

Reporting Options

Jenny Kongkalai - 2023-06-04 - Manage Content

[Reporting Options in Holocentric Connect](#)

In the Holocentric Connect, you can generate reports from items views or from within an item. You can use the **Download** button to display the reporting options available.

Download Processes

Create document from: Selected items (3) Filtered items (14)
 All published (10)

Document content: Processes, All Steps, ordered alphabetically ▼

File format: Document (pdf) ▼

Page size: A4 (portrait orientation) ▼

Cancel Download

Holocentric Connect offers several reporting options for the different item types in the model.

[Selected items](#)

A group of items you have manually selected by holding down the Ctrl key + clicking on the item

Operations Search

Browse Process Streams **Processes** Work Instructions Systems

Complete list of all processes available to your organisation Delete **Download** Open Add New Process

Process name	Category	Relevant to	Last edited	Next review	Status
<input type="text" value="filter list to text entered here"/>	<input type="text" value="filter list to text entered here"/>	<input type="text" value="filter list to text entered h..."/>	No filter applied	No filter...	Published + unpublished
Add and connect decision point	Training	all people	30 Nov 2021 05:22 PM		Published
Create a new process	Training	all people	09 Dec 2021 10:32 AM		Published
External Position Fulfillment	Recruitment & HR Systems	all people	25 May 2023 03:29 PM		Published v2
Hire new position	no group	People and Culture Officer	29 May 2023 05:17 PM		Published v2
ICT hardware procurement	no group	all people	19 May 2023 10:21 AM		Draft v1
Internal Position Fulfillment	Recruitment & HR Systems	Business Unit Director, Busin...	29 May 2023 05:57 PM		Published v3
Onboard New Position	Recruitment & HR Systems	Business Unit Director, Busin...	29 May 2023 05:58 PM		Published v2
Onboard New Volunteer	Recruitment & HR Systems	Business Unit Manager, Busi...	29 May 2023 05:59 PM		Published v2
Populate process content	Training	all people	18 Nov 2021 11:01 AM		Published
Position Evaluation	Recruitment & HR Systems	All Staff, Business Unit Direct...	01 Jun 2023 02:14 PM		Draft v2
Position Evaluation	Recruitment & HR Systems	All Staff, Business Unit Direct...	25 May 2023 02:16 PM		Published v1
Position Fulfillment Preparation	Recruitment & HR Systems	All Staff, Business Unit Mana...	25 May 2023 02:25 PM		Published v1
Process Viewer Test Process	no group	all people	24 May 2023 11:26 AM		Draft v1
Raise procurement request	no group	all people	19 May 2023 10:34 AM		Draft v1

Filtered items

A list of items that are a result of filtering criteria

Operations Search

Browse Process Streams **Processes** Work Instructions Systems

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Process name	Category	Relevant to	Last edited	Next review	Status
<input type="text" value="filter list to text entered here"/>	<input type="text" value="filter list to text entered here"/>	<input type="text" value="Business Unit Director"/>	No filter applied	No filter...	Published + unpublished
Internal Position Fulfillment	Recruitment & HR Systems	Business Unit Director, Busin...	29 May 2023 05:57 PM		Published v3
Onboard New Position	Recruitment & HR Systems	Business Unit Director, Busin...	29 May 2023 05:58 PM		Published v2
Position Evaluation	Recruitment & HR Systems	All Staff, Business Unit Direct...	01 Jun 2023 02:14 PM		Draft v2
Position Evaluation	Recruitment & HR Systems	All Staff, Business Unit Direct...	25 May 2023 02:16 PM		Published v1

All published

All items that have a status of **Published**. You don't need to filter the view. The option to download only published item is available by default.

Operations Search

Browse Process Streams **Processes** Work Instructions Systems

Complete list of all processes available to your organisation Delete **Download** Open Add New Process

Process name	Category	Relevant to	Last edited	Next review	Status
<input type="text" value="filter list to text entered here"/>	<input type="text" value="filter list to text entered here"/>	<input type="text" value="filter list to text entered h..."/>	No filter applied	No filter...	Published
Add and connect decision point	Training	all people	30 Nov 2021 05:22 PM		Published
Create a new process	Training	all people	09 Dec 2021 10:32 AM		Published
External Position Fulfillment	Recruitment & HR Systems	all people	25 May 2023 03:29 PM		Published v2
Hire new position	no group	People and Culture Officer	29 May 2023 05:17 PM		Published v2
Internal Position Fulfillment	Recruitment & HR Systems	Business Unit Director, Busin...	29 May 2023 05:57 PM		Published v3
Onboard New Position	Recruitment & HR Systems	Business Unit Director, Busin...	29 May 2023 05:58 PM		Published v2
Onboard New Volunteer	Recruitment & HR Systems	Business Unit Manager, Busi...	29 May 2023 05:59 PM		Published v2
Populate process content	Training	all people	18 Nov 2021 11:01 AM		Published
Position Evaluation	Recruitment & HR Systems	All Staff, Business Unit Direct...	25 May 2023 02:16 PM		Published v1
Position Fulfillment Preparation	Recruitment & HR Systems	All Staff, Business Unit Mana...	25 May 2023 02:25 PM		Published v1

Individual item reporting

You can report on an open item by selecting the download button

Operations > Processes Search

External Position Fulfillment Start Editing

Step-by-step All Steps Map RASCI Relevant Policies Version

Start

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis ornare, mauris vitae commodo pretium, mi leo iaculis diam, non scelerisque erat elit ac

You will be presented with the reporting options for this item

Download Processes

Create document from: "External Position Fulfillment"

Document content: Processes, relationships and version information

File format: Spreadsheet (xlsx)

Page size: Not applicable

Cancel
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Report Content

The below table outlines the reporting options available and the report format:

Processes
Processes, All Steps, ordered alphabetically (PDF)
Processes, All Steps, ordered by category (PDF)
Processes, relationships, and version information (XLSX)
Work Instructions
Work Instructions, ordered alphabetically (PDF)
Work Instructions, ordered by category (PDF)
Work Instructions, with version information (XLSX)
Systems
Systems, with version information (XLSX)
Policies
Policies, ordered alphabetically (PDF)
Policies, ordered by category (PDF)
Policies, relationships, and version information (XLSX)
Regulation
Regulations, ordered alphabetically (PDF)
Regulations, ordered by category (PDF)
Regulations, relationships and version information (XLSX)
Controls
Controls, with all information (XLSX)
Risks
Risks, with all information (XLSX)
Documents

Documents, with version information (XLSX)

Persons

Persons, with version information (XLSX)

Roles

Roles, with version information (XLSX)

Positions

Positions, with version information (XLSX)

Users

User Details Summary (XLSX)

Knowledge Details User Summary (XLSX)

Required Reading User Summary (XLSX)