EmployeeConnect

Work. Flow. Smarter.

Recruitment

A manual designed to guide you on how to utilize the EmployeeConnect Recruitment module.

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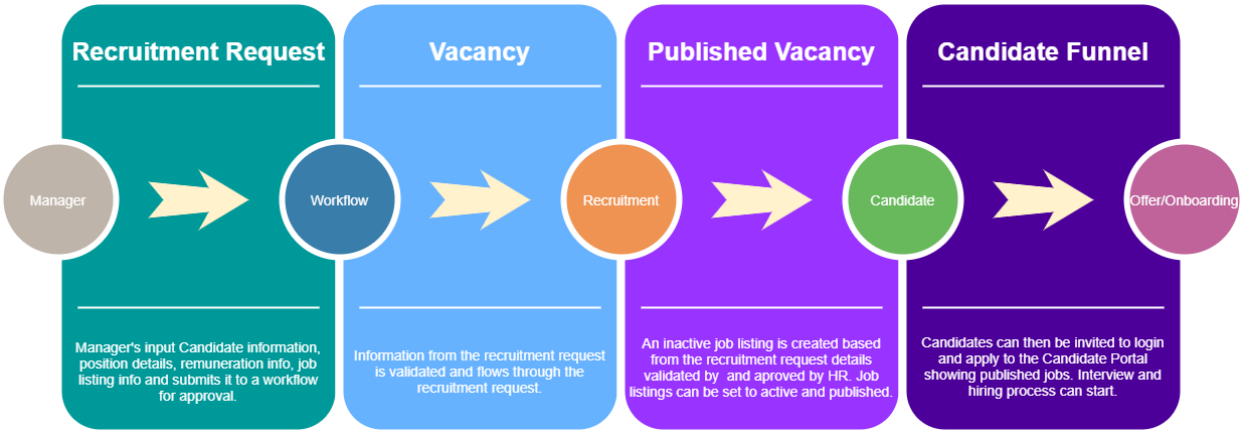
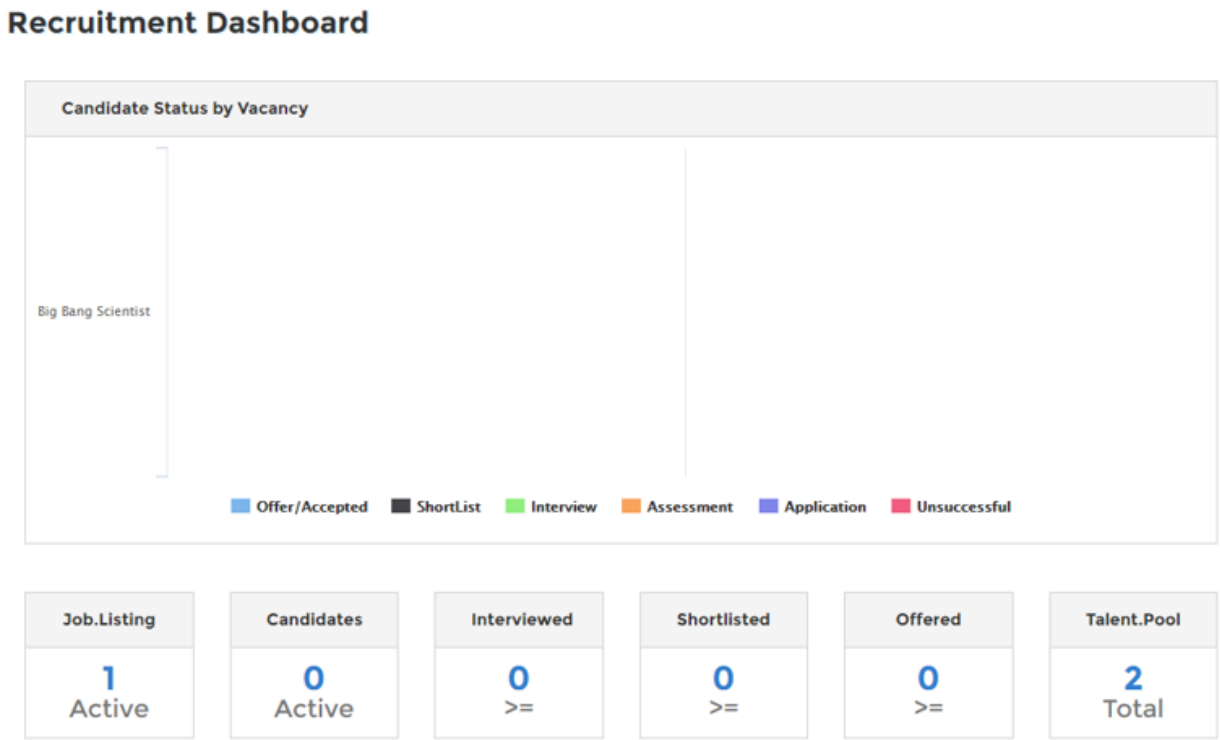
Introduction

This manual is designed to help you get familiar with the features and functions in the Recruitment Module. The guide will define all available components and their function, but it is still recommended that you discuss your business requirements and expectations with our EmployeeConnect consultants to determine the best configuration for your organization.

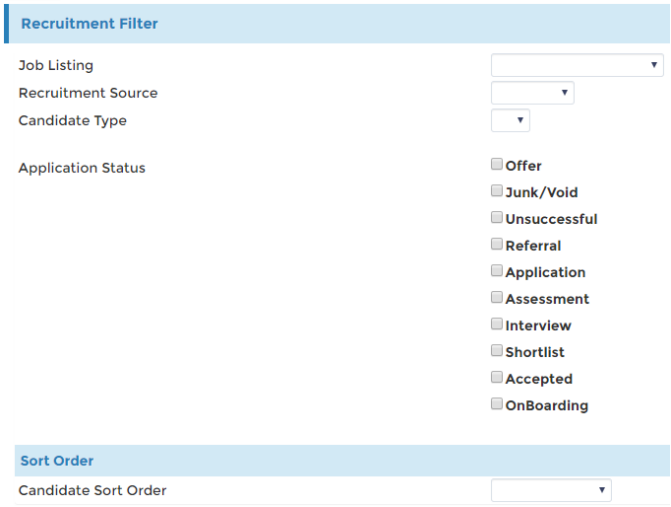
The Recruitment module is accessed from HR > Recruitment. The Recruitment dashboard is initially displayed when you access the Recruitment Module. This dashboard gives you an overview of your Job Listings/Vacancies, Candidates, Applications etc. Administrators and System Administrators can access this module.





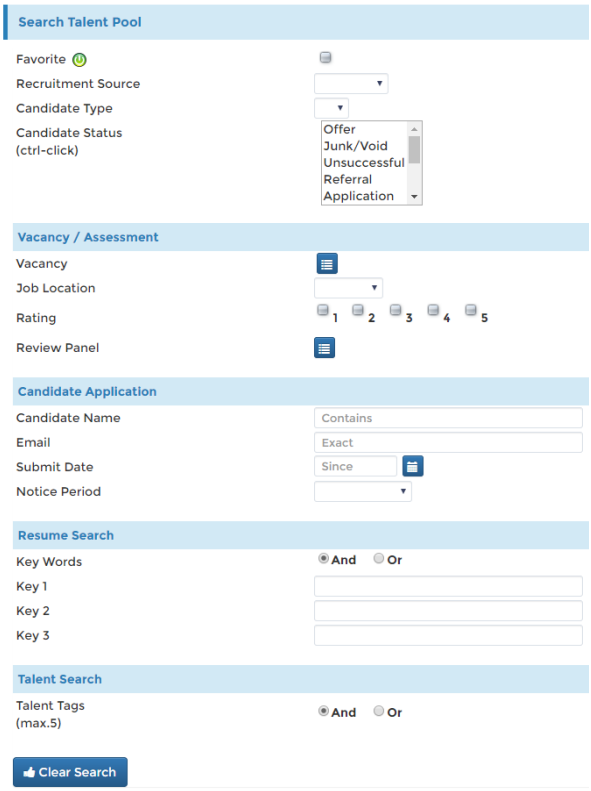
Recruitment Filter

The Recruitment Filter allows you to narrow down the data being displayed on the recruitment module. The filter you set here will apply across the different pages like Vacancy, Candidate funnel, Lifecycle etc.



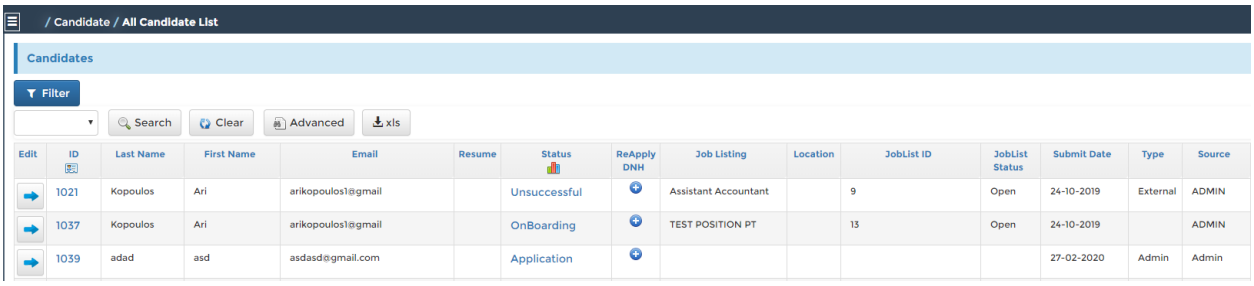
Search Talent Pool

Search Talent Pool opens a form where you can set specific parameters, allowing you to do a more detailed search. Hitting save after defining your search parameters will bring up a screen with matching data. This is very helpful when you are managing a lot of records and want to quickly pull people from that list.



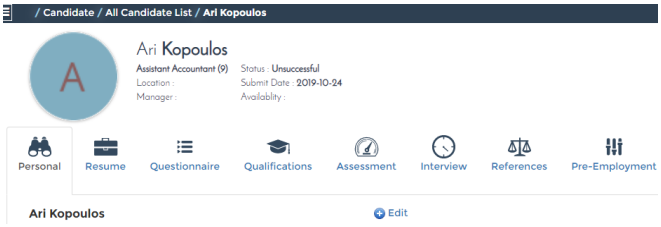
All Candidate List

All Candidate List is a report that will show the list of Candidate records in EmployeeConnect. This is the same report seen when you navigate to Lifecycle > All Candidate List.



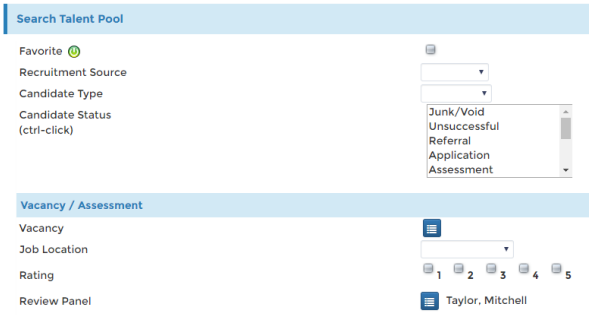
Edit	ID	Last Name	First Name	Email	Resume	Status	ReApply DNH	Job Listing	Location	JobList ID	JobList Status	Submit Date	Type	Source
	1021	Kopoulos	Ari	arikopoulos1@gmail		Unsuccessful		Assistant Accountant		9	Open	24-10-2019	External	ADMIN
	1037	Kopoulos	Ari	arikopoulos1@gmail		OnBoarding		TEST POSITION PT		13	Open	24-10-2019		ADMIN
	1039	adad	asd	asdasd@gmail.com		Application						27-02-2020	Admin	Admin

ID column/ card this opens the candidate record card showing their information in different tabs like Personal, Resume Interview details etc.



Search Talent Pool

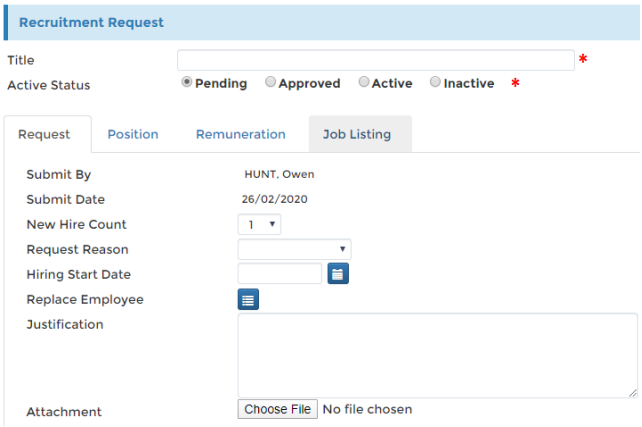
Search Talent Pool allows you to set more specific criteria for your search. This will pull up candidates from your talent pool, very helpful when you want to find people and know exactly what criteria the person falls under.



Recruitment Request

New Request

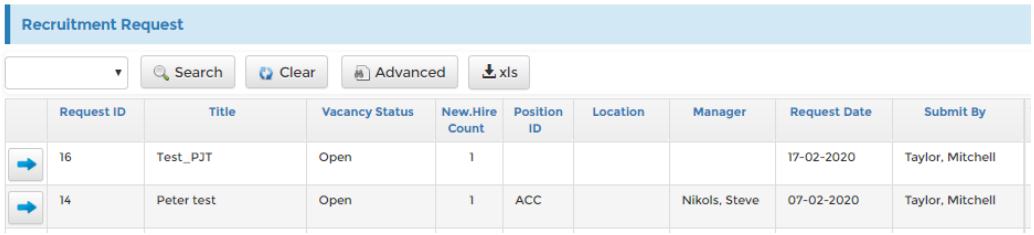
Create a new recruitment request for a vacancy here. This does not trigger a workflow and allows you to select what status the recruitment request will appear with after you create it. HR is responsible for this link and the creation of the recruitment request from this menu.
New recruitment requests, note the Active Status, will appear on the corresponding Job list section under vacancy – Active Job List, Inactive Job List.



Position tab gives you fields to input data related to the position you are posting this vacancy to. Details what Position the candidate will be in when he is applying for this vacancy, Manager name company etc. and other employment details can be input here. This info are not necessary but are helpful as the data you input here carries over to the Job listing which then carries over to the Offer – Employment tab. That said you can choose to leave the tab empty and populate the info later or have it done here and get EC to carry it over the other forms.

Request Pending/Approved

View Pending and Approved Recruitment Requests here. This is a report you can use to see recruitment request info like who submitted the requests, its vacancy status, how many applications are associated to the request, who the Manager for that listing will be, request date, location the request is for etc. Also note the recruitment request from submitted by the Manager from the Manager menu does flow to this report as well.



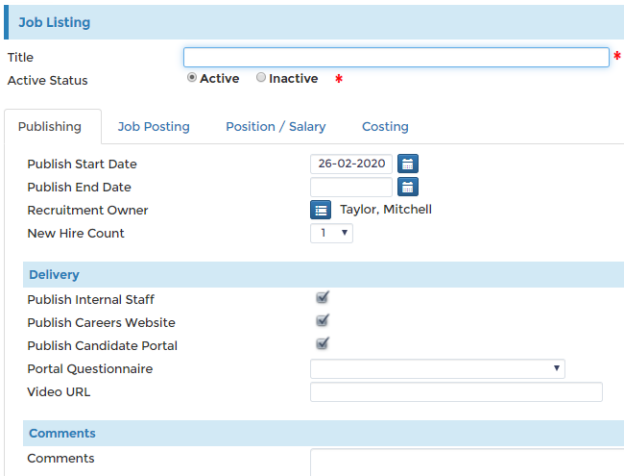
Here is a quick comparison of the Active Status radio group from the request vs Vacancy status column seen on the report.

New Recruitment Request Active Status	Recruitment Request Report
Active	Open
Inactive	Closed
Pending	Pending
Approved	Approved

Vacancy

New Job Listing

Create a new Job listing from here. Use this link to open a Job listing form and create a job/vacancy when you do not process recruitment requests and need to create the posting immediately. This will be dependent on your process.



How to publish a Job listing

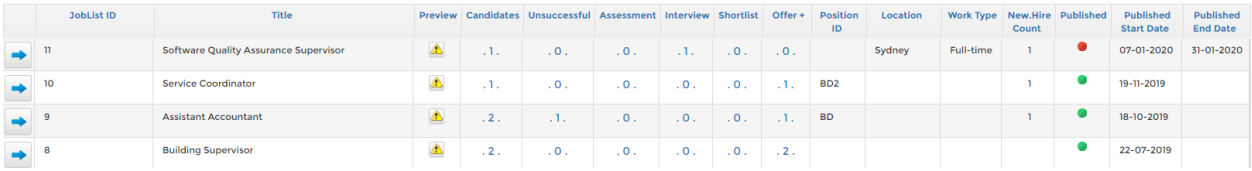
How to publish a job listing to Internal Career Opportunities/Careers Website/Candidate Portal page

1. Go to Recruitment > Vacancy
2. Click New Job Listing
3. Input all required fields in the form
4. Tick one or all of the following
    a. Publish Internal Staff tick box
    b. Publish Careers Website tick box
    c. Publish Candidate Portal Staff tick box
5. Click Save

You may now view the published Job Listings from the Job Board Posting section.

Active Job List

The Active Job List report displays lots of helpful information about your active job lists. This report gives you a bird's eye view of you listings showing the number of candidates who applied for this position, who among those are unsuccessful, who is under assessment and other helpful detail. See the screenshot of the Active job list report below.



	JobList ID	Title	Preview	Candidates	Unsuccessful	Assessment	Interview	Shortlist	Offer +	Position ID	Location	Work Type	New.Hire Count	Published	Published Start Date	Published End Date
	11	Software Quality Assurance Supervisor		.1.	.0.	.0.	.1.	.0.	.0.		Sydney	Full-time	1		07-01-2020	31-01-2020
	10	Service Coordinator		.1.	.0.	.0.	.0.	.0.	.1.	BD2			1		19-11-2019	
	9	Assistant Accountant		.2.	.1.	.0.	.0.	.0.	.1.	BD			1		18-10-2019	
	8	Building Supervisor		.2.	.0.	.0.	.0.	.0.	.2.						22-07-2019	

The links under the status columns are clickable and will redirect you to other forms in the recruitment module. Candidates for example will redirect you to the linked Candidate status form (found from Recruitment > Lifecycle Application Status) filtered by the Job list it falls under.

Inactive Job List

The Inactive job list is a report to view when you want to see which job listings are inactive or pin the pending status. This is where you can find the job listing if you bring it down and set it to inactive.

	JobList ID	Title	Preview	Candidates	Position ID	Location	Work Type	New.Hire Count	Published Start Date	Published End Date
	18	Test2 from Manager		. 0 .				1		

You may click on the link within the table cells to open the related forms in the recruitment module and see the data similar to the active job list.

Job Board Posting

Internal Opportunities

View any of the Internal Careers posted Job listings here. This link is the same report seen from the Home page where an employee can apply for a job. The report shows the Post date, Location the job posting is for and other details.

Career Opportunities

Search Clear Advanced xls

View	Position	Post Date	Location	Hiring Manager	Work Type	ID
	Consultant	06-03-2020				19

Candidate Portal

Click Candidate Portal to view job listings published to your candidate portal. You can also publish new changes done to the candidate portal listings by clicking the Publish button to get those changes to the candidate portal at once.

Candidate Portal Joblisting

Publish Last Update : 19-11-2019

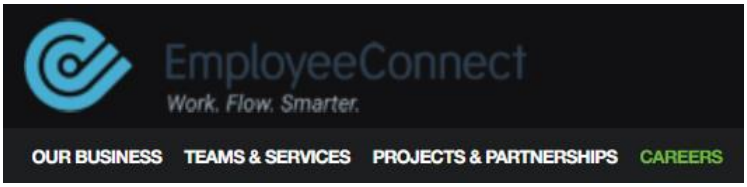
Search Clear Advanced xls

View	Position	Post Date	Location	Hiring Manager	Work Type	ID	
	Assistant Accountant	18-10-2019				9	https://demo.datakiosk.com/GUEST/loginex.aspx?Usernar
	ShutDown Coordinator	08-05-2019	Aukland	Perrin , Christina	Part-time	5	https://demo.datakiosk.com/GUEST/loginex.aspx?Usernar

The Candidate Portal is where guest's login to apply. This is different from your EC website, guest have very limited access here, mostly to view and apply for job listings or register their information.

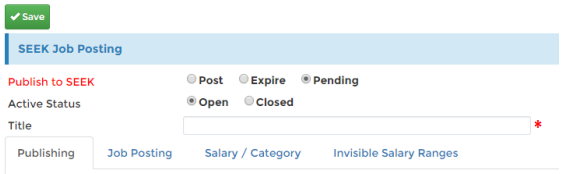
Careers Website

See and manager the job listings you published to your Careers website from here. Like the previous item on the manual, you can make changes and publish these changes immediately by clicking the publish now button. Your job listings will be seen when they navigate to the site and head to the careers page. This is an external site but the configuration/integration settings can be found in the recruitment module.



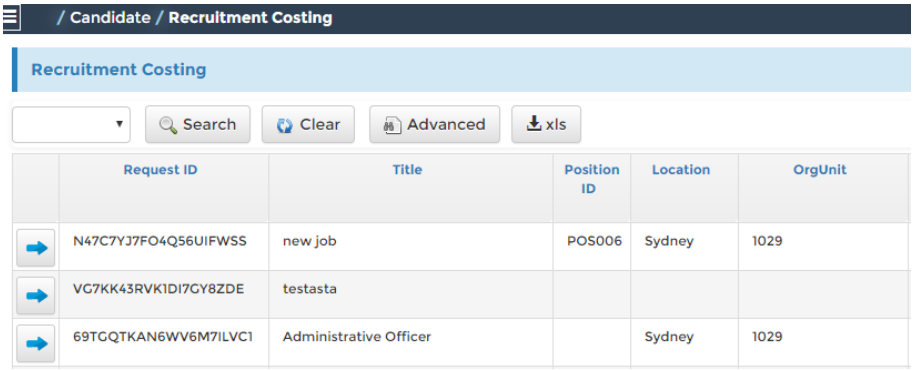
SEEK Job Posting

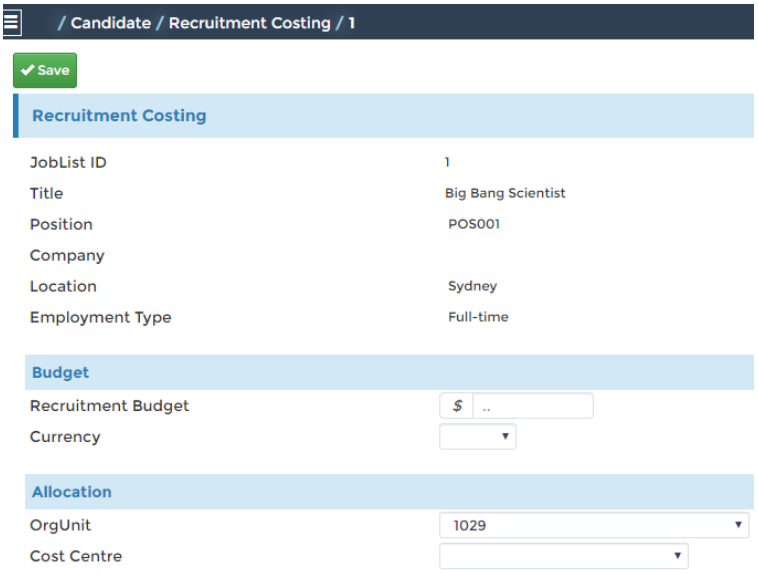
View and manage all your SEEK Job Listings from here, create a new SEEK Posting from this list by clicking the new SEEK Posting link. Publish to SEEK, there are 3 options to select from when creating the SEEK Job posting. Post – will publish the Job listing, Expire will expire the listing from SEEK while Pending will have the listing seen but not published yet.



Recruitment Costing

Track your Recruitment Request cost numbers from this report. The requests created will appear on this list and you have the option to edit the details.

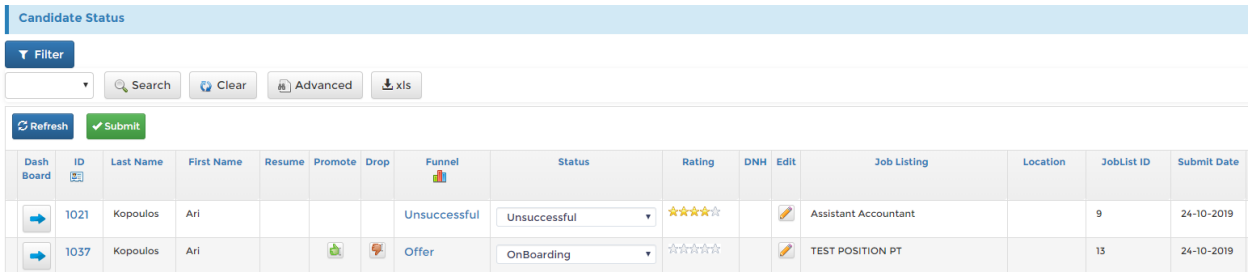




Candidate Funnel

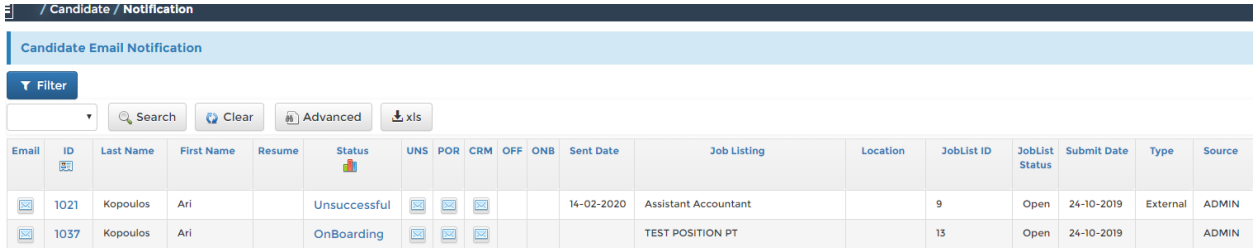
Application Status

View the list of Candidates with their associated status from this report. You can click on each candidate from the report and bring up a detail view of their information. You may also move their application status from one to another from this report from the Status column. Promote from one status to the next using the thumbs up button from the promote column or drop to unsuccessful by clicking the thumbs down button.



Notification

Send different notices to your candidates from this menu. Plenty of options found here, you can send an email to the candidate via the email button under the Email column, this can be anything from a reminder email or an email to clarify something regarding his application. You can click on the Unsuccessful email button from the UNS column to send a notice to an unsuccessful candidate. Same for when you want to send an email to invite them to the Candidate portal and Crimtrac, just click on the envelope button under the POR or CRM column.



Candidate Funnel Status

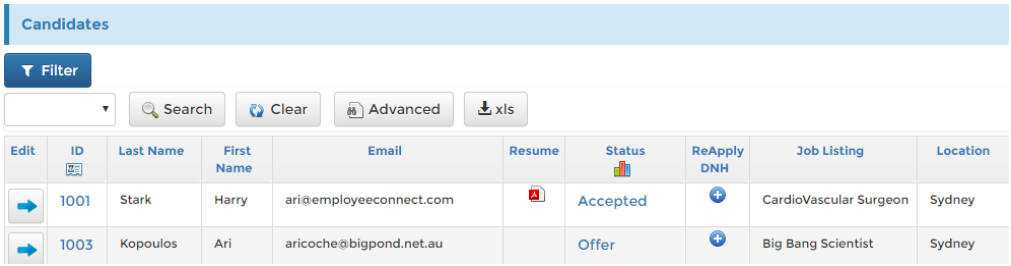
These reports narrow down all the candidates in their respective categories. Makes it easier for you to check where the candidates are if you are positive to what their status is within the candidate funnel.

- Unsuccessful – all candidates are found in this report except for those who already have been given offers. You can use this report to see a list of candidates and drop them to the unsuccessful category. You can tick the update and send tick box and click the green check mark to send the unsuccessful email notice to the candidate.
- Assessment - all candidates you set with the assessment status can be found here. You can drop them one status down or promote them one status up using the appropriate buttons from on the promote or drop column.
- Interview - all candidates set with the interview status can be found here. You can click on the add new button to setup new interview details.
- Shortlist - all shortlisted candidates can be found here; you can add referee details here by clicking the add new button.
- Offer – candidates with offers setup for them are found on this report. You can also see candidates who accepted their offers, have been given onboarding or logged on the onboarding site from this report.

Lifecycle

All Candidate List

The All Candidate List is a report you can use to view all the candidates in the kiosk. This will list everyone with any status. Use the filter to narrow down the information. You can edit the candidate details from here by clicking the Edit button.



Internal Referrals

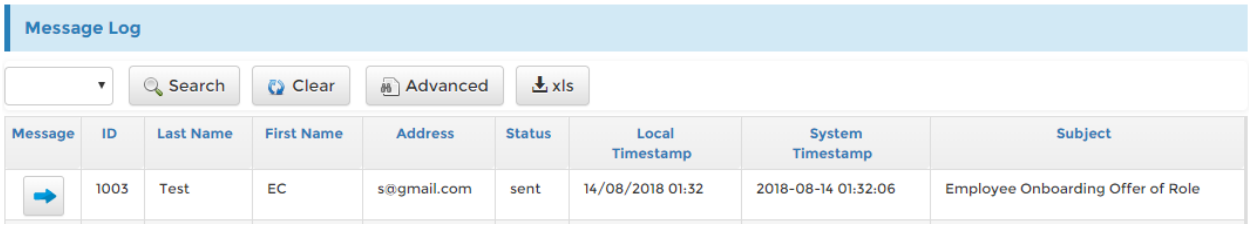
This report displays all internal referrals submitted from the internal referral link from the recruitment module.

Interview Calendar

Quickly view interviews mapped in the calendar, very helpful when you want to see what's on the plate for the current timetable.

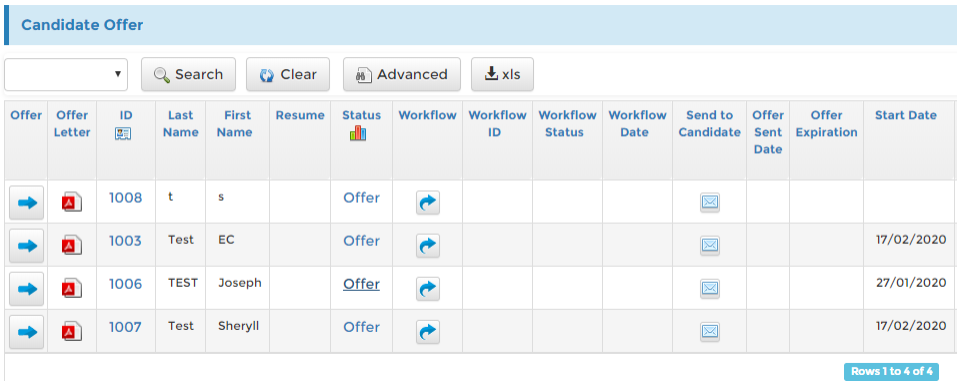
Message Log

Use the Message Log report to view emails sent from EC. This is very helpful to check if an email you are expecting to be sent out was indeed sent out by the platform.



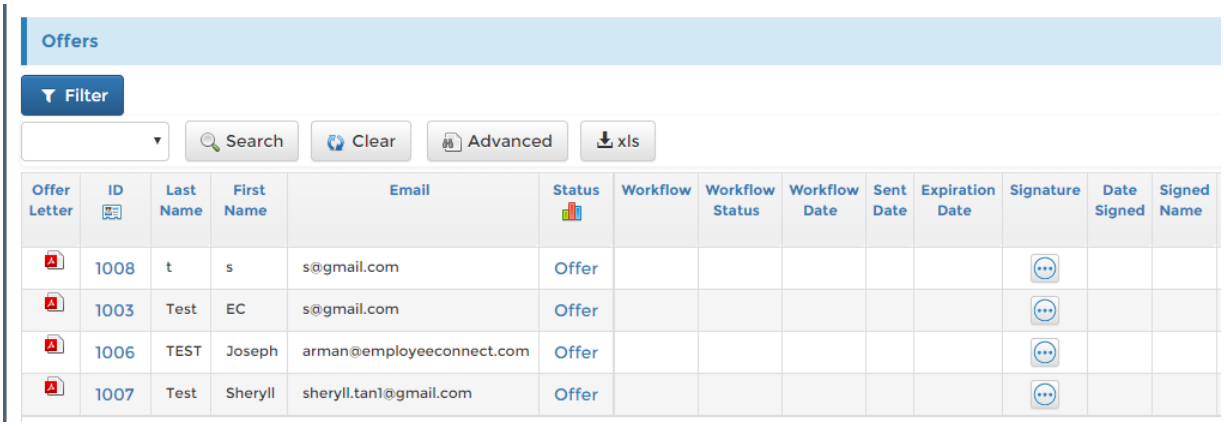
Offer Status

Click on this link to open the Offer Status report, you can view the list of candidates who have been generated an offer. You may edit the offer details here, send the offer either via workflow or manually b clicking on the envelope button under the Send to Candidate column.



Signed/Accepted Offers

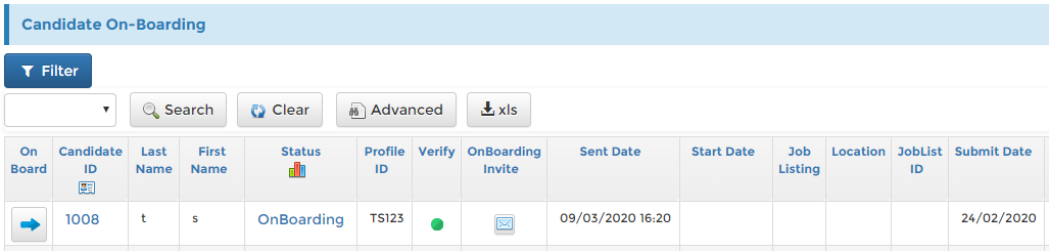
Click on this link to open the Signed/Accepted offers report displaying candidates who has signed and accepted the offers. The report lists the candidate offer and candidate info with a signature column. You can click on the ellipsis button to open up the contract/offer form view and see the signature of the candidate from his offer acceptance.



Offer Letter	ID	Last Name	First Name	Email	Status	Workflow	Workflow Status	Workflow Date	Sent Date	Expiration Date	Signature	Date Signed	Signed Name
	1008	t	s	s@gmail.com	Offer								
	1003	Test	EC	s@gmail.com	Offer								
	1006	TEST	Joseph	arman@employeeconnect.com	Offer								
	1007	Test	Sheryll	sheryll.tan1@gmail.com	Offer								

Candidate on-Boarding

Click on this link to open the Candidate On-Boarding report. You can setup the candidate on-boarding details from this report by clicking on the arrow button under the on-board column. Note: It is imperative to setup the work email for this to work, without it the onboard invite will not trigger – use a personal email if the candidate does not have a Company email at the time you are sending the invitation. Once done, you can then proceed to send the onboarding invite by clicking on the envelope button to open the form.



On Board	Candidate ID	Last Name	First Name	Status	Profile ID	Verify	OnBoarding Invite	Sent Date	Start Date	Job Listing	Location	JobList ID	Submit Date
	1008	t	s	OnBoarding	TS123			09/03/2020 16:20					24/02/2020

How to On-Board a Candidate

We need create an offer for the candidate before we can on-board a candidate. Follow the steps below after you have created an offer and want to proceed with on-boarding the candidate.

1. Click Candidate On-Boarding
2. Click the Arrow button under the On board column to open the Candidate On-boarding form.
3. Input the Person ID – This can be left blank to allow the system to generate it
4. Click Save
5. Input the Login UserName – this will be used to logon to EmployeeConnect
6. Input the Login Password – this will be randomly generated and be sent to his work email
7. 2 Factor-Authentication – Select the method to send the authentication code, either email or mobile
8. Tick Login Enabled to make sure the Candidate can login after the settings are saved
9. Login Access – select a date from the calendar picker, this will be when he can log on to the website
10. Security Group – Select Employee, Manager or Admin depending on what security access you like to assign the candidate
11. Configuration – Set to On boarding to make sure the candidate goes through the on boarding site, set to Cirrus/Enterprise to have them logon to EmployeeConnect immediately.
12. Work Email – Very important, make sure to add their work email here as all email communications will go to this address. Assign his personal email if the user has no work email at the time the on boarding is being processed. Without this email address, the candidate won't be able to receive his invitation
13. Click the Personal tab to enter his personal information like Birthdate, Address etc.
14. Click the Employment tab to enter his employment information e.g. Employment agreement details
15. Click Remuneration to enter their Salary information

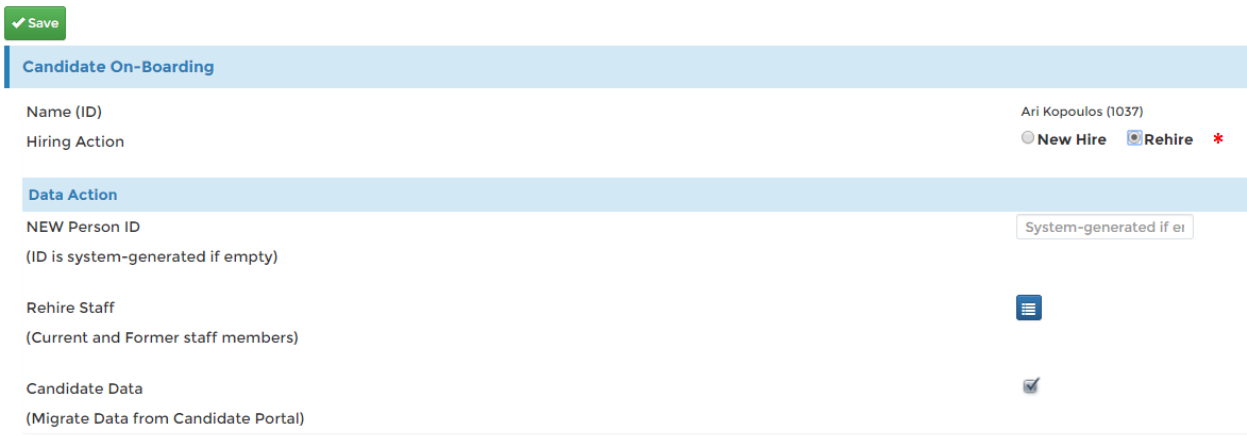
16. Click Provisioning to setup the allocation of company property to the employee
17. Click Tasks to assign the user induction checklist and tasks that will appear on his on boarding
18. Click Save

You can then proceed to send the onboarding invitation to the candidate by clicking the envelop button found on the same Candidate On-Boarding page.

How to re-hire in EmployeeConnect

The Rehire feature allows you to use an existing employee ID. This is usually done when an employee has left, has records on EmployeeConnect and got rehired. Doing so will allow you to use his existing data eliminating the need to input everything back again. Historical data will be kept in EmployeeConnect and you always have the option to change and update his record.

1. Click Candidate On-Boarding
2. Click the Arrow button under the On board column to open the Candidate On-boarding form.



3. Click the Rehire radio button
4. Click the  Rehire staff button to open the picklist
5. Select the staff from the list

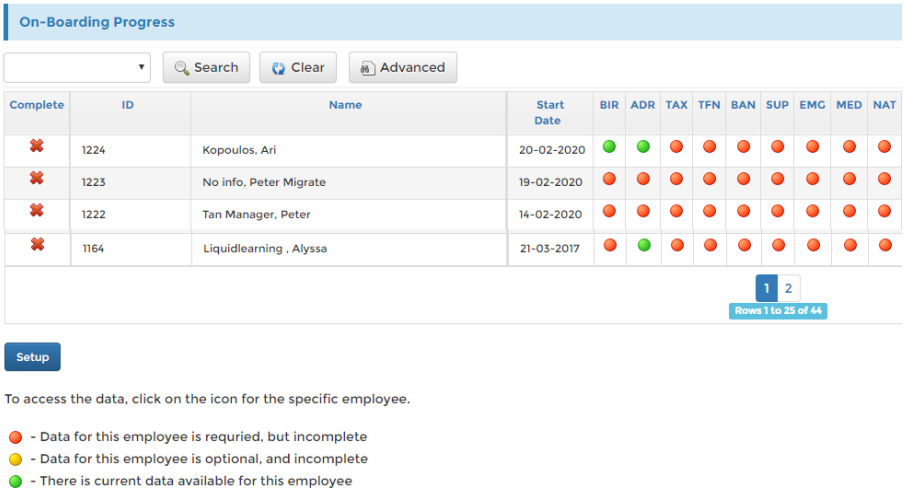
   Important: It is valuable to be very careful when you pick the rehire staff from the list as doing so will pick his Person ID and assign it to this resource being onboarded. This will essentially overwrite his record.

6. Click Save

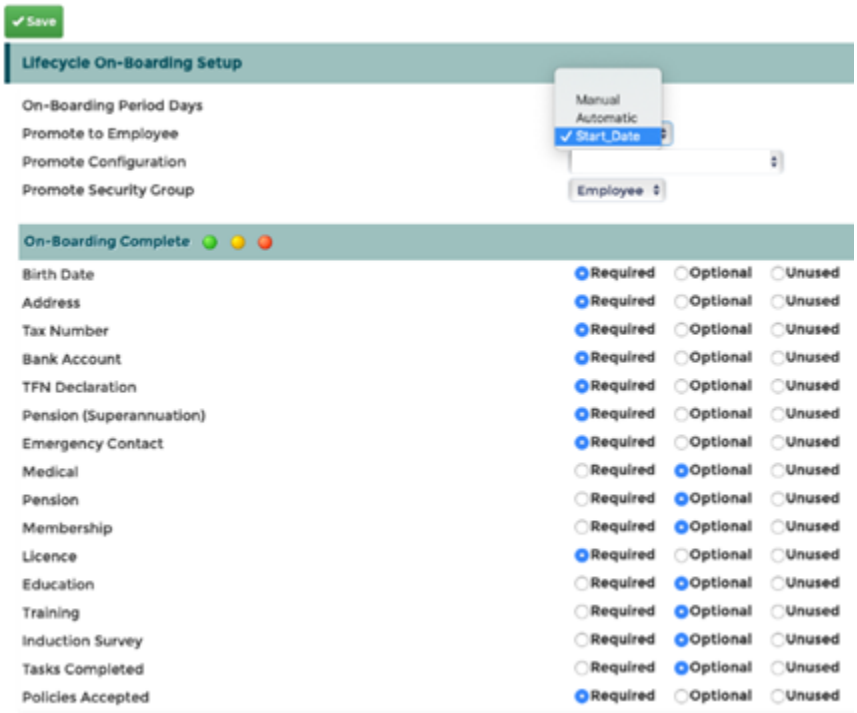
Lifecycle Onboarding Setup

Onboarding configuration is now made easier through the On-boarding setup page, you can define which field from the on boarding site are required or optional prior to promoting or migrating your new hires to their EmployeeConnect configuration. Follow the steps below on how to set this up.

Navigate to HR > LifeCycle > Onboard Progress and click the setup button found on the bottom of the form.



This is the LifeCycle On-Boarding Setup form



Promote to Employee Setting can be configured bellowed to specify when to migrate them to their respective EmployeeConnect Configuration.

Manual: Admin needs to manually change the config to employee
Automatic: System does it every hour when selected onboard required tasks are completed
Start Date: System does it when selected onboard required tasks are complete and start date is today

On-Boarding Period Days define how long the record appears on the report, leave this blank to make it infinite.

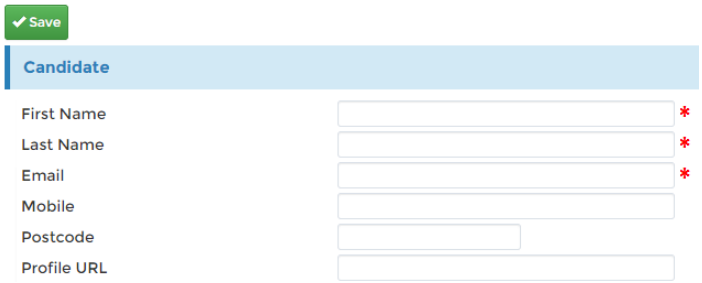
Promote Configuration defines what configuration they will be set to after they complete on-boarding, this should be equal to your Kiosks configuration e.g. Cirrus. Please make sure to talk to your EmployeeConnect consultant if you are unsure.

Promote Security Group defines the employees security group after they complete the on-boarding. They can be a System Admin, Employee or Manager.

Tick the **Required** radio button for any of the fields you wish to be a requirement for your new hires when they are going through the on-boarding site. This will require them to enter their information before they can be promoted or migrated from the onboarding site to the EmployeeConnect Kiosk when they login. Make sure to set the other fields to **Optional**. Marking the field as **Unused** will remove the field from the On-boarding Progress report only, this still shows up on the on-boarding site where they input their details.

Add Candidate

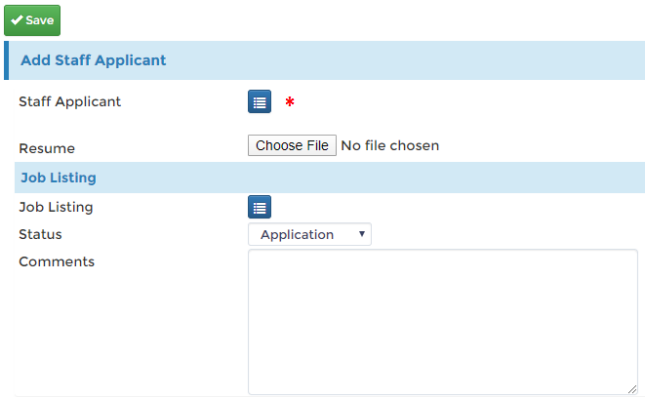
Click on the Add Candidate link to open the Add Candidate form. You can then enter the candidate details on this form to be able to get this candidate across the different functions of the recruitment module. Once done, you can completely manage the candidate information from EmployeeConnect.



You can set up the applicant for a job interview, assign an open/active Vacancy and invite the candidate to the candidate portal to fill in his personal information. Please note it is a requirement to have an associated job listing or vacancy before you can send the candidate a portal invite. Portal invitations can be sent from HR > Recruitment > Applicant Portal > Portal Invitation.

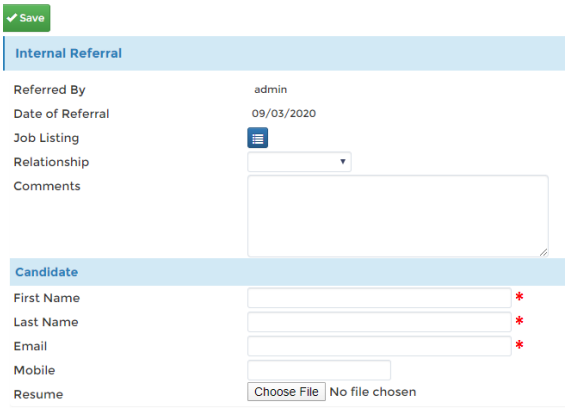
Staff Applicant

Click on the Staff Applicant link to open the form and input a staff applicant. This is useful when you have internal opening and would like to add an existing employee to the candidates you want to manage applications from. Once they are here, you can see them across the different parts of the Recruitment module.



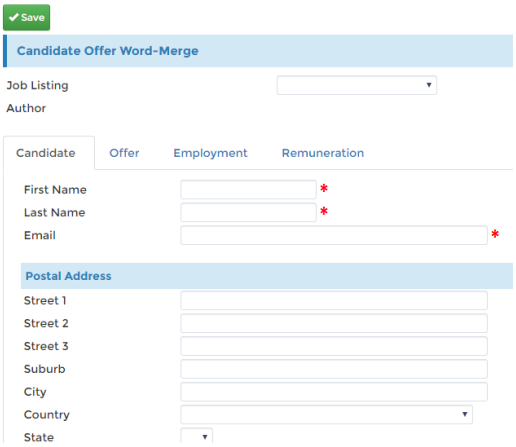
Internal Referral

Click on the Internal Referral link if you want to add an internal referral record. Very useful when you receive paper documents from referees who are referring internal staff.



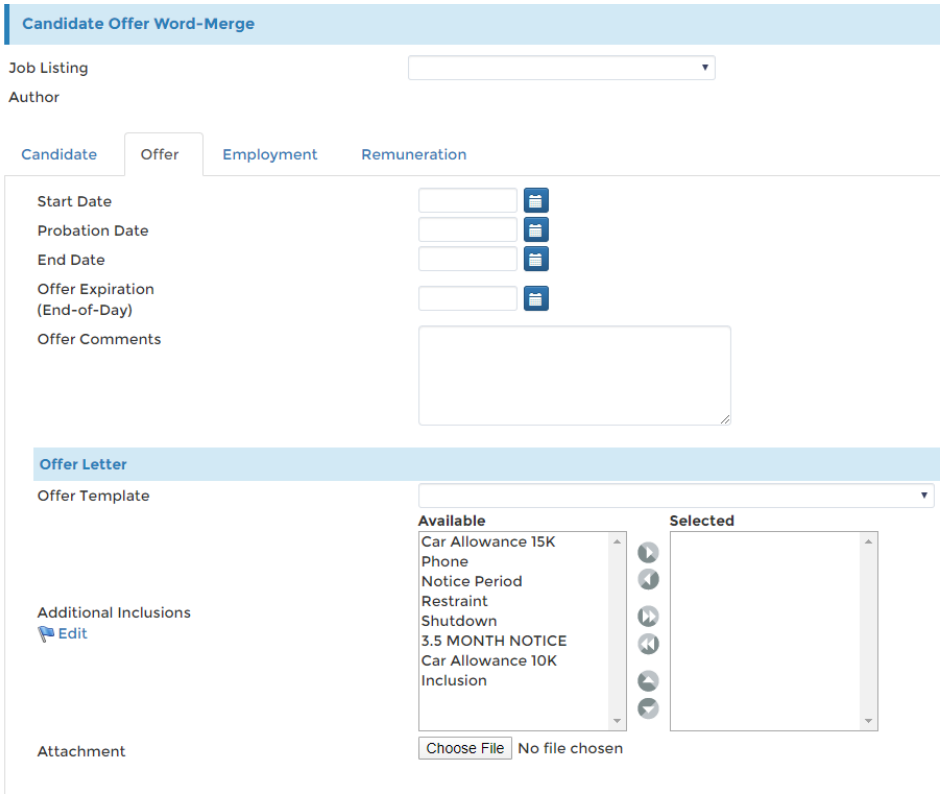
Quick Offer

Click on the Quick Offer link to create an offer for a candidate immediately.



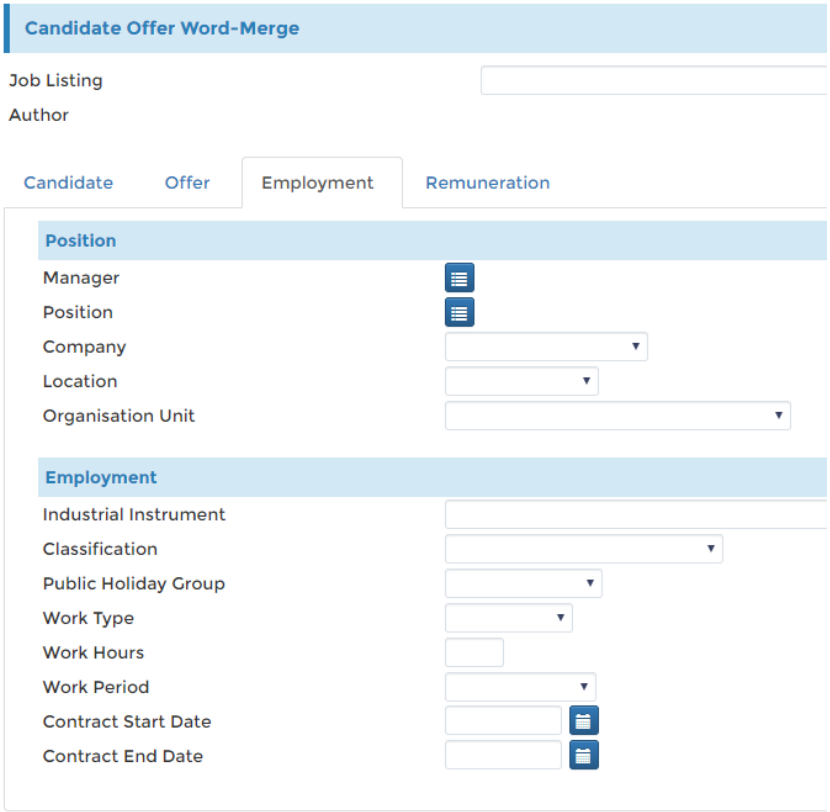
Candidate Tab

- First Name – candidate's first name
- Last Name – candidate's last name
- Email – candidate's email, this is where you will be sending the offer email
- Street 1 – street info
- Street 2 – additional street info
- Street 3 – additional street info
- City – city info
- Country – country info
- State – state info



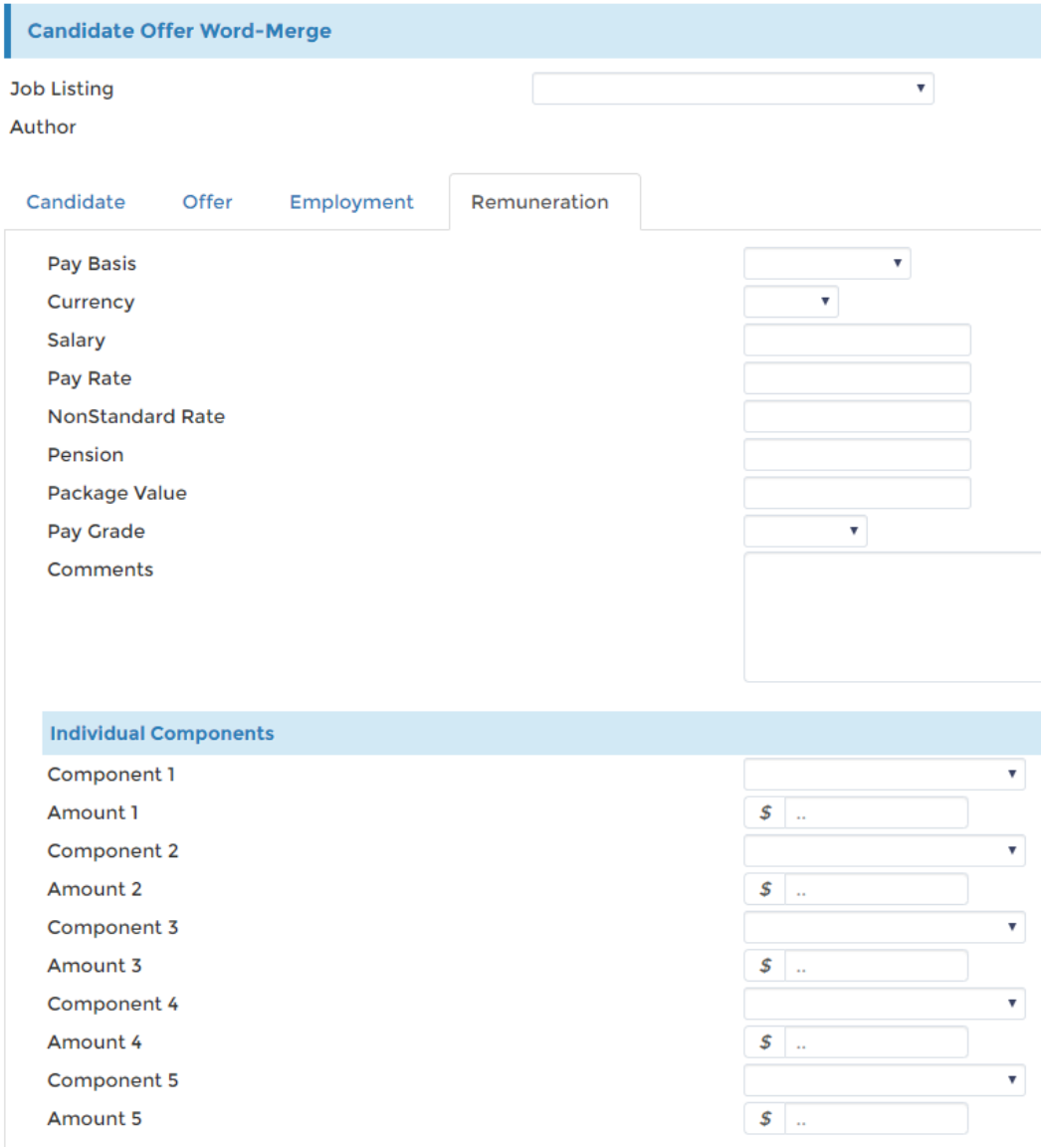
Offer Tab

- Start date – candidate employment start date
- Probation date – probation end date
- End date – employment end date
- Offer Expiration – expiry date of offer, window period where he can accept the offer
- Offer Comments – extra field to input your instructions or comments
- Offer Template – Offer letters appear here after setting them up from the setup section
- Additional Inclusions – additional inclusions that appear as sections in the offer
- Attachment – you can add attachments to the offer



Employment Tab

- Manager – relational data, can be used on the merge fields when creating an offer template
- Position – position being offered
- Company – company this falls under
- Location – relational data for offer
- Organisation Unit – relational data for offer, which org unit to relate this offer to
- Industrial Instrument – Type of employment, award for example
- Classification – which award type Working for children for example
- Public Holiday Group – which holiday group to associate to this offer
- WorkType – what worktype Casual, full time, part time
- Work Hours – work hours total work hours 7.5 for example for daily
- Work Period – work period, daily, monthly fortnightly etc
- Contract Start Date – start date
- Contract End date – end date



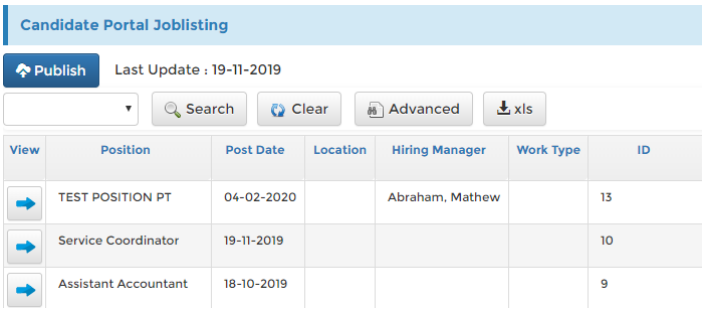
Remuneration Tab

- Pay Basis – Hourly, daily, monthly etc
- Currency – AUD, NZD etc
- Salary – Salary amount
- Pay Rate – Pay Rate amount
- NonStandard Rate – Non Standard Rate amount
- Pension - Superannuation
- Package Value – package value
- Pay Grade – Pay grade amount
- Comments – additional comments
- Component 1 – additional clauses not covered by the other fields
- Amount – amount for component above

Applicant Portal

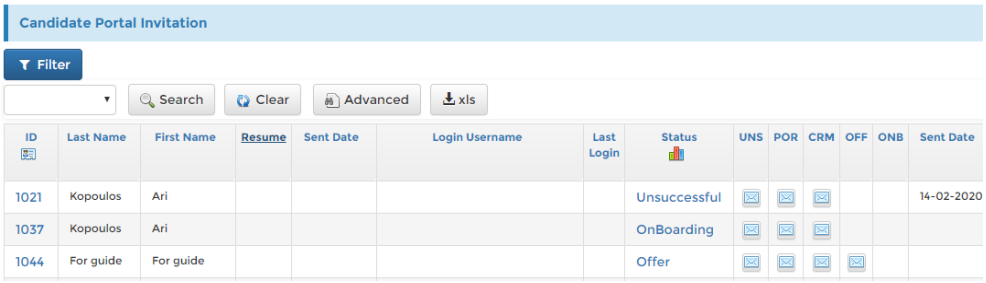
Job Listing

Click on the Job Listing link to open the Candidate Portal Job Listing. This report displays all the job listings you can publish to the candidate portal. There's a nightly update, but you can click on the publish button after you make any changes to the job listing to push the changes immediately.



Portal Invitation

Click on the Portal Invitation link to open the Candidate Portal Invitation page, you can see different options here like UNS, POR, CRM, OFF, ONB these are Unsuccessful, Portal invite, Crimtrac, Offer and Onboard respectively. You can click any, but we are interested in the Portal invite button POR. You can click on the envelope button under the POR column to send the email notice out to the candidate.



This is the Candidate Portal Invitation email. You can select to send the invitation via email or sms, click the radio button and customize the message, click the Save button to send the invitation as soon as you are done with your changes. A valid email address is essential to receive the portal invitation, also note that newly added candidates will need to have an associated Job listing or vacancy before they can be sent an invitation.

Candidate Notification : Portal

Candidate ID: 1053
Candidate Name: Peter John Tan
Email: Peter@employeeconnect.com
Mobile:
Comments:

Notification

Method: Email / Mobile
Subject: Invitation to Candidate Portal
Body: Hi [First_Name] [Last_Name], You are invited to login to the Candidate Portal and complete information regarding your registration/application. URL = https://www.DataKiosk.com Username = [Username] Password = [Password]
SMS Text:
Attachment: Choose File No file chosen
Substitution: First_Name, Last_Name, Native_Name, Vacancy_Name, Company_Name Manager_Name, Hiring_Manager_Name, Position_Name, Location_Name Start_Date, Probation_Date, Referee_Name, URL

Application Verification

Click on the Application Verification link to open the Application Verification report and view a list of candidates and their verification status. Verified or Green means they have opened and clicked the button sent to them via email therefore verifying their email is not a bogus or dummy email.

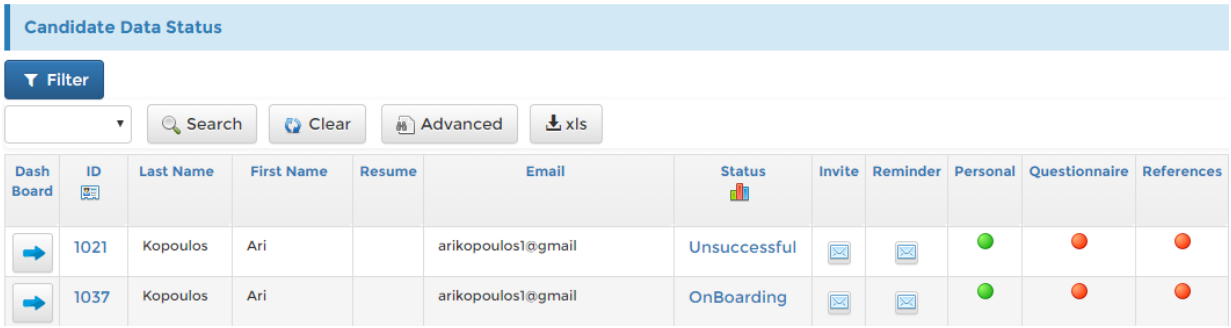
Candidate Application Verification

Filter | Search | Clear | Advanced | xls

ID	Last Name	First Name	Resume	Verified	Sent Date	Email	Last Login	Junk
1045	ggg	ggg				ggg@ec.com		
1043	MacDonald	Craig			01-03-2020	craig@employeeconnect.com		
1036	No info	Peter Migrate				p1@employeeconnect.com		

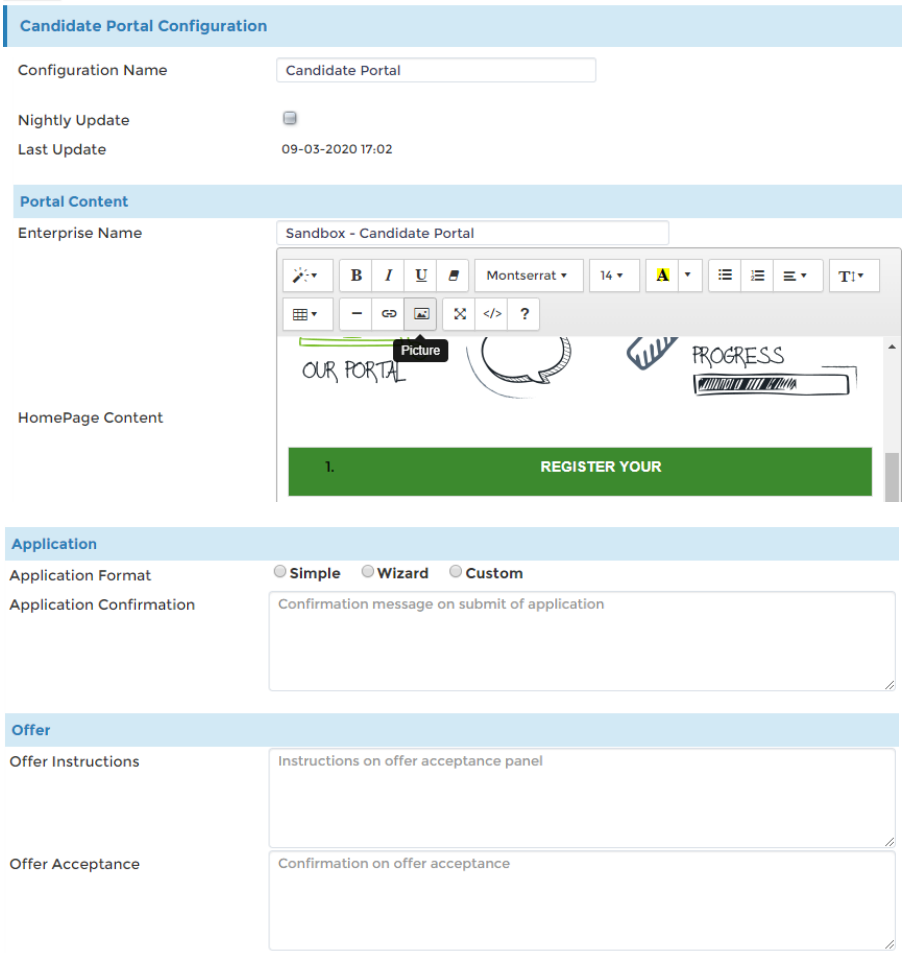
Data Status

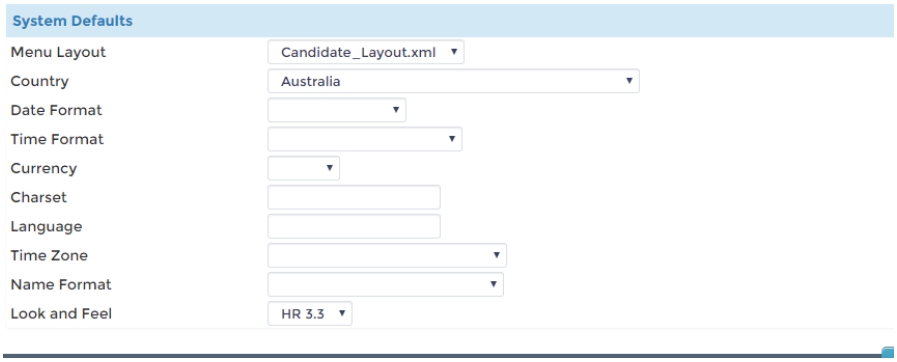
Click on the Data Status link to Candidate Data status page, this page lists the candidate recruitment information. Check this report to if you want to see the person's detailed Candidate Portal information. Be able to see if they have entered any data from the candidate portal. You may send Candidate Portal invitations from here and send a reminder for them to complete their Candidate Portal data if they have not completed it. Click on the envelope button under the column to do so.



Configuration

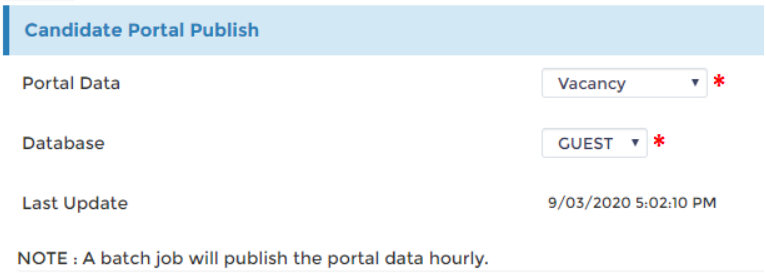
Click on the Configuration link to setup your Candidate Portal. Input your Candidate Portal name, Set the nightly update to run and select your Candidate portal contents from this page.





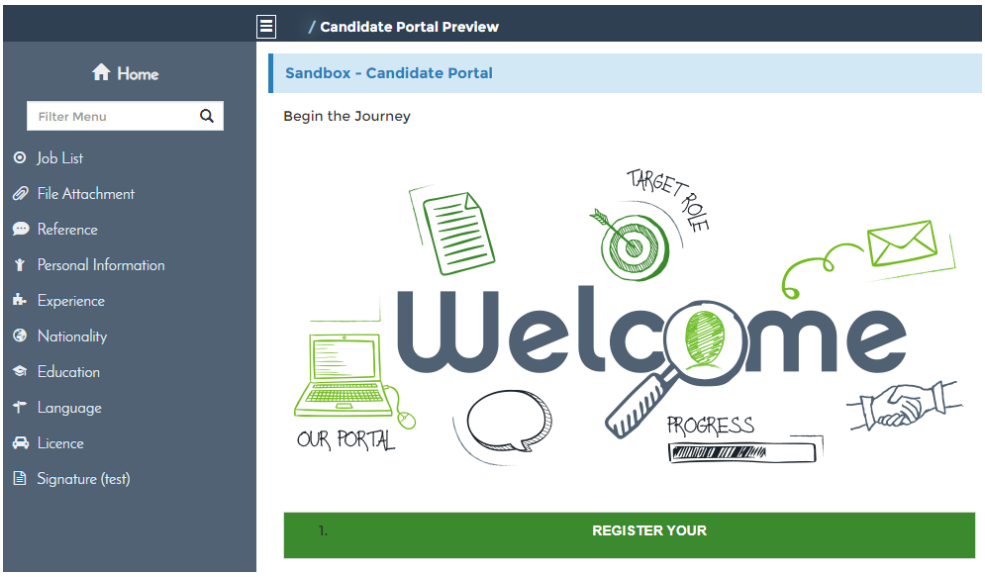
Publishing

Click on the Publishing link to select what Portal Data to publish. Very helpful if you wish to publish your changes immediately.



Candidate Portal Preview

Click on this link to view the Candidate Portal as if you are a guest checking the portal out yourself.



Agency

Recruitment Agencies

View, add or edit your agencies from here. There is also a button you can click to view the candidates associated or originated from the agency. This is a good report to get an idea where most of your candidates are generated from in terms of which Agency is getting them if they did originate from an agency.

Recruitment Agency

Search | Clear | Advanced | xls

Edit	Agency	Candidates	Service	Contact	Preferred Supplier	Active Record
	Agency for Scientists		Advertising Agency	Sheldon Cooper		
	Neurologists Agency		Advertising Agency	Derrick Shepherd		
	Cardio Surgeons		Advertising Agency	Christina Yang		
	Paediatric Surgeons		Advertising Agency	Tillie Potts		

Job listing Assignment

Access this report to setup your job listing assignments, you can split your job listings into the different agencies you have setup from the Agency setup page.

Recruitment Agency Assignment

Search | Clear | Advanced | xls

JobList ID	Title	Agency	Candidates	Location	Work Type
19	Consultant		. 0 .		
18	Test2 from Manager		. 0 .		
17	Trial recruitment Request		. 0 .		
16	Test_PJT		. 0 .		

Candidates by Agency

Candidate by agency is a report that displays the candidates that where sourced by agencies.

Candidates by Agency

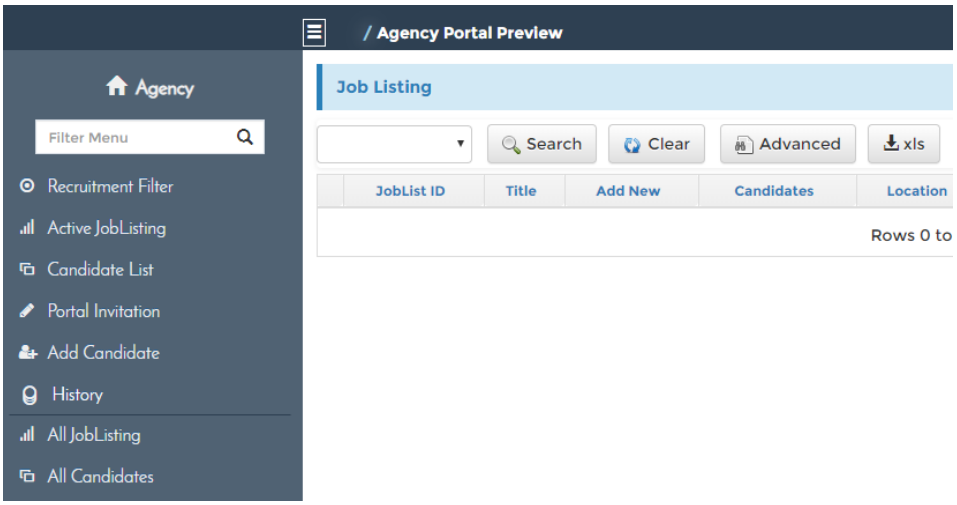
Filter

Search | Clear | Advanced | xls

Agency	Submit Date	Dash Board	ID	Last Name	First Name	Resume	Status	Job Listing	Location	JobList ID
	27-02-2020		1040	q	q		Application			
Agency for Scientists	22-07-2019		1007	Shoomera	Aaron		Offer	ShutDown Coordinator	Aukland	5
Neurologists Agency	13-07-2019		1006	Zoroast	Shamaa		Unsuccessful	ShutDown Coordinator	Aukland	5

Agency Portal Preview

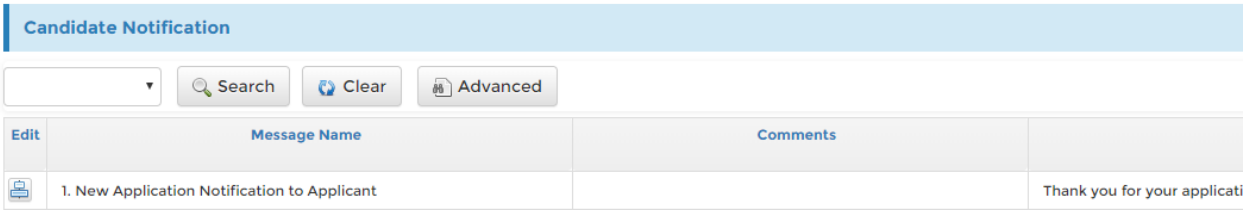
You can preview the Agency Portal like how you are able to preview the candidate portal. View the page as if you have logged on as the candidate to view the job listings etc.



Setup

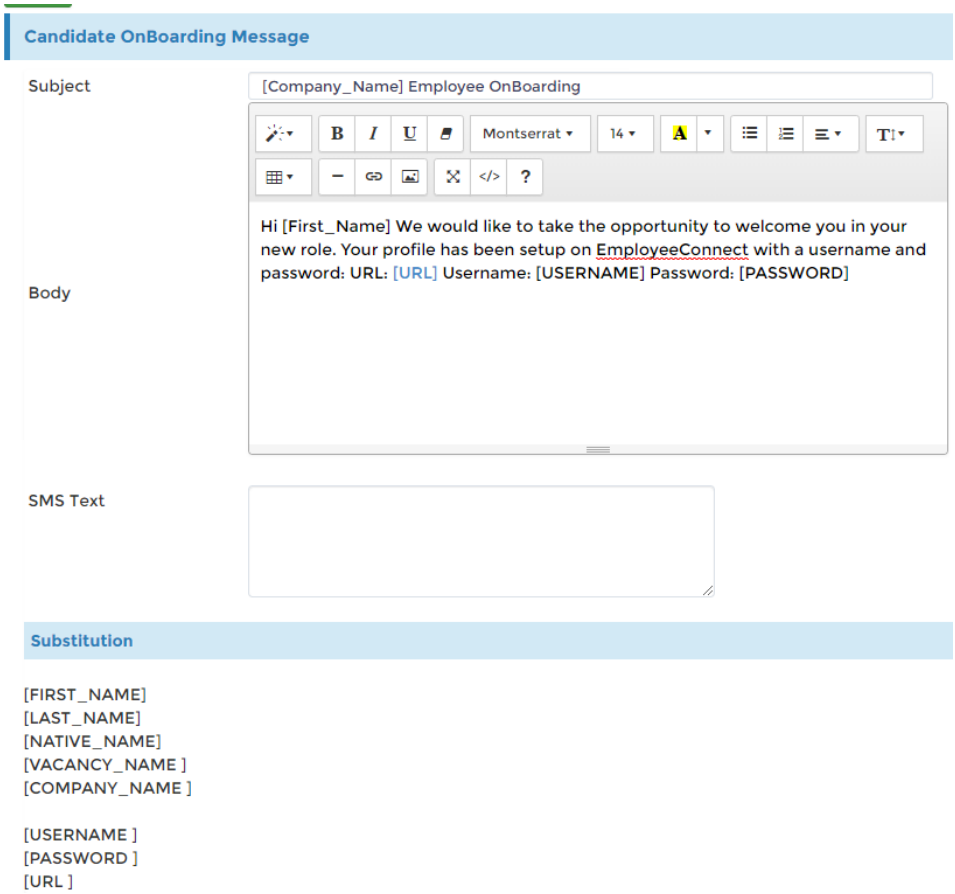
Email Template

Setup your email notices from here, notice the workflow button? These are mostly messages found from the workflow. You are only allowed to edit existing templates here, adding new ones will be scoped and involve customization, please contact your EmployeeConnect consultant if you require more.



How to edit Email Templates

1. Navigate to HR > Recruitment > Setup > Email Templates
2. Click Edit



This is a sample of the Onboarding invitation sent to candidate who accepted the offer and passed all the recruitment process.

- Subject – email subject
- Body – input your message here, use the substitution fields listed under the substitution section merge fields from the forms
- SMS text – input your message here when sending the notice as a text message

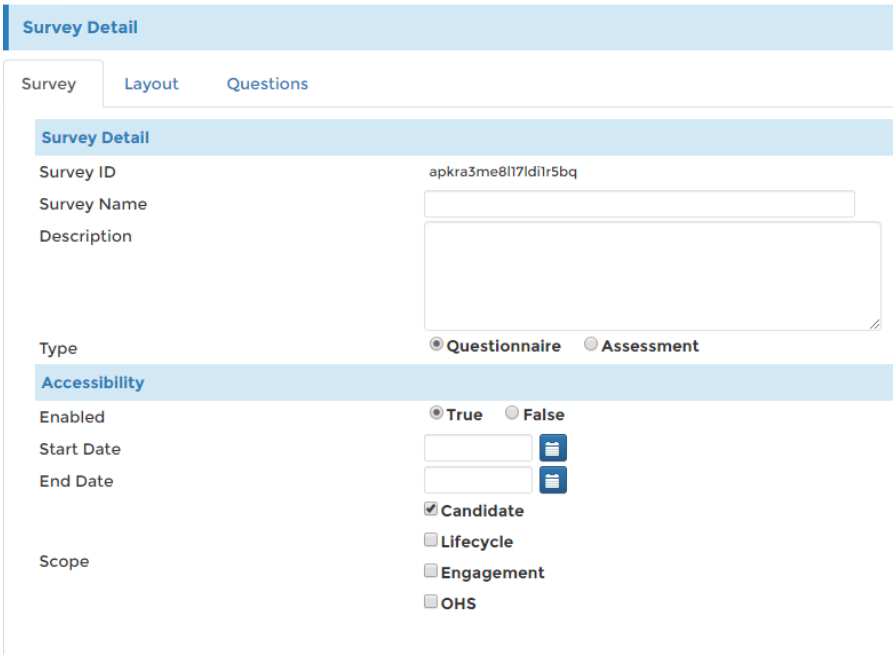
3. Click Save to save the changes and update the template.

Questionnaire

These are the Interview questions candidates can answer. Edit these or set up a new one for use.

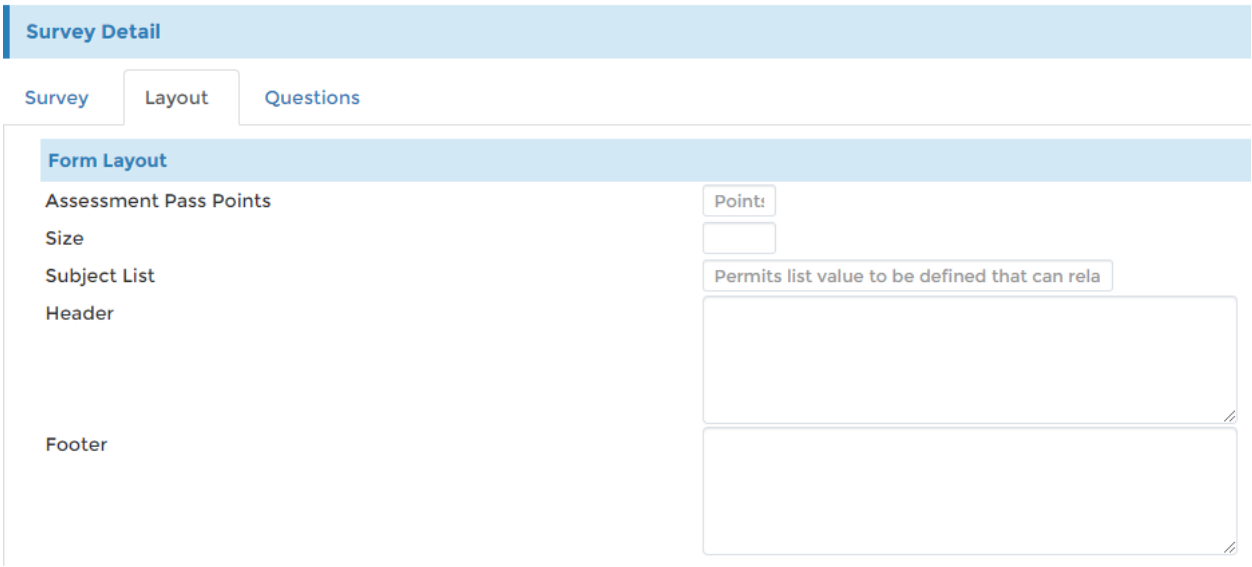
How to Create Questionnaires

1. Navigate to HR > Recruitment > Setup > Questionnaire
2. Click the Edit button to edit an existing questionnaire or click Add new to create a new one
3. Survey tab



- Survey Name – this will be the name of the questionnaire, this shows up on the picklist
- Description – comment about this questionnaire
- Type – questionnaire or assessment with scores
- Enabled – set to True to make it active, false will exclude this from appearing from the picklist and forms
- Start date – set a date here if you want to specify when to make this questionnaire available
- End date – specify the date to take the questionnaire down, leave blank to leave it indefinitely there
- Scope – Select the option where you want this to be available
    - Candidate – available to candidates you invite to login to the Candidate Portal
    - Lifecycle – available to core
    - Engagement – available as an Engagement survey
    - OHS – available from the Safety module

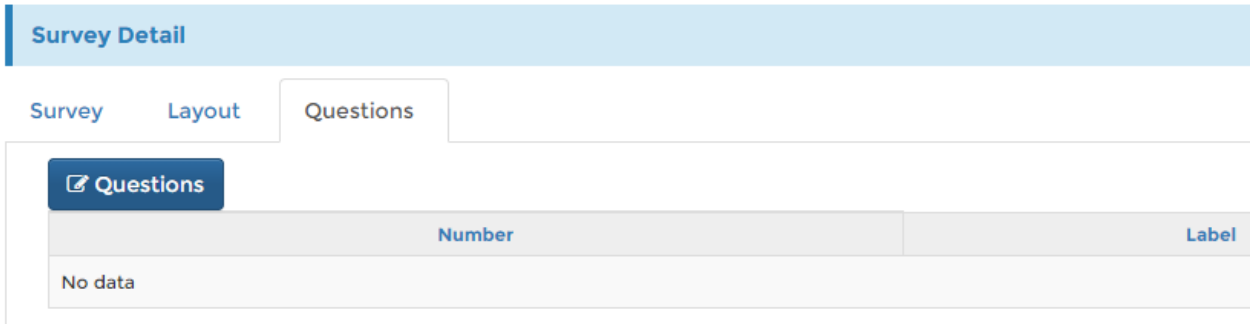
4. Layout Tab



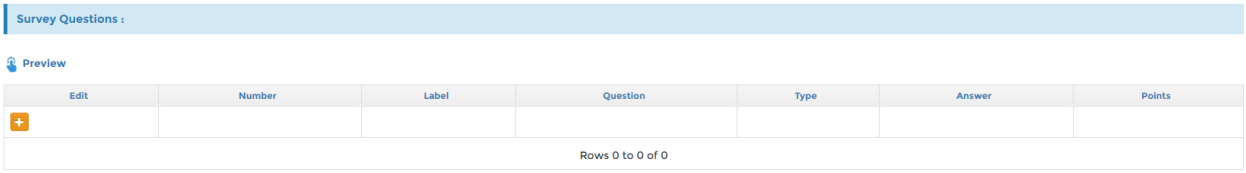
- Assessment Points – score
- Size – defines the length of field
- Subject List – set your list values here

- Header – questionnaire header text
- Footer – questionnaire footer

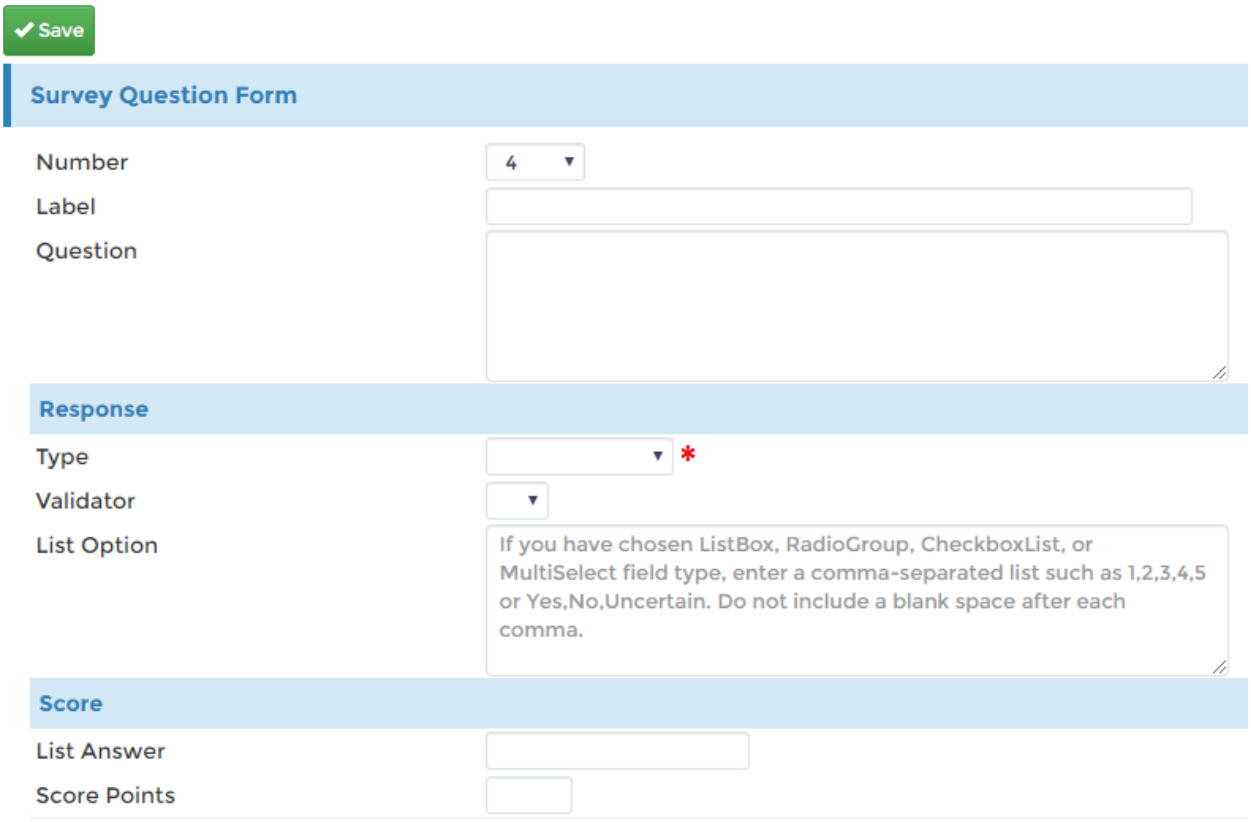
5. Questions



- Click the Questions button to add a question

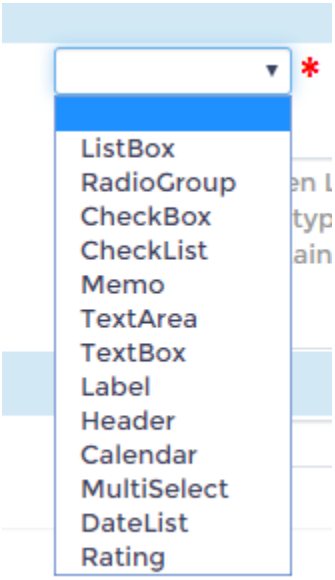


- Click the + button to add a question



- Number – order where the question appears on the list
- Label – question name
- Question – the Question itself

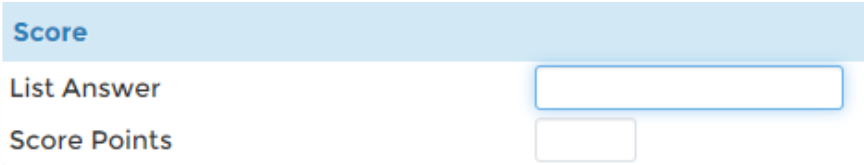
- Type – what kind of response



  - Listbox -you can do a predifned list of answers the candidate can pick from, List Option will list these answers
  - Radio group – set the questions as a radio group, only one answer from the list can be selected
  - Checkbox – similar to the list box only presented as a checkbox with you defining the answers
  - Checklist – multiple answers can be selected from answers you set on the list
  - Memo – field
  - TextArea – big text area to type in your answers
  - TextBox – small text field
  - Label – section Label
  - Header – form header
  - Calendar – date picker
  - MultiSelect – a multi select tool to pick answers from
  - DateList – Date list to select a date from
  - Rating – scores

- Validator – these are tied to the type and will dynamically change based on your selection
- List option – used if you are using a list, this will be you answer pool for your question types (only applies to lists)

6. Score



  - List Answer – define an answer you want
  - Score Points – points to award if the answer matches the list answer you set

7. Click Save
8. Repeat as desired to add more questions

Tip: Click the copy button to copy a questionnaire and edit, this will be easier if you are making a similar questionnaire from the existing data.

Interview Site

Setup your interview site locations here. These are the list of sites that appear when you configure an interview location. Create a new item here if you need an option but do not find it on the drop-down list.

Interview Site

Search | Clear | Advanced | xls

	Site ID	Location	Site Name	Address Detail
	1005	Sydney	Sydney office 1	Test1

Rows 0 to 0 of 0

Talent List

Setup your Talent list items here.

Talent Pool Configuration

Search | Clear | Advanced | xls

	Talent	Display Value
	Sales Gun	Sales Gun
	Good Listeners	Listeners
	great farmers	great farmers

Status List

Click this link to view the status list or add a new status for use in the recruitment portal. These are the status you set your candidates with, you can set new ones here and also attach an email template to send to your candidates from here.

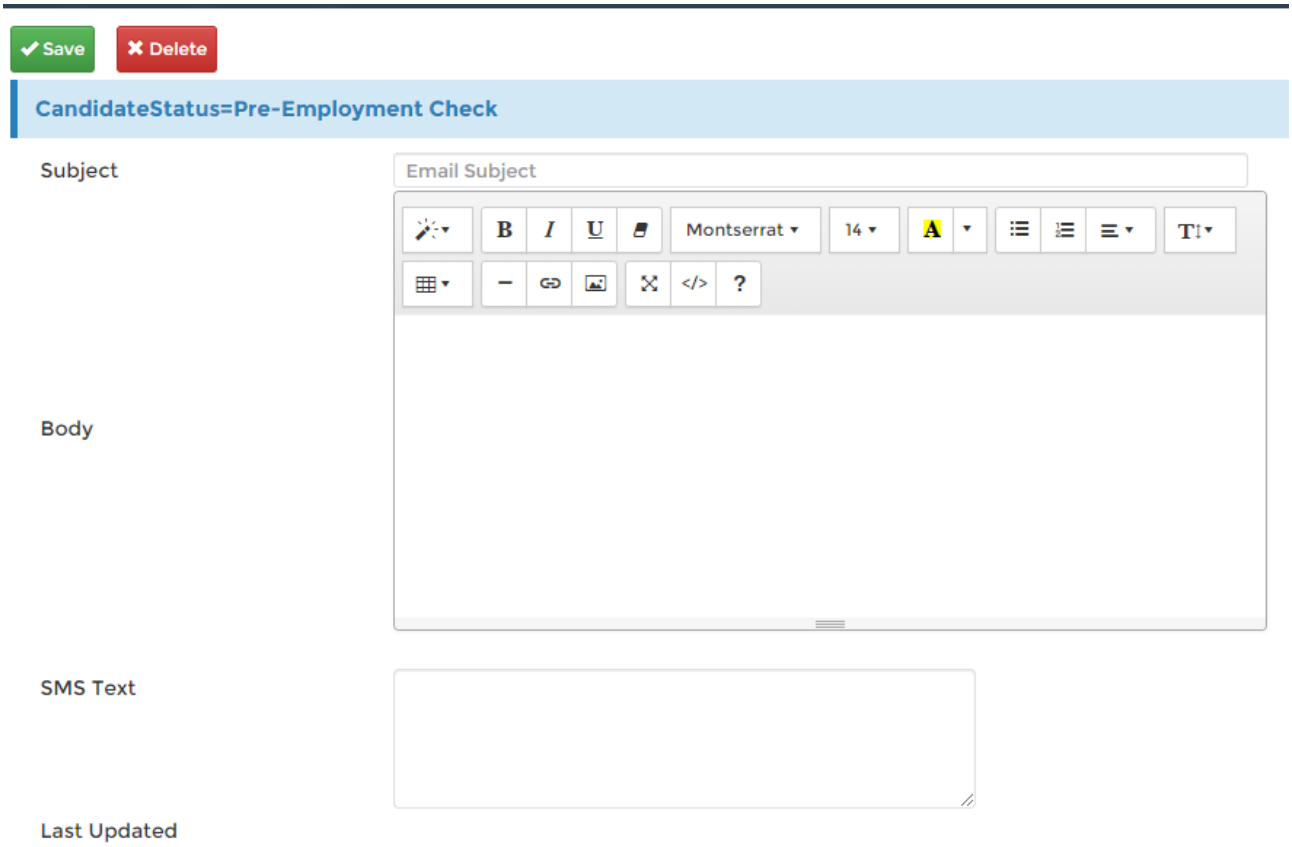
Candidate Status Configuration

Search | Clear | Advanced | xls

	Status	Display Value	Funnel	Promote	Order
	Void	Junk/Void	Void		2
	Unsuccessful	Unsuccessful	Unsuccessful		4
	Referral	Referral	Application	Assessment	6

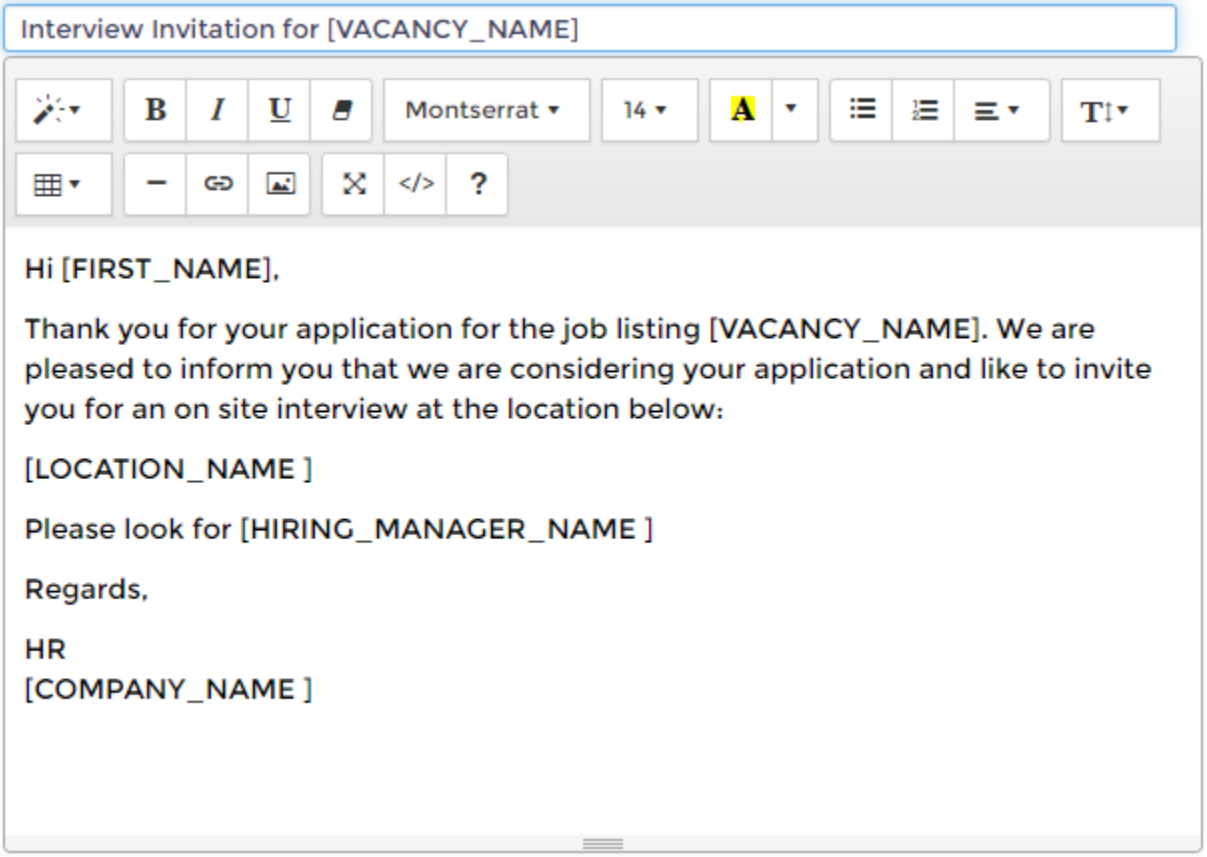
How to Create Status and set up the Auto Email Templates

1. Navigate to HR > Recruitment > Setup > Status List
2. Click the + button to add a new status
3. Enter a Status
4. Enter the Display Value that shows on the interface and reports
5. Select a Funnel from the drop down, is this part of any funnel like Unsuccessful for example
6. Select Promote setting, this is the next status this will fall under if you click Promote from the report
7. Select Order number
8. Click the + button under Notification to set up a notice



Notification fields

- Subject – Email subject
- Body – Email body/copy
- SMS Text – data to send if sending the message via sms
- Substitution fields – these merges fields within the candidate info for use on your notifications, the list below shows the substitution fields that will work for this notification template
    - [FIRST_NAME]
    - [LAST_NAME]
    - [NATIVE_NAME]
    - [VACANCY_NAME]
    - [COMPANY_NAME]
    - [LOCATION_NAME]
    - [MANAGER_NAME]
    - [HIRING_MANAGER_NAME]
    - [START_DATE]
    - [PROBATION_DATE]
    - [USERNAME]
    - [PASSWORD]
    - [URL]



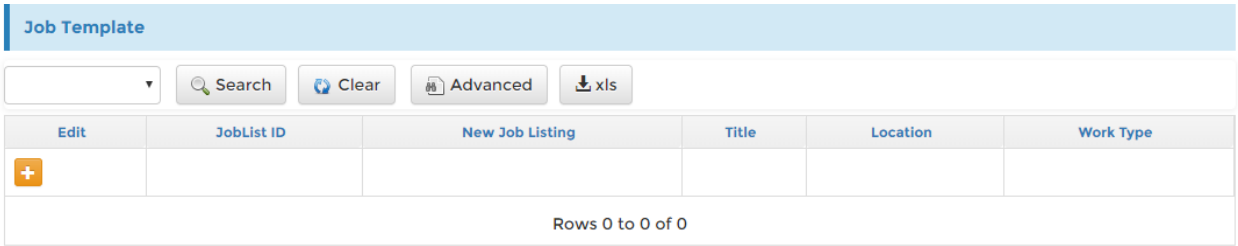
The sample above shows a template with the substitution fields used in an Interview Invite.

9. Click Save

These auto notification will now be the templates used when you set the appropriate status and choose to notify the candidates via the notification page from the recruitment module.

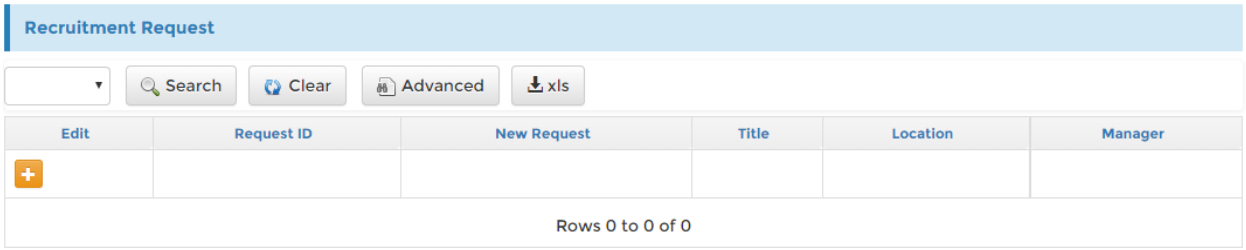
Job Templates

You can use job templates to create a base job for use multiple times, very useful when your jobs listings have similarities and having a template to allow minor edits will expedite the process of creating new jobs.



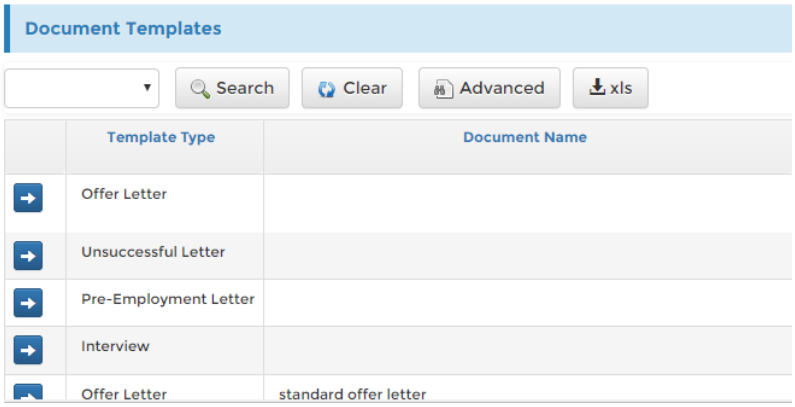
Request Templates

Click this link to create a Recruitment Request template.



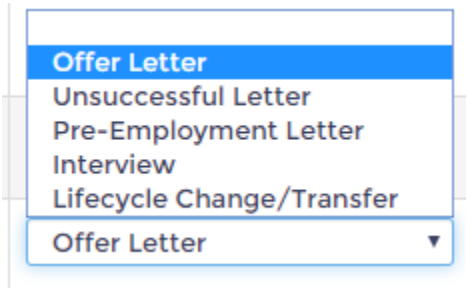
Document Templates

Click on this link to upload document templates for Offers/Contracts, Interview letter, Pre-employment letter etc. These are all templates that will appear on different forms in EC like the Offer page, Interview email page, unsuccessful email form etc. in the form of a drop-down list and uses word-merge to substitute standard text to EC fields. The advantage of this is it will cut down the time you have to create these letters since we have templates for them already.



How to Create Document Templates

1. Navigate to HR > Recruitment > Setup > Document Templates
2. Click the + button to add a new Document Template
3. Select which type



4. Enter a Document Name, this appears on the picklist on the forms
5. Optionally enter a description
6. Click Choose File to select a document to upload
7. Leave the Active checkbox ticked
8. Click the green check mark to save

How to Use Substitution for Offer Templates

1. Open your Offer document in Word
2. Highlight the field to substitute with EC merge fields, see highlighted “BIG COMPANY GROUP (COMPANY)”

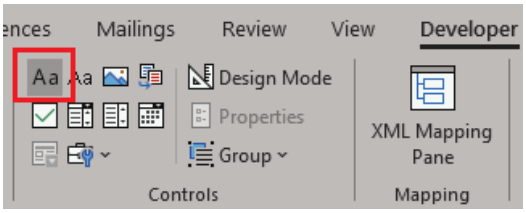
Dear Click here to enter text.,

Employment Agreement

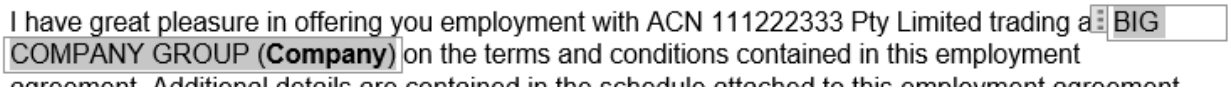
I have great pleasure in offering you employment with ACN 111222333 Pty Limited trading as BIG COMPANY GROUP (**Company**) on the terms and conditions contained in this employment agreement. Additional details are contained in the schedule attached to this employment agreement (**Schedule**). Together, this employment agreement and the Schedule form your contract of employment (**Contract**).

3. Click Developer from the menu bar

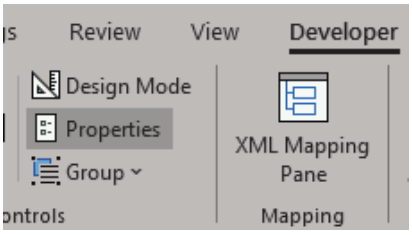
4. Click Rich Text Control



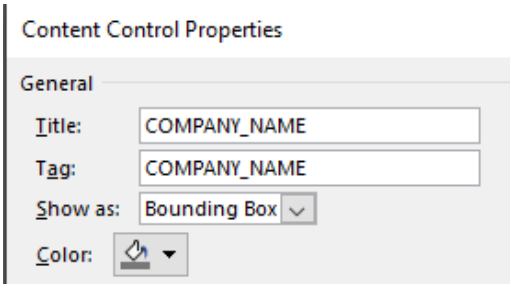
5. A bounding box will appear



6. Click Properties from the tool bar



7. Enter the EC Merge Field, refer to the merge field list, COMPANY_NAME



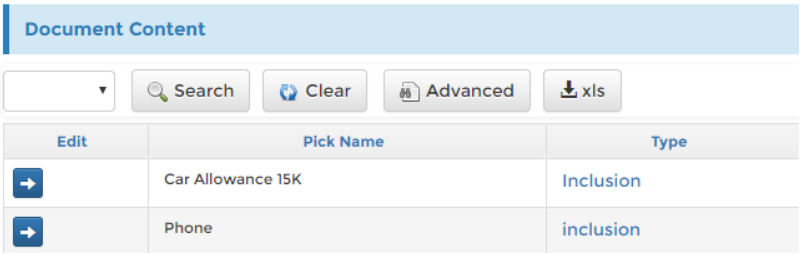
8. Click OK
9. Repeat for other fields like the Name of the candidate, position name etc

10. Save your document
11. Follow “How to create document templates” section to upload the template to EC Offer

Your document will use the EC fields linked to the fields in the offer form, this automates the creation of the offer allowing you to create templates for use on multiple offer letters without having to edit them everytime.

Merge Content

Click on this link to setup your offer inclusions. These appear on the offer form when creating an offer.



SEEK Integration

Click on this link to access the SEEK integration setup page, you input your SEEK related IDs and credentials here to enable SEEK integration. The setup is straight forward and only really requiring that you have access to your SEEK IDs.