

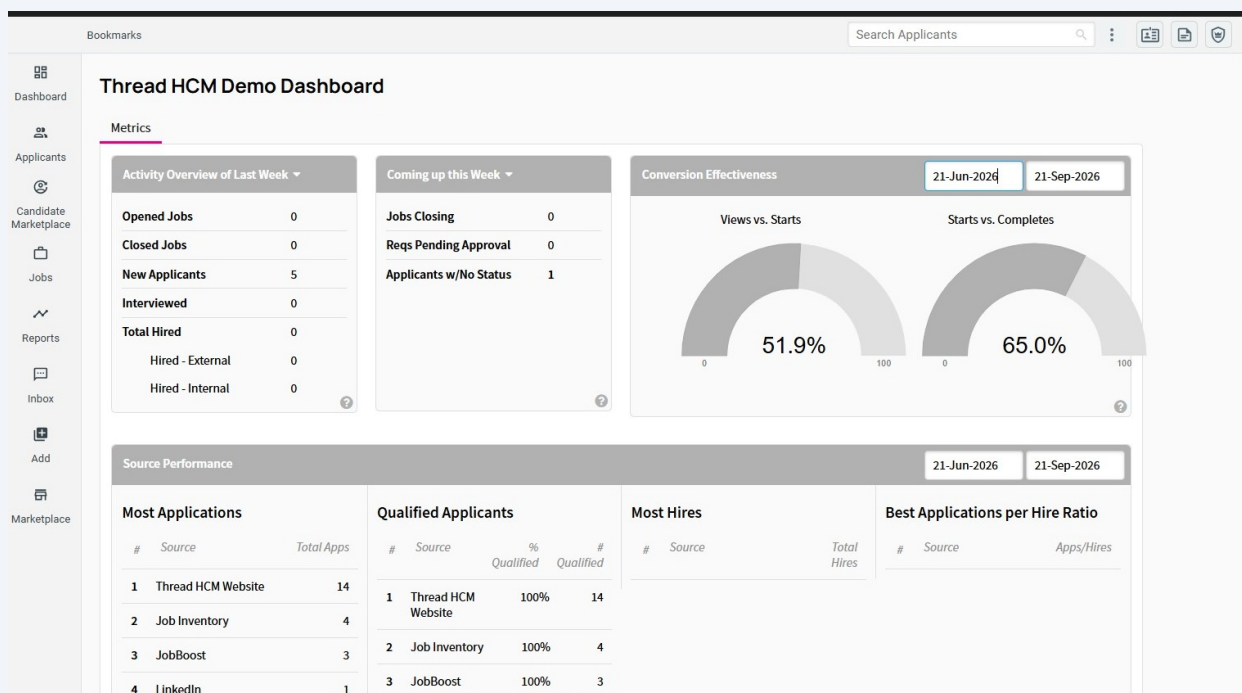
Run or Create a Report in ATS (Applicant Tracking/iHire)



Learn how to navigate the report builder to generate detailed applicant information for your job listings. This guide simplifies the process of creating custom reports to help you track candidate data effectively.

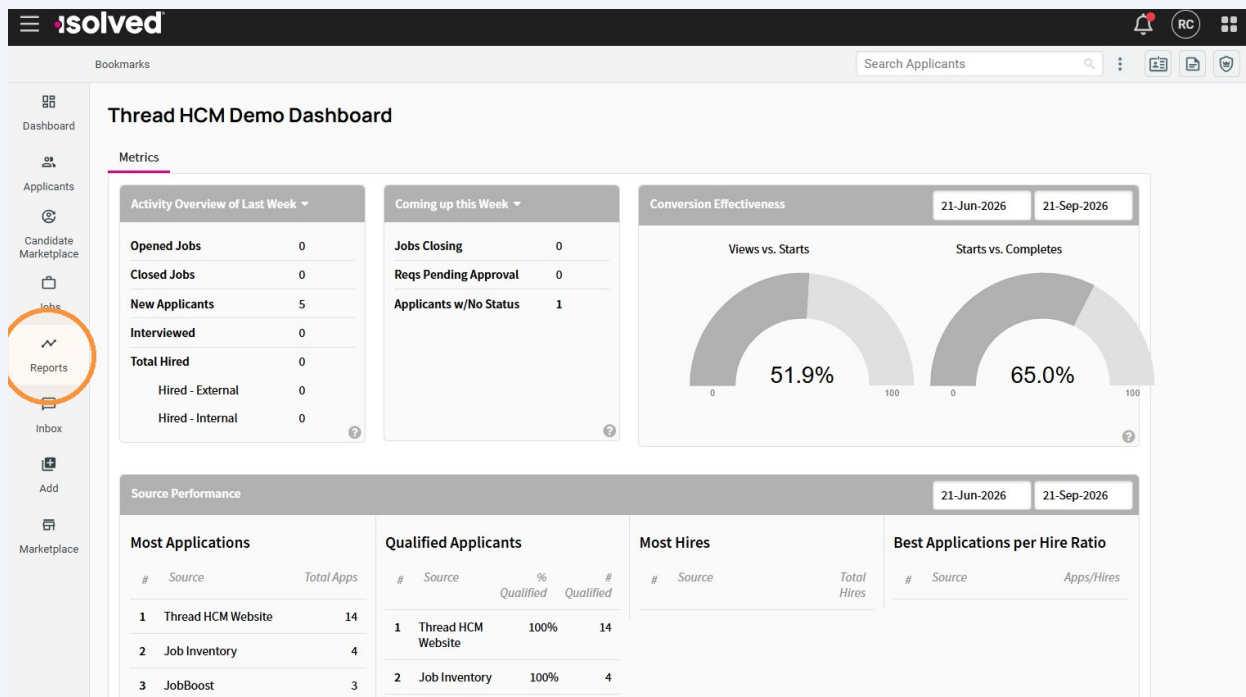
1

Navigate to Applicant Tracking via isolated, or the identity login. If you don't have access but think you should, please contact your Account Manager.

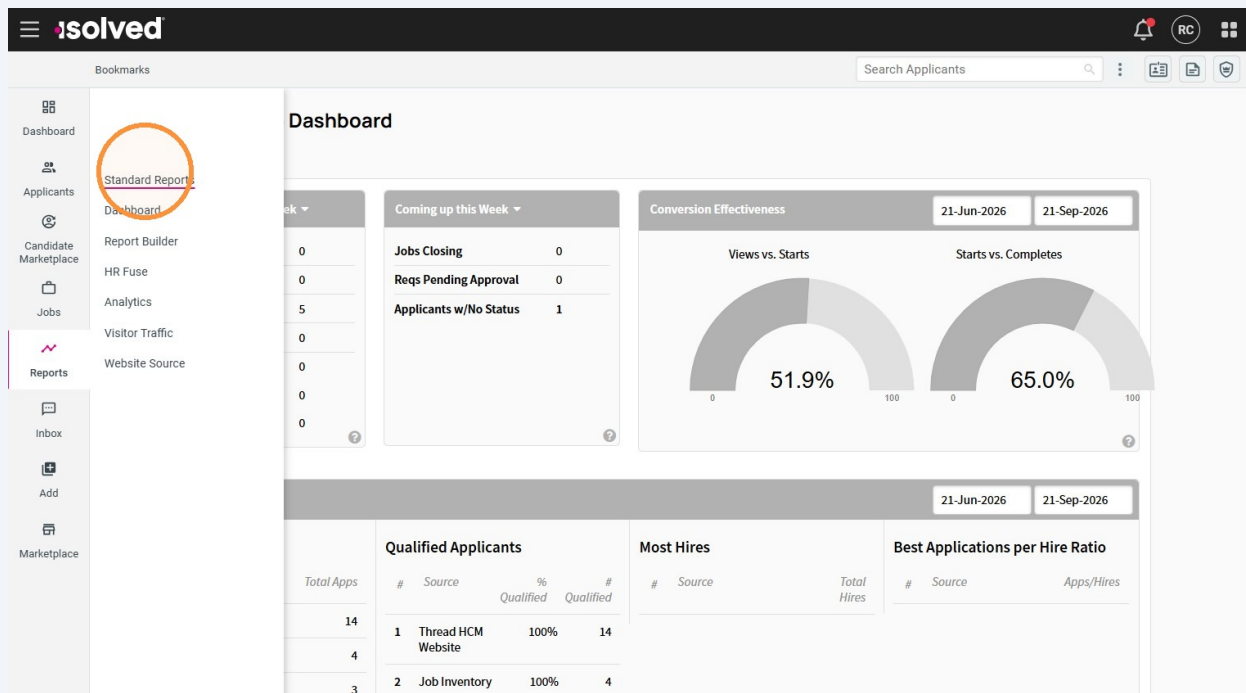


Report Navigation

2 Click Reports



3 Click Standard Reports



4

Here you can view a number of existing reports by scrolling down or click the topic headers here.

The screenshot shows the Thread HCM Demo Reports interface. The 'Applicants' tab is highlighted with an orange circle. The page includes a sidebar with navigation options like Dashboard, Applicants, Candidate Marketplace, Jobs, Reports, Inbox, Add, and Marketplace. The main content area has a top navigation bar with links to Standard Reports, Dashboard, Report Builder, HR Fuse, Analytics, Visitor Traffic, and Website Source. Below this, there's a section for 'Administrative' reports, which includes a table of reports and a 'Feedback' button.

Title	Description	Manager Access
Q View Business Units Report	Report showing all business units	Enabled
Q View Employee Payout	This report shows you any outstanding payments you need to make for an employee referral and past payments.	Enabled
Q View Job Listing History	This report shows which users are making certain changes to Job Listings.	Enabled
Q View Referrals By Employee	This report shows you all employees for your company and how many applications they have generated by referrals.	Enabled
Q View User Activity Detail	Report of all the actions a user has performed on an application.	Enabled

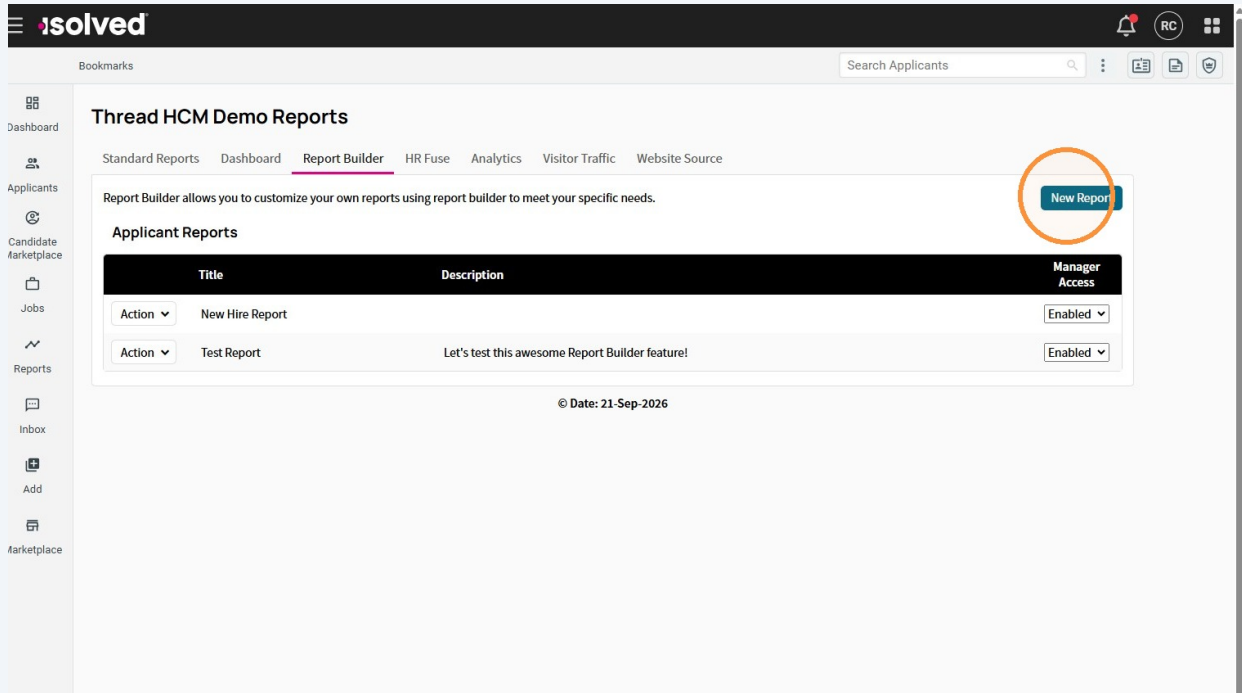
5

Otherwise you can click Report Builder to build your own report.

The screenshot shows the Thread HCM Demo Reports interface. The 'Report Builder' tab is highlighted with an orange circle. The page layout is identical to the previous screenshot, but the 'Report Builder' tab is selected in the top navigation bar. The 'Applicants' tab remains highlighted in the main content area.

Report Configuration

6 Click New Report

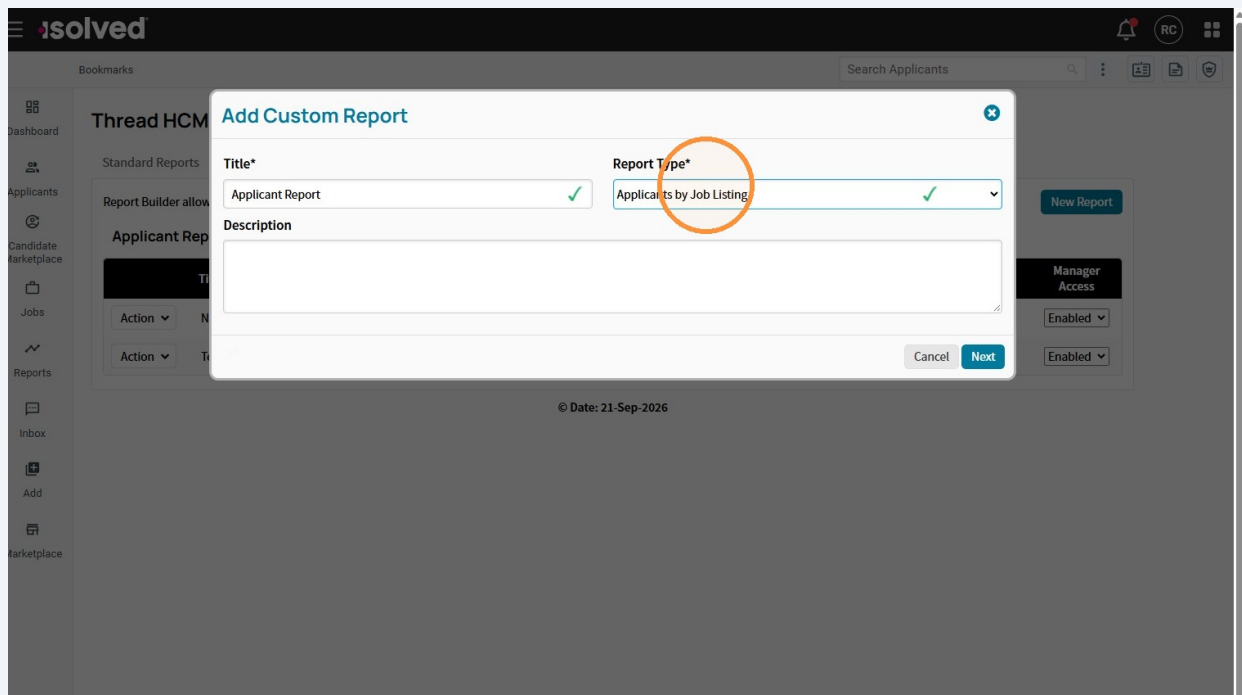


The screenshot shows the 'isolved' dashboard with the 'Report Builder' tab active. The main heading is 'Thread HCM Demo Reports'. Below it, a sub-heading says 'Report Builder allows you to customize your own reports using report builder to meet your specific needs.' To the right of this text, a 'New Report' button is circled in orange. Below the sub-heading is a table titled 'Applicant Reports'.

	Title	Description	Manager Access
Action ▼	New Hire Report		Enabled ▼
Action ▼	Test Report	Let's test this awesome Report Builder feature!	Enabled ▼

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7 Add your Title, Choose Report Type and Description



The screenshot shows the 'Add Custom Report' modal form. The 'Title*' field contains 'Applicant Report' with a green checkmark. The 'Report Type*' dropdown menu is circled in orange and shows 'Applicants by Job Listing' selected with a green checkmark. The 'Description' field is empty. At the bottom right of the modal are 'Cancel' and 'Next' buttons.

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Field Selection

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Then you can choose all your fields. Click the Field Categories and choose each Field.

The screenshot displays the 'isolved' application interface for creating a report. The left sidebar contains navigation links: Dashboard, Applicants, Candidate Marketplace, Jobs, Reports, Inbox, Add, and Marketplace. The main content area is titled 'Applicant Report' and includes a 'Description' text box. Below this, there are two columns: 'Available Fields' and 'Report Fields'. The 'Available Fields' column lists various categories with a search bar at the top. The 'Report Fields' column is currently empty. The right sidebar shows 'Manager Access' with two 'Enabled' toggle switches.

Title*
Applicant Report ✓

Report Type*
Applicants by Job Listing ✓

Description

Available Fields

- Search Available Fields...
- Application Data
- Candidate Information
- Agency Information
- Job Listings
- Employment
- Education
- References
- Department
- HR Data Surveys
- HR Data Survey Questions
- eForms
- eForm Questions
- Empty Fields
- Add an Empty Field

Report Fields

Manager Access

- Enabled
- Enabled

9 Add Job Listing ID

Description

Available Fields

Search Available Fields...

- Application Data
- Candidate Information
- Agency Information
- Job Listings
- Job Listing ID** + Add
- Job Template Name
- Created By
- Date Created
- Is Active?
- Job Listing Notes
- Internal ID
- Start Date
- End Date
- Job Listing Title
- Department
- Pay Rate
- Pay Type
- Pay Range Minimum
- Pay Range Maximum

Report Fields

- Application ID

Cancel Next

10 You can also search for fields. When you've chosen all your fields, click Save.

Description

Available Fields

candidate

- Candidate Information
- Candidate User ID
- Candidate Email
- Candidate Username
- Candidate Preferred First Name
- Candidate Preferred Last Name
- Candidate Address
- Candidate Address Cont.
- Candidate City
- Candidate State
- Candidate Zip
- Candidate Country
- Candidate Phone Number
- Candidate Phone Type
- Candidate Communication Preference
- Pay Rate
- Pay Type
- Pay Range Minimum
- Pay Range Maximum
- Benefits
- Job Country
- Job State

Report Fields

- Application ID
- Job Listing ID
- Job Listing Title
- Start Date
- Manager Name
- Candidate First Name
- Candidate Middle Name
- Candidate Last Name

Cancel Next

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Change any of the field titles here. Then Click Create Report

The screenshot displays the 'Thread HCM Demo Reports' interface. On the left, a sidebar lists navigation options: Dashboard, Applicants, Candidate marketplace, Jobs, Reports, Inbox, Add, and Marketplace. The main content area is titled 'Thread HCM Demo Reports' and includes tabs for 'Standard Reports', 'Dashboard', and 'Report Builder'. Under 'Report Builder', there's a section for 'Applicant Reports' with a table showing 'New Hire Report' and 'Test Report'. A modal window titled 'Edit Report Fields' is open, allowing customization of report fields. The modal contains the following fields:

Field Label	Field Value
Application ID*	Application ID
Job Listing ID*	Job Listing ID
Job Listing Title*	Job Listing Title
Start Date*	Start Date
Manager Name*	Manager Name
Candidate First Name*	Candidate First Name
Candidate Middle Name*	Candidate Middle Name
Candidate Last Name*	Candidate Last Name

At the bottom of the modal, there are three buttons: 'Cancel', '< Go Back', and 'Create Report'. The 'Create Report' button is highlighted with an orange circle. The background interface shows a 'New Report' button and a 'Manager Access' section with 'Enabled' dropdowns.

At the bottom of the page, there is a search bar with the text 'Need help? Search the Help Content' and a link to 'Common Report Builder Questions'.