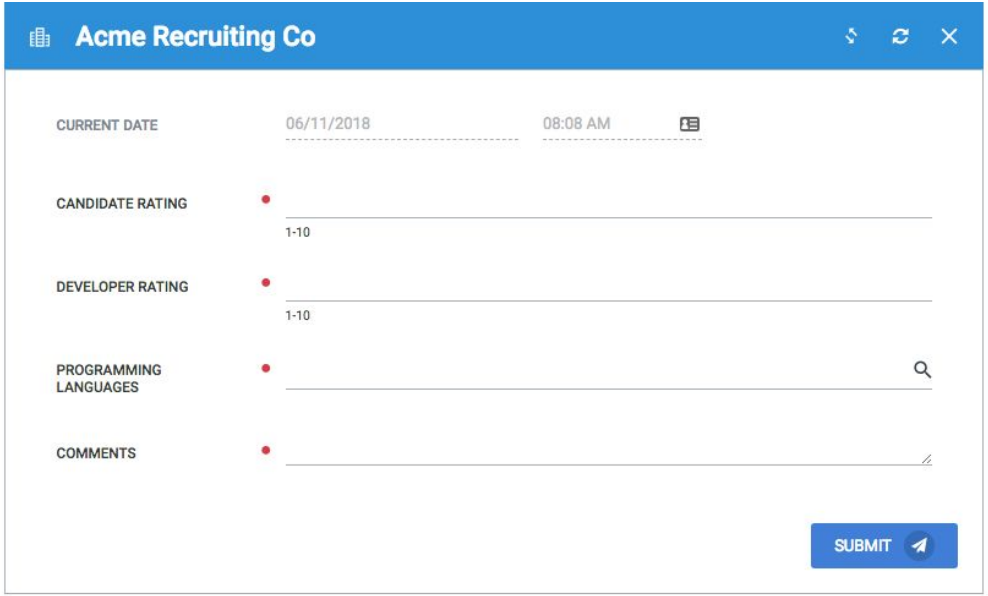
- Use Taurus to interact with BH API client-side
- Use Novo-Elements AppBridge to interact between pages, open new bowling alley tabs, etc.
- How to add
  - View Layout
  - Custom Cards or Custom Tabs
  - Add new

Example 1: Equipment Provisioning

Tools used: Extension Starter, Novo-Elements, Taurus, Custom Cards



Example 2: Interview Feedback



Tools used: Novo-Elements, REST API

Custom Reports in Bullhorn Canvas

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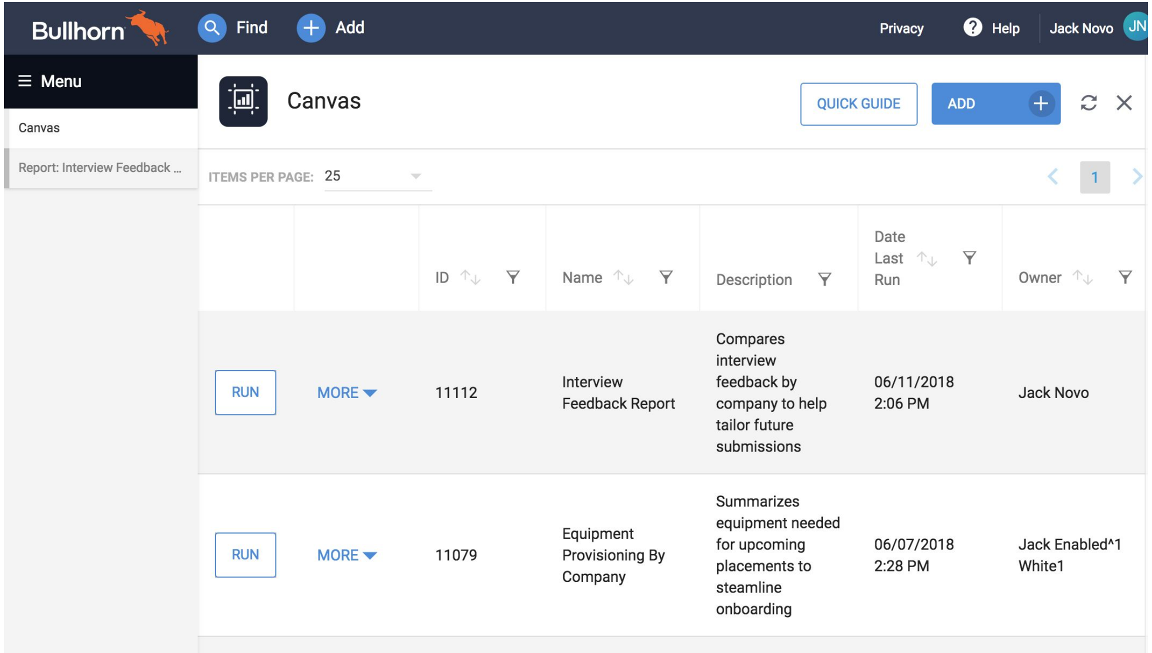
What's Bullhorn Canvas?

Fully custom reports that you can run anytime, covering any date range



Canvas gives you...

- Access to all Bullhorn data (including custom objects)
- Multi-entity
- Respects Field Maps & Entity Names
- Full control over reports and visualizations (customizable, custom fields)
    - Graphs, Charts, Lists - tons of visualizations to choose from
- As complex as needed - fully customizable reports

Pre-Built Sample Reports

1. Notes Activity: A sample note count report that can be run for a specified date range and one or more departments.
2. Sales Activity: A sample activity report that can be run for a specified date range. Activity is attributed to departments based on the user who owns the client contact/job.
3. Recruiting Activity: A sample activity report that can be run for a specified date range and 'Activity By' attribution. Activity can be attributed to departments based on either the user who performed the action in the system (activity author) or by the user who owns the candidate.

Bonus for Healthcare Companies:

Expiring Credentials: Gives insight into credential expirations, contact details for providers and identifying any credentials that will expire before the end of the assignment. Credentials in this report are only those tied to placement records.

Even better, you can....

- Build a report to take parameters so you can target your results
- Automate regular delivery to key team members or departments
- Control the privacy of the report - keep it private, make it public, share with certain individuals

BBO in Canvas

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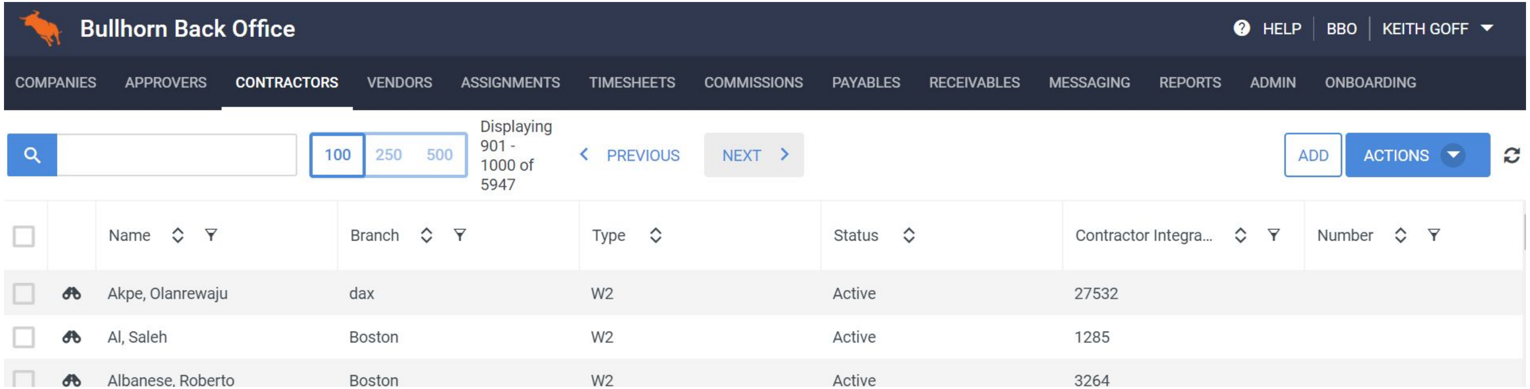
What is BBO?

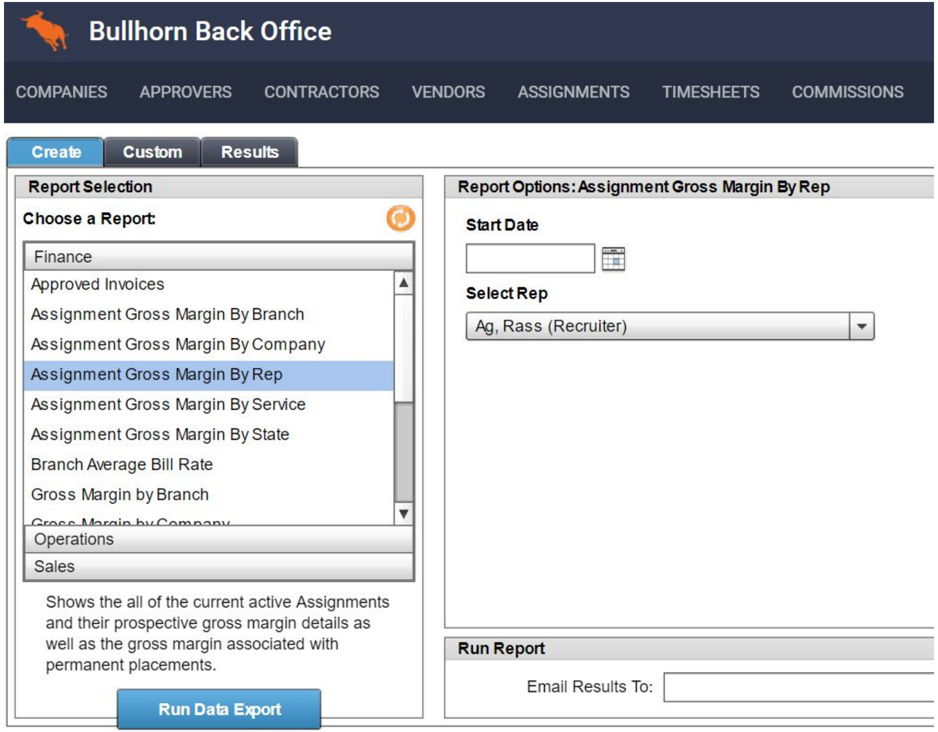
Bullhorn Back Office(BBO) is…

- Timesheets
- Invoicing
- Employee/Vendor Onboarding

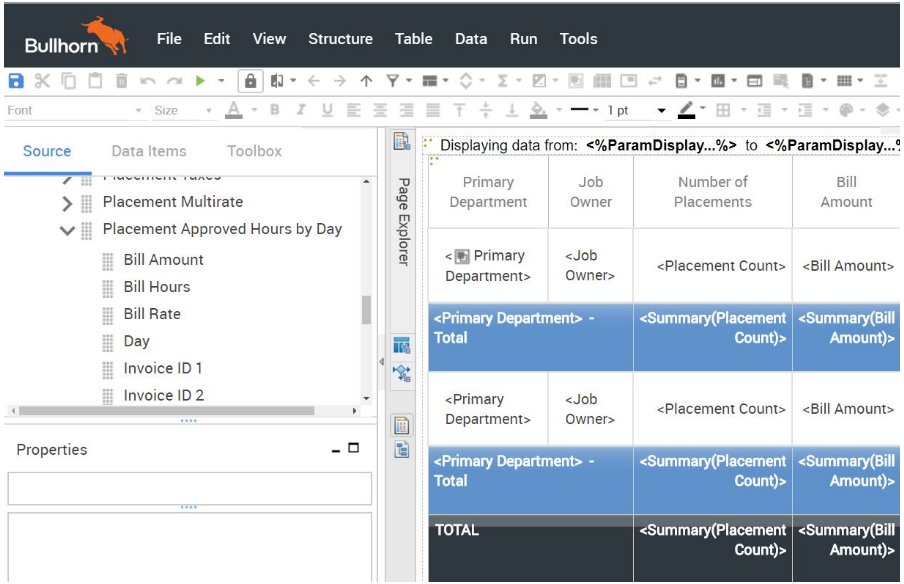


The Problem

BBO has basic reporting capabilites built in, but lacks a full featured business intelligence tool.



The Solution



Create an integration between BBO and the ATS so that time and expense data can be reported on in Canvas.

What Syncs Over?

A timesheet when...

- Approved
- Updated with an invoice number

An invoice when…

- Approved
- Paid status is updated

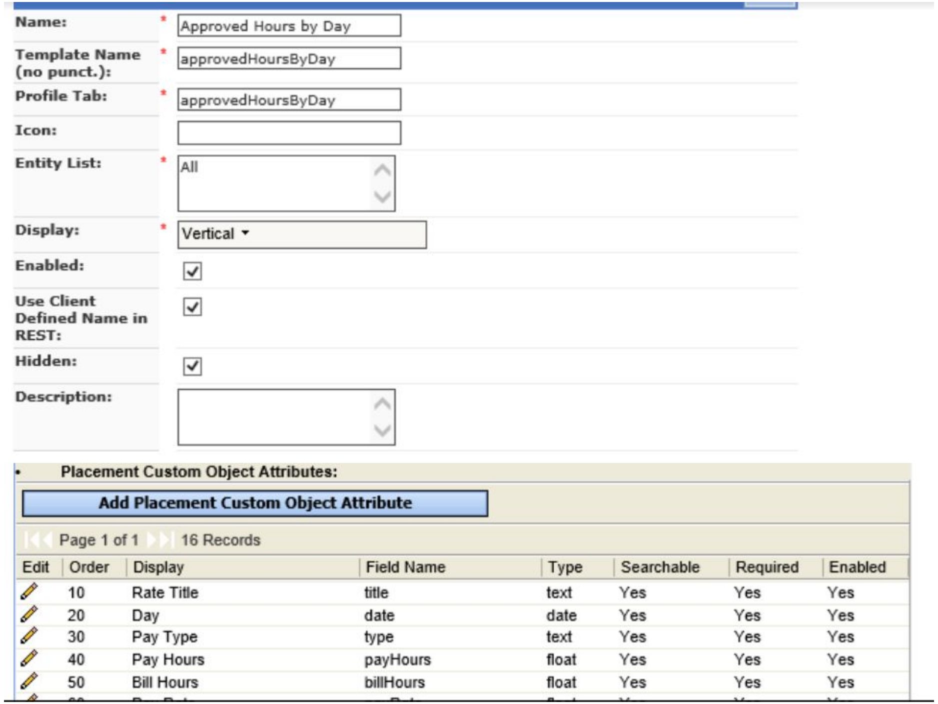
Remove data when…

- A timesheet is unapproved, unsubmitted, rejected, or delete
- An invoice is unapproved or deleted

Timesheet Custom Object

Approved Hours by Day

- Rate Title
- Day
- Pay Type
- Pay Hours
- Bill Hours
- Pay Rate
- Bill Rate
- Pay Amount
- Bill Amount
- ID
- Start Date
- End Date
- Invoice ID
- MultiRate



Name: * Approved Hours by Day
Template Name (no punct.): * approvedHoursByDay
Profile Tab: * approvedHoursByDay
Icon:
Entity List: * All
Display: * Vertical
Enabled: ☑
Use Client Defined Name in REST: ☑
Hidden: ☑
Description:

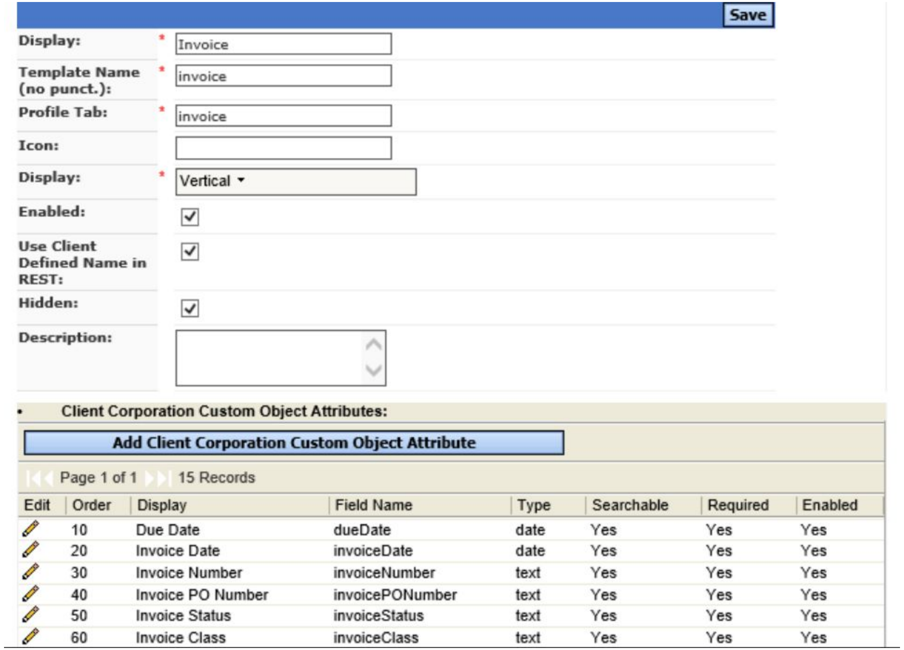
Placement Custom Object Attributes:

Add Placement Custom Object Attribute

Page 1 of 1 16 Records

Edit	Order	Display	Field Name	Type	Searchable	Required	Enabled
	10	Rate Title	title	text	Yes	Yes	Yes
	20	Day	date	date	Yes	Yes	Yes
	30	Pay Type	type	text	Yes	Yes	Yes
	40	Pay Hours	payHours	float	Yes	Yes	Yes
	50	Bill Hours	billHours	float	Yes	Yes	Yes

Invoice Custom Object



Save

Display:	*	Invoice
Template Name (no punct.):	*	invoice
Profile Tab:	*	invoice
Icon:		
Display:	*	Vertical
Enabled:		☑
Use Client Defined Name in REST:		☑
Hidden:		☑
Description:		

- Client Corporation Custom Object Attributes:

Add Client Corporation Custom Object Attribute

Page 1 of 1 15 Records

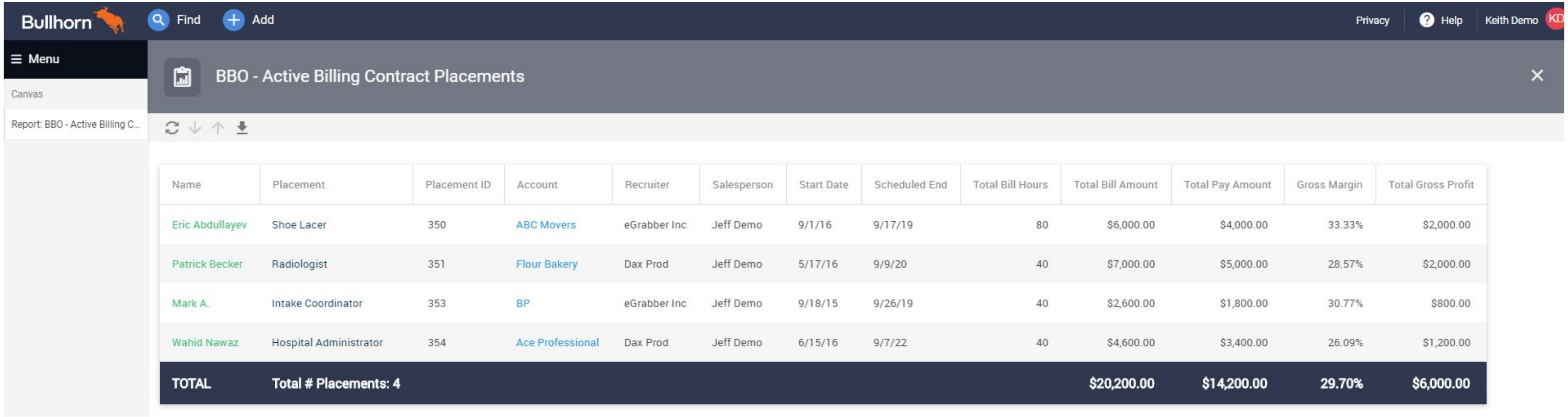
Edit	Order	Display	Field Name	Type	Searchable	Required	Enabled
	10	Due Date	dueDate	date	Yes	Yes	Yes
	20	Invoice Date	invoiceDate	date	Yes	Yes	Yes
	30	Invoice Number	invoiceNumber	text	Yes	Yes	Yes
	40	Invoice PO Number	invoicePONumber	text	Yes	Yes	Yes
	50	Invoice Status	invoiceStatus	text	Yes	Yes	Yes
	60	Invoice Class	invoiceClass	text	Yes	Yes	Yes

Invoice

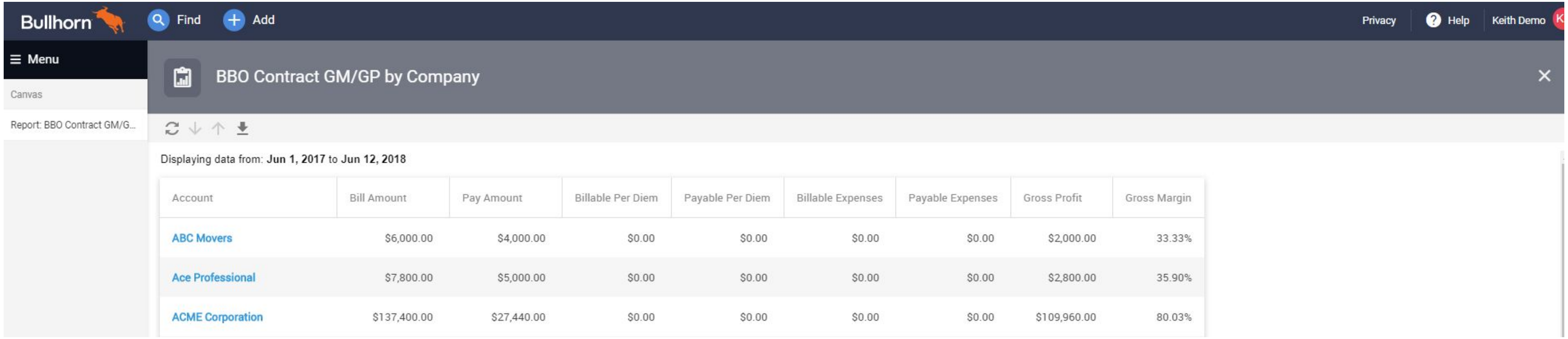
- Due Date
- Invoice Date
- Invoice Number
- PO Number
- Status
- Class
- Invoice ID
- Subtotal

- Taxable total
- Total Discount
- Total Surcharge
- Tax Amount
- Total
- Paid Status
- Contact Name

Example Reports



Name	Placement	Placement ID	Account	Recruiter	Salesperson	Start Date	Scheduled End	Total Bill Hours	Total Bill Amount	Total Pay Amount	Gross Margin	Total Gross Profit
Eric Abdullayev	Shoe Lacer	350	ABC Movers	eGrabber Inc	Jeff Demo	9/1/16	9/17/19	80	$6,000.00	$4,000.00	33.33%	$2,000.00
Patrick Becker	Radiologist	351	Flour Bakery	Dax Prod	Jeff Demo	5/17/16	9/9/20	40	$7,000.00	$5,000.00	28.57%	$2,000.00
Mark A.	Intake Coordinator	353	BP	eGrabber Inc	Jeff Demo	9/18/15	9/26/19	40	$2,600.00	$1,800.00	30.77%	$800.00
Wahid Nawaz	Hospital Administrator	354	Ace Professional	Dax Prod	Jeff Demo	6/15/16	9/7/22	40	$4,600.00	$3,400.00	26.09%	$1,200.00
TOTAL	**Total # Placements: 4**								**$20,200.00**	**$14,200.00**	**29.70%**	**$6,000.00**



Account	Bill Amount	Pay Amount	Billable Per Diem	Payable Per Diem	Billable Expenses	Payable Expenses	Gross Profit	Gross Margin
ABC Movers	$6,000.00	$4,000.00	$0.00	$0.00	$0.00	$0.00	$2,000.00	33.33%
Ace Professional	$7,800.00	$5,000.00	$0.00	$0.00	$0.00	$0.00	$2,800.00	35.90%
ACME Corporation	$137,400.00	$27,440.00	$0.00	$0.00	$0.00	$0.00	$109,960.00	80.03%

Next time you say, “I wish I could access that in Bullhorn,” use Custom Objects, Bullhorn’s Developer Tools, and Canvas reports to make it a reality.

Let’s see it in action!

Interview Feedback Walkthrough: All the way from Collection to Report

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Questions?

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