

Hiring Analytics Workbook - User Guide

For users entering requisition and candidate pipeline data in the sample workbook.

Purpose

This workbook tracks requisitions, candidates, interviews, funnel health, and dashboard metrics. The shared copy contains sample data only. Use it as a template or demonstration workbook, then replace sample rows with real entries only in the data-entry columns.

Workbook Tabs

Tab	What it is for	Edit guidance
Dashboard	Summary metrics, funnel, workload, alerts, and diagnostics.	Do not manually edit calculated metric cells.
Today's Interviews	Auto-generated view of interviews scheduled for today and the next two days.	Do not manually edit. It reads from Candidate Pipeline.
Requisitions	Master list of hiring roles, owners, priority, dates, status, and comments.	Enter/update requisition details in the input columns.
Candidate Pipeline	Candidate-level tracker from sourcing through joining/outcome.	Main working sheet for recruiter updates.
Reference Data	Dropdown option lists and stage definitions.	Edit only if you intentionally want to change dropdown values.
Recommendations	Operating recommendations and usage notes.	Read-only guidance unless you want to customize the template.

Core Workflow

- Start by adding or updating roles in the Requisitions tab.

- Add candidates in Candidate Pipeline and choose the matching Req ID.
- Update each candidate stage as interviews progress: Screening, Round 1, Round 2, Round 3, Final Round, HR Round, Offer Status, and Joining Status.
- Use dropdowns wherever available. Avoid typing alternate spellings because dashboard formulas rely on exact values.
- Review Dashboard and Today's Interviews after data entry; these tabs update from the source sheets.

Where To Enter Data

Sheet	Enter data in	Avoid editing
Requisitions	Req ID, role title, department, positions, priority, location, experience, budget, dates, recruiter, manager, status, comments.	Calculated columns: Candidates Sourced through Days Open.
Candidate Pipeline	Candidate info, source, contact, Req ID, applied date, recruiter, stage outcomes/dates, offer/joining status, notes.	Days in Current Stage and Feedback sheet columns are calculated.
Reference Data	Dropdown lists only when changing the template's allowed choices.	Stage-code definitions unless the process itself changes.

Dropdown Rules

Field	Allowed values
Requisitions - Priority	P0, P1, P2, P3
Requisitions - Location	Noida_sample, Lucknow_sample, Bengaluru_sample, Remote_sample
Requisitions - Recruiter	Recruiter_A_sample, Recruiter_B_sample

Requisitions - Status	Open, On Hold, Closed - Filled, Closed - Cancelled
Candidate Pipeline - Source	LinkedIn, Naukri, Indeed, Referral, Campus, Agency, Direct Application
Candidate Pipeline - Screening	Yet to begin, Select, Reject, Hold
Candidate Pipeline - Interview rounds	Select, Reject, Hold
Candidate Pipeline - Offer Status	Offered, Offer Drop, Hold
Candidate Pipeline - Joining Status	Joined, Backed out

Stage Update Logic

- Use Select when a candidate clears a stage and should move forward.
- Use Reject when the candidate does not clear the stage.
- Use Hold when the candidate or role is paused.
- Use Offered only in Offer Status, not in HR Round.
- Use Joined or Backed out only in Joining Status.
- Fill the matching date column for each completed stage. This keeps Today's Interviews and Days in Current Stage meaningful.

Formatting Legend

Visual cue	Meaning
Light blue cells	User-editable input fields.
Light green cells	Calculated/formula-driven fields.
Green text/fill	Positive or active status.

Red text/fill	Rejected, cancelled, backed out, or dropped status.
Amber text/fill	Hold or pending attention.

Do Not Edit

- Do not overwrite formulas in Dashboard, Today's Interviews, Requisitions calculated columns, Candidate Pipeline Days in Current Stage, or Feedback sheet.
- Do not delete sheets unless you also update all formulas and named ranges.
- Do not change dropdown spellings unless you update the related formulas and dashboard labels.
- Do not paste over entire rows with formatting from another workbook; paste values only when importing data.

Adding New Real Data Later

- Replace sample requisitions with real requisitions in Requisitions rows 5 onward.
- Replace sample candidates with real candidates in Candidate Pipeline rows 5 onward.
- Keep Req IDs consistent between both tabs.
- If adding new dropdown options, update Reference Data and the related dropdown ranges before entering those values.
- After bulk changes, scan Dashboard for unexpected zeroes or unusually high counts.

Troubleshooting

Symptom	Likely cause	Fix
Dashboard count looks wrong	Req ID mismatch or stage value typed outside dropdown list.	Check Req ID and use the dropdown value exactly.
Candidate not appearing in Today's Interviews	Interview date is blank or outside today's 3-day window.	Enter a valid date in the relevant round date column.

Dropdown missing	Cell formatting/validation was overwritten during paste.	Copy validation from a nearby row or restore from template.
Formula cell shows an error	Formula was overwritten or dependent source data was deleted.	Restore the formula from a clean template copy.
Cells look dark or unreadable	Legacy conditional formatting or external formatting was pasted in.	Use the formatting-fixed workbook and paste values only.

Annexure: Field Explainers

Use this annexure as the quick reference for what each field means, what to enter, and how dashboard sections should be read.

A. Requisitions Sheet

Field	What to enter / what it means
Req ID	Unique role code. Must match the Req ID used in Candidate Pipeline.
Role Title	Hiring role or job title.
Department	Function or team hiring for the role.
Positions	Number of openings for this requisition.
Priority	Hiring urgency: P0 highest, then P1, P2, P3.
Location	Work location or Remote option from dropdown.
Experience (Yrs)	Target years of experience needed.
Budget (LPA)	Approved salary budget or range benchmark.
Requisition Date	Date the hiring request was opened.
Target Close Date	Planned closure or hiring deadline.
Recruiter	Recruiter responsible for the role.
Hiring Manager	Manager or business owner for the role.
Feedback sheet	Optional link to interviewer feedback tracker.
Status	Open, On Hold, Closed - Filled, or Closed - Cancelled.
Candidates Sourced	Auto-count of candidates linked to this Req ID.
Candidates in Pipeline	Auto-count of active candidates across interview stages.

Awaiting Screening	Auto-count of candidates not yet screened.
Passed Screening, Awaiting R1	Auto-count cleared screening, waiting for Round 1.
Passed R1, Awaiting R2	Auto-count cleared Round 1, waiting for Round 2.
Passed R2, Awaiting R3	Auto-count cleared Round 2, waiting for Round 3.
Passed R3, Awaiting Final	Auto-count cleared Round 3, waiting for final round.
Passed Final, Awaiting HR	Auto-count cleared final round, waiting for HR round.
Offers Made	Auto-count of candidates reaching offer/joining stage.
Positions Filled	Auto-count of joined candidates for this role.
Fill Rate (%)	Positions filled divided by total positions.
Days Open	Auto-calculated open days, or Closed/Hold status.
Comments	Short notes: blockers, pipeline context, or next action.

B. Candidate Pipeline Sheet

Field	What to enter / what it means
S.No.	Running serial number for candidate rows.
Name	Candidate name. In sample files, names include _sample.
Profile	Candidate's current or target profile.
Tech Stack Expertise	Core skills, tools, or functional expertise.
Total Exp.	Total work experience.

Current Company & DOJ	Current employer and joining date, if known.
Current Location	Candidate's current city/location.
ROC	Reason for change or career move.
CCTC	Current compensation.
ECTC	Expected compensation.
Notice Period	Availability or notice period.
Offer (If any)	Mention competing offer or internal offer context.
Source	Candidate source selected from dropdown.
Contact Details	Phone or sample contact identifier.
Email	Candidate email address.
Candidate ID	Unique candidate identifier.
CV Link	Optional link to resume/CV.
Req ID	Requisition this candidate is mapped to.
Applied Date	Date candidate entered the pipeline.
Recruiter	Recruiter handling the candidate.
Days in Current Stage	Auto-calculated time since latest active stage date.
Screening	Initial screening result: Yet to begin, Select, Reject, Hold.
Screening Date	Date screening happened or is scheduled.
Round 1	Round 1 outcome: Select, Reject, or Hold.
Round 1 Date	Round 1 interview date.

Round 2	Round 2 outcome: Select, Reject, or Hold.
Round 2 Date	Round 2 interview date.
Round 3	Round 3 outcome: Select, Reject, or Hold.
Round 3 Date	Round 3 interview date.
Final Round	Final round outcome: Select, Reject, or Hold.
Final Round Date	Final round interview date.
HR Round	HR/offer discussion result: Select, Reject, or Hold.
HR Round Date	HR round or offer discussion date.
Offer Status	Offered, Offer Drop, or Hold.
Joining Status	Joined or Backed out after offer.
Outcome	Overall candidate state: Active, Joined, Rejected, On Hold, etc.
Feedback sheet	Auto-link to feedback sheet when available.
Additional Notes	Short free-text updates, risks, or follow-ups.

C. Today's Interviews Sheet

Field	How to read it
Date Range	Shows today through the next two days.
Interviews Scheduled	Count of matching upcoming interviews.
Candidate Name	Pulled from Candidate Pipeline.
Role	Candidate profile or role.

Tech Stack	Skill area from candidate data.
Experience	Candidate's total experience.
Round	Interview stage scheduled in the date window.
Interview Date	Scheduled date for that round.
Day	Today, Tomorrow, or weekday label.
Req ID	Mapped requisition.
Hiring Manager	Owner pulled from Requisitions.
Recruiter	Recruiter pulled from source data.
CV Link	Resume link if available.
Feedback Sheet	Feedback link if available.

D. Dashboard Page

Section / metric	How to read it
Top KPI cards	Quick view of total requisitions, open positions, filled positions, candidates, and average days open.
Awaiting Screening	Candidates waiting for first screening action.
Stale (>14 Days)	Active candidates stuck too long in one stage.
Avg Days in Pipeline	Average time active candidates have spent in current process.
Offers Pending	Offer-stage candidates needing follow-up.
Requisition Status	Open, closed, and cancelled requisition mix.
Hiring Funnel	Candidate progression from applied/sourced through hired.

Priority Distribution	Hiring load by urgency level.
Location Breakdown	Openings and requisitions by location.
Recruiter Workload	Requisitions, active pipeline, and hires by recruiter.
Source Effectiveness	Candidate volume and conversion by source.
Bottleneck Alerts	Operational alerts needing recruiter or manager action.
Quick Diagnostics	Health checks against benchmarks such as offer acceptance or pipeline ratio.
Outcome Distribution	Final or current candidate outcomes.
Department Breakdown	Hiring activity and open positions by department.

E. Practical Data Entry Tips

Rule	Why it matters
Use dropdown values exactly.	Dashboard formulas depend on consistent labels.
Keep Req ID consistent across sheets.	This links candidates to requisitions.
Enter dates in date columns only.	Interview views and days-open calculations depend on dates.
Do not overwrite green calculated fields.	They contain formulas used by dashboards.
Paste values only during imports.	Full-row paste can overwrite dropdowns or formatting.
Use comments/notes	Short notes keep the dashboard and tracker readable.

briefly.	
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