



EmployeeConnect
Work. Flow. Smarter.

Recruitment

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

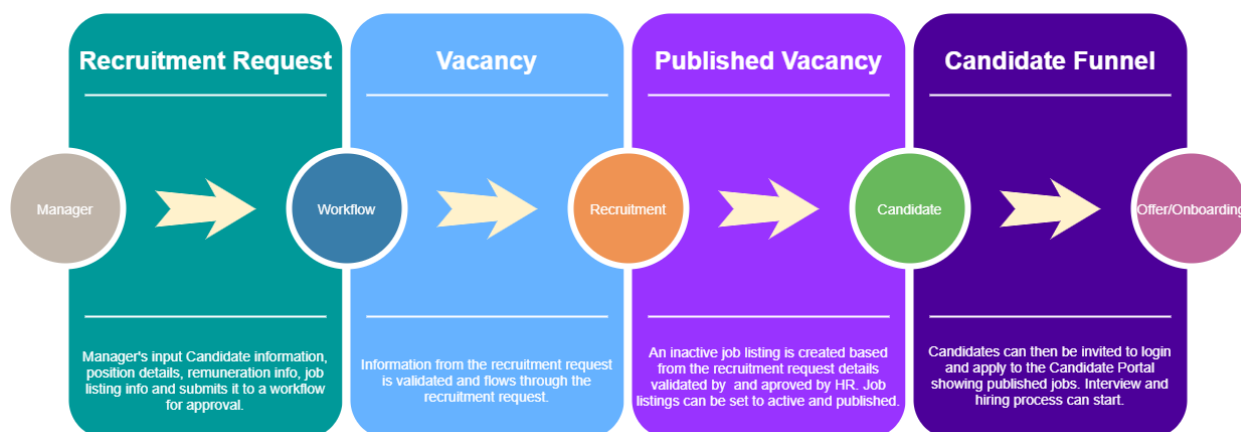
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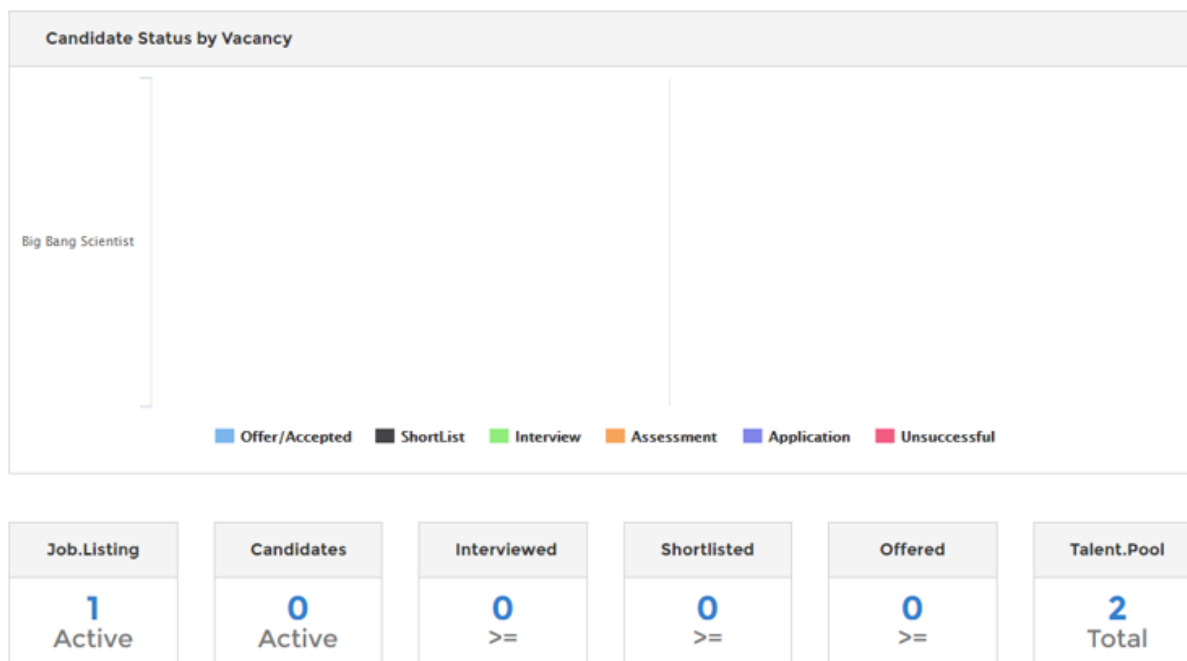
Introduction

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 Dashboard



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.

Recruitment Filter

Job Listing

Recruitment Source

Candidate Type

Application Status

☐ Offer
☐ Junk/Void
☐ Unsuccessful
☐ Referral
☐ Application
☐ Assessment
☐ Interview
☐ Shortlist
☐ Accepted
☐ OnBoarding

Sort Order

Candidate Sort Order

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.

Search Talent Pool

Favorite

Recruitment Source

Candidate Type

Candidate Status (ctrl-click)

Offer

Junk/Void

Unsuccessful

Referral

Application

Vacancy / Assessment

Vacancy

Job Location

Rating

Review Panel

1

2

3

4

5

Candidate Application

Candidate Name

Email

Submit Date

Notice Period

Contains

Exact

Since

Resume Search

Key Words

Key 1

Key 2

Key 3

And

Or

Talent Search

Talent Tags (max.5)

And

Or

Clear Search

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.

Candidates														
Filter														
<input type="text"/> Search <input type="button" value="Clear"/> <input type="button" value="Advanced"/> <input type="button" value="xls"/>														
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	arikopoulos@gmail		Unsuccessful		Assistant Accountant		9	Open	24-10-2019	External	ADMIN
	1037	Kopoulos	Ari	arikopoulos@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.

A

Ari Kopoulos

Assistant Accountant (9)

Status : Unsuccessful

Location :

Submit Date : 2019-10-24

Manager :

Availability :

Personal

Resume

Questionnaire

Qualifications

Assessment

Interview

References

Pre-Employment

Ari Kopoulos

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.

Search Talent Pool

Favorite

Recruitment Source

Candidate Type

Candidate Status (ctrl-click)

Junk/Void

Unsuccessful

Referral

Application

Assessment

Vacancy / Assessment

Vacancy

Job Location

Rating

Review Panel

1

2

3

4

5

Taylor, Mitchell

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.

	Request ID	Title	Vacancy Status	New Hire Count	Position ID	Location	Manager	Request Date	Submit By
➡	16	Test_PJT	Open	1	ACC		Nikols, Steve	17-02-2020	Taylor, Mitchell
➡	14	Peter test	Open	1	ACC		Nikols, Steve	07-02-2020	Taylor, Mitchell

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.

Job Listing

Title *

Active Status ☒ Active ☐ Inactive *

Publishing Job Posting Position / Salary Costing

Publish Start Date

Publish End Date

Recruitment Owner Taylor, Mitchell

New Hire Count

Delivery

Publish Internal Staff ☒

Publish Careers Website ☒

Publish Candidate Portal ☒

Portal Questionnaire

Video URL

Comments

Comments

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

Candidate Portal

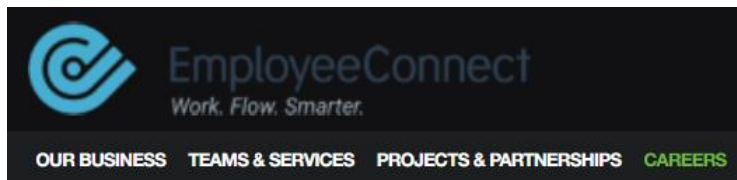
Click Candidate Portal to view job listings published to your candidate portal. You can also publish new changes done to the candidate portal listings by clicking the Publish button to get those changes to the candidate portal at once.

Candidate Portal Joblisting							
Publish	Last Update : 19-11-2019						
➔	Search	Clear	Advanced	Download xls			
View	Position	Post Date	Location	Hiring Manager	Work Type	ID	
➔	Assistant Accountant	18-10-2019				9	https://demo.datakiosk.com/GUEST/login.aspx?Userna
➔	ShutDown Coordinator	08-05-2019	Auckland	Perrin , Christina	Part-time	5	https://demo.datakiosk.com/GUEST/login.aspx?Userna

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.

✓ Save

SEEK Job Posting

Publish to SEEK ☐ Post ☐ Expire ☐ Pending

Active Status ☒ Open ☐ Closed

Title

Publishing Job Posting Salary / Category Invisible Salary Ranges

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 / Recruitment Costing

Recruitment Costing

Search

	Request ID	Title	Position ID	Location	OrgUnit
<input type="button" value="➔"/>	N47C7YJ7FO4Q56UIFWSS	new job	POS006	Sydney	1029
<input type="button" value="➔"/>	VG7KK43RVK1DI7CY8ZDE	testasta			
<input type="button" value="➔"/>	69TGQTKAN6WV6M7ILVC1	Administrative Officer		Sydney	1029

☰ / Candidate / Recruitment Costing / 1

✓ Save

Recruitment Costing

JobList ID 1

Title Big Bang Scientist

Position POS001

Company

Location Sydney

Employment Type Full-time

Budget

Recruitment Budget \$..

Currency

Allocation

OrgUnit 1029

Cost Centre

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.

Candidate Status

Filter

Search

Clear

Advanced

xls

Refresh

Submit

Dash Board	ID	Last Name	First Name	Resume	Promote	Drop	Funnel	Status	Rating	DNH	Edit	Job Listing	Location	JobList ID	Submit Date
	1021	Kopoulos	Ari				Unsuccessful	Unsuccessful	☆☆☆☆☆			Assistant Accountant		9	24-10-2019
	1037	Kopoulos	Ari				Offer	OnBoarding	☆☆☆☆☆			TEST POSITION PT		13	24-10-2019

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 / Notification

Candidate Email Notification

Filter

Search

Clear

Advanced

xls

Email	ID	Last Name	First Name	Resume	Status	UNS	POR	CRM	OFF	ONB	Sent Date	Job Listing	Location	JobList ID	JobList Status	Submit Date	Type	Source
	1021	Kopoulos	Ari		Unsuccessful						14-02-2020	Assistant Accountant		9	Open	24-10-2019	External	ADMIN
	1037	Kopoulos	Ari		OnBoarding							TEST POSITION PT		13	Open	24-10-2019		ADMIN

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.

Candidates									
<div> <div>Filter</div> <div> <div></div> <div>Search</div> <div>Clear</div> <div>Advanced</div> <div>Download xls</div> </div> </div>									
Edit	ID	Last Name	First Name	Email	Resume	Status	ReApply DNH	Job Listing	Location
	1001	Stark	Harry	ari@employeeconnect.com		Accepted		CardioVascular Surgeon	Sydney
	1003	Kopoulos	Ari	aricoche@bigpond.net.au		Offer		Big Bang Scientist	Sydney

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.

Message Log								
<div> <div></div> <div>Search</div> <div>Clear</div> <div>Advanced</div> <div>Download xls</div> </div>								
Message	ID	Last Name	First Name	Address	Status	Local Timestamp	System Timestamp	Subject
	1003	Test	EC	s@gmail.com	sent	14/08/2018 01:32	2018-08-14 01:32:06	Employee Onboarding Offer of Role

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 by clicking on the envelope button under the Send to Candidate column.

Candidate Offer

Search

Clear

Advanced

xls

Offer	Offer Letter	ID	Last Name	First Name	Resume	Status	Workflow	Workflow ID	Workflow Status	Workflow Date	Send to Candidate	Offer Sent Date	Offer Expiration	Start Date
		1008	t	s		Offer								
		1003	Test	EC		Offer								17/02/2020
		1006	TEST	Joseph		Offer								27/01/2020
		1007	Test	Sheryll		Offer								17/02/2020

Rows 1 to 4 of 4

Rows 1 to 4 of 4

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.

Offers													
<div>Filter</div> <div> <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Advanced"/> <input type="button" value="xls"/> </div>													
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.

Candidate On-Boarding													
<div>Filter</div> <div> <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Advanced"/> <input type="button" value="xls"/> </div>													
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.

On-Boarding Progress												
<div> <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Clear"/> <input type="button" value="Advanced"/> </div>												
Complete	ID	Name	Start Date	BIR	ADR	TAX	TFN	BAN	SUP	EMC	MED	NAT
✗	1224	Kopoulos, Ari	20-02-2020	●	●	●	●	●	●	●	●	●
✗	1223	No info, Peter Migrate	19-02-2020	●	●	●	●	●	●	●	●	●
✗	1222	Tan Manager, Peter	14-02-2020	●	●	●	●	●	●	●	●	●
✗	1164	Liquidlearning , Alyssa	21-03-2017	●	●	●	●	●	●	●	●	●
<div> <div>1 2</div> <div>Rows 1 to 25 of 44</div> </div>												

Setup

To access the data, click on the icon for the specific employee.

- - Data for this employee is required, but incomplete
- - Data for this employee is optional, and incomplete
- - There is current data available for this employee

This is the LifeCycle On-Boarding Setup form

Save

Lifecycle On-Boarding Setup

On-Boarding Period Days

Promote to Employee

Promote Configuration

Promote Security Group

Manual

Automatic

Start Date

Employee

On-Boarding Complete ● ● ●

Birth Date	Required	Optional	Unused
Address	Required	Optional	Unused
Tax Number	Required	Optional	Unused
Bank Account	Required	Optional	Unused
TFN Declaration	Required	Optional	Unused
Pension (Superannuation)	Required	Optional	Unused
Emergency Contact	Required	Optional	Unused
Medical	Optional	Required	Unused
Pension	Optional	Required	Unused
Membership	Optional	Required	Unused
Licence	Required	Optional	Unused
Education	Optional	Required	Unused
Training	Optional	Required	Unused
Induction Survey	Optional	Required	Unused
Tasks Completed	Optional	Required	Unused
Policies Accepted	Required	Optional	Unused

Promote to Employee Setting can be configured below 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.

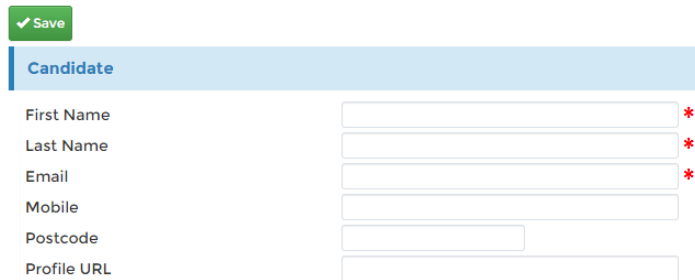
Promote Configuration defines what configuration they will be set to after they complete on-boarding, this should be equal to your Kiosks configuration e.g. Cirrus. Please make sure to talk to your EmployeeConnect consultant if you are unsure.

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.

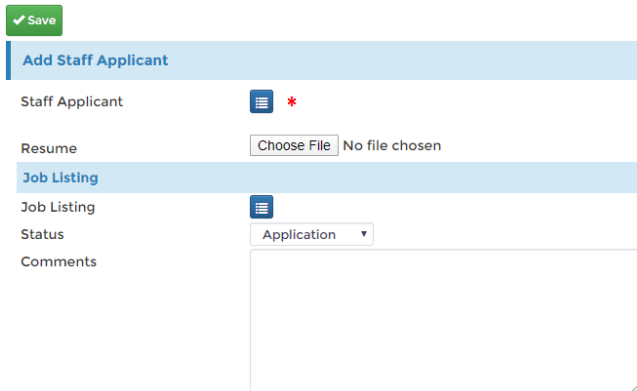


The screenshot shows the 'Add Candidate' form. At the top left is a green 'Save' button with a checkmark. Below it is a light blue header bar with the word 'Candidate'. The form contains several input fields: 'First Name', 'Last Name', 'Email', 'Mobile', 'Postcode', and 'Profile URL'. Each of the first three fields has a red asterisk to its right, indicating they are required. The 'Mobile' field is also marked with a red asterisk. The 'Postcode' and 'Profile URL' fields are not marked as required.

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.



The screenshot shows the 'Add Staff Applicant' form. At the top left is a green 'Save' button with a checkmark. Below it is a light blue header bar with the text 'Add Staff Applicant'. The form contains several fields: 'Staff Applicant' (with a red asterisk), 'Resume' (with a 'Choose File' button and 'No file chosen' text), 'Job Listing' (with a dropdown menu), 'Status' (with a dropdown menu), and 'Comments' (with a large text area). The 'Job Listing' and 'Status' dropdowns are currently set to 'Application'.

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.


✓ Save


Internal Referral

Referred By admin


Date of Referral 09/03/2020

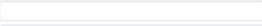
Job Listing 


Relationship 

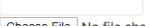
Comments 


Candidate

First Name  *

Last Name  *

Email  *

Mobile 


Resume  No file chosen

Quick Offer

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


✓ Save


Candidate Offer Word-Merge

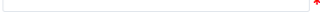
Job Listing 

Author


Candidate Offer Employment Remuneration


First Name  *


Last Name  *


Email  *

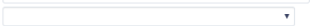
Postal Address


Street 1 


Street 2 

Street 3 

Suburb 

City 

Country 

State 

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

Candidate Offer Word-Merge

Job Listing ▼

Author

Candidate
Offer
Employment
Remuneration

Start Date

Probation Date

End Date

Offer Expiration (End-of-Day)

Offer Comments

Offer Letter

Offer Template ▼

Additional Inclusions [Edit](#)

Available

- Car Allowance 15K
- Phone
- Notice Period
- Restraint
- Shutdown
- 3.5 MONTH NOTICE
- Car Allowance 10K
- Inclusion

Selected

Attachment Choose File No file chosen

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

Candidate Offer Word-Merge

Job Listing

Author

Candidate
Offer
Employment
Remuneration

Position

Manager

Position

Company

Location

Organisation Unit

Employment

Industrial Instrument

Classification

Public Holiday Group

Work Type

Work Hours

Work Period

Contract Start Date

Contract End Date

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

Candidate Offer Word-Merge

Job Listing

Author

Candidate
Offer
Employment
Remuneration

Pay Basis

Currency

Salary

Pay Rate

NonStandard Rate

Pension

Package Value

Pay Grade

Comments

Individual Components

Component 1

Amount 1

Component 2

Amount 2

Component 3

Amount 3

Component 4


Amount 4

Component 5

Amount 5

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



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Work. Flow. Smarter.

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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.

Candidate Portal Joblisting						
<div> <div>Publish</div> <div>Last Update : 19-11-2019</div> </div>						
<div> <div></div> <div>Search</div> <div>Clear</div> <div>Advanced</div> <div>xls</div> </div>						
View	Position	Post Date	Location	Hiring Manager	Work Type	ID
	TEST POSITION PT	04-02-2020		Abraham, Mathew		13
	Service Coordinator	19-11-2019				10
	Assistant Accountant	18-10-2019				9

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.

Candidate Portal Invitation												
<div> <div>Filter</div> <div></div> <div>Search</div> <div>Clear</div> <div>Advanced</div> <div>xls</div> </div>												
ID	Last Name	First Name	Resume	Sent Date	Login Username	Last Login	Status	UNS	POR	CRM	OFF	ONB
1021	Kopoulos	Ari					Unsuccessful					
1037	Kopoulos	Ari					OnBoarding					
1044	For guide	For guide					Offer					

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	<input type="text" value="Peter@employeeconnect.com"/>
Mobile	<input type="text"/>
Comments	<div style="border: 1px solid #ccc; height: 80px;"></div>
Notification	
Method	<input checked="" type="radio"/> Email <input type="radio"/> Mobile
Subject	<input type="text" value="Invitation to Candidate Portal"/> <div> 🔍 B I U 📄 Montserrat ▾ 14 ▾ A ▾ ☰ ☷ ☹ T¹ ▾ </div> <div> ☰ ▾ - GO 🖨 ✂ </> ? </div> <p>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]</p>
Body	
SMS Text	<div style="border: 1px solid #ccc; height: 100px;"></div>
Attachment	<input type="button" value="Choose File"/> No file chosen <small>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.</small>
Substitution	

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

Download xlsx

ID	Last Name	First Name	Resume	Verified	Sent Date	Email	Last Login	Jump
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.

▼ Filter

	Search	Clear	Advanced	xls							
Dash Board	ID	Last Name	First Name	Resume	Email	Status	Invite	Reminder	Personal	Questionnaire	References
	1021	Kopoulos	Ari		arikopoulos1@gmail	Unsuccessful					
	1037	Kopoulos	Ari		arikopoulos1@gmail	OnBoarding					

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.

Configuration Name	Candidate Portal
--------------------	------------------

Nightly Update 
Last Update 09-03-2020 17:02

Enterprise Name

The screenshot shows the 'Enterprise Name' editor. The title bar reads 'Sandbox - Candidate Portal'. The toolbar includes icons for undo, redo, bold, italic, underline, list, link, unlink, and a help icon. The font is set to 'Montserrat', size '14', and color 'A'. The content area displays 'OUR PORTAL' with a green underline, a circular arrow icon, a blue icon, and a 'PROGRESS' bar. A 'Picture' tooltip is visible over the 'OUR PORTAL' text. The bottom of the editor shows a green bar with the text '1. REGISTER YOUR'.

Application Format ☐ Simple ☐ Wizard ☐ Custom

Application Confirmation	Confirmation message on submit of application
--------------------------	---

Offer Instructions	Instructions on offer acceptance panel
Offer Acceptance	Confirmation on offer acceptance

System Defaults	
Menu Layout	Candidate_Layout.xml
Country	Australia
Date Format	
Time Format	
Currency	
Charset	
Language	
Time Zone	
Name Format	
Look and Feel	HR 3.3

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 Publish	
Portal Data	Vacancy *
Database	GUEST *
Last Update	9/03/2020 5:02:10 PM
NOTE : A batch job will publish the portal data hourly.	

Candidate Portal Preview

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

Home

Filter Menu

Job List

File Attachment

Reference

Personal Information

Experience

Nationality

Education

Language

Licence

Signature (test)

Candidate Portal Preview

Sandbox - Candidate Portal

Begin the Journey

REGISTER YOUR

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	Auckland	5
Neurologists Agency	13-07-2019		1006	Zoroast	Shamaa		Unsuccessful	ShutDown Coordinator	Auckland	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.

Candidate Notification			
	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Clear"/>
		<input type="button" value="Advanced"/>	
Edit	Message Name	Comments	
	1. New Application Notification to Applicant		Thank you for your applicati

How to edit Email Templates

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

Candidate OnBoarding Message

Subject: [Company_Name] Employee OnBoarding

Body:

Hi [First_Name] We would like to take the opportunity to welcome you in your new role. Your profile has been setup on EmployeeConnect with a username and password: URL: [URL] Username: [USERNAME] Password: [PASSWORD]

SMS Text:

Substitution

[FIRST_NAME]
[LAST_NAME]
[NATIVE_NAME]
[VACANCY_NAME]
[COMPANY_NAME]

[USERNAME]
[PASSWORD]
[URL]

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.

Surveys								
	Search	Clear	Advanced					
Edit	Questions	Name	Copy	Type	Enabled	Start	End	Preview
		Candidate Interview		Questionnaire	True			
		EC Interview Guide		Questionnaire	True			

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 Detail

Survey

Layout

Questions

Survey Detail

Survey ID

apkra3me8ll7ldlr5bq

Survey Name

Description

Type

☒ Questionnaire
 ☐ Assessment

Accessibility

Enabled

☒ True
 ☐ False

Start Date

End Date

Scope

☒ Candidate
 ☐ Lifecycle
 ☐ Engagement
 ☐ OHS

- 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

Survey Detail

Survey

Layout

Questions

Form Layout

Assessment Pass Points

Points

Size

Subject List

Permits list value to be defined that can rela

Header

Footer

- 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

Survey Detail

Survey

Layout

Questions

Questions

Number	Label
No data	

- Click the Questions button to add a question

Survey Questions :

Preview

	Edit	Number	Label	Question	Type	Answer	Points
+							

Rows 0 to 0 of 0

- Click the + button to add a question

Save

Survey Question Form

Number

4 ▼

Label

Question

Response

Type

▼ *

Validator

▼

List Option

If you have chosen ListBox, RadioGroup, CheckboxList, or MultiSelect field type, enter a comma-separated list such as 1,2,3,4,5 or Yes,No,Uncertain. Do not include a blank space after each comma.

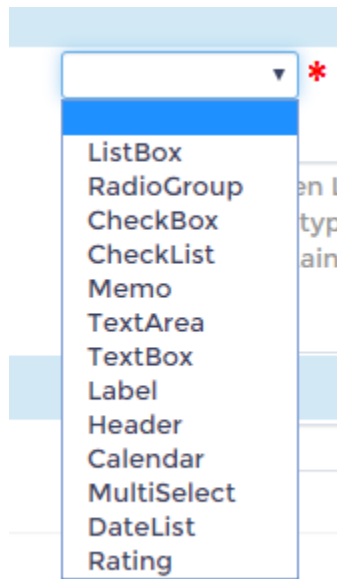
Score

List Answer

Score Points

- 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 predefined 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 your answer pool for your question types (only applies to lists)

6. Score

Score	
List Answer	<input type="text"/>
Score Points	<input type="text"/>

- 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

✓ Save

✗ Delete

CandidateStatus=Pre-Employment Check

Subject

Email Subject

Rich text editor toolbar with the following options:

- Text color (dropdown)
- Background color (dropdown)
- Bold (B)
- Italic (I)
- Underline (U)
- Strikethrough (ABC)
- Font family (Montserrat)
- Font size (14)
- Text color (A)
- Bulleted list
- Numbered list
- Indent list
- Outdent list
- Link (T)
- Table
- Decrease indent
- Link
- Image
- Unlink
- Source code (</>)
- Help (?)

Body

SMS Text

Last Updated

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]

Interview Invitation for [VACANCY_NAME]

Hi [FIRST_NAME],

Thank you for your application for the job listing [VACANCY_NAME]. We are pleased to inform you that we are considering your application and like to invite you for an on site interview at the location below:

[LOCATION_NAME]

Please look for [HIRING_MANAGER_NAME]

Regards,

HR
[COMPANY_NAME]

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.

Job Template					
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="Search"/>	<input type="button" value="Clear"/>	<input type="button" value="Advanced"/>	<input type="button" value="xls"/>		
Edit	JobList ID	New Job Listing	Title	Location	Work Type
<input data-bbox="203 1543 235 1585" type="button" value="+"/>					
Rows 0 to 0 of 0					

Request Templates

Click this link to create a Recruitment Request template.

Recruitment Request






Edit	Request ID	New Request	Title	Location	Manager
					

Rows 0 to 0 of 0

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.

Document Templates

	Template Type	Document Name
	Offer Letter	
	Unsuccessful Letter	
	Pre-Employment Letter	
	Interview	
	Offer Letter	standard offer letter

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

Offer Letter
Unsuccessful Letter
Pre-Employment Letter
Interview
Lifecycle Change/Transfer
Offer Letter

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

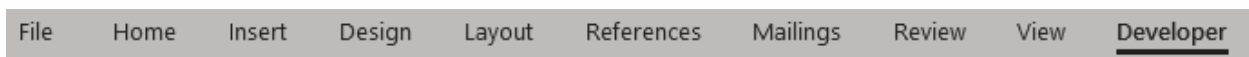
1. Open your Offer document in Word
2. Highlight the field to substitute with EC merge fields, see highlighted "BIG COMPANY GROUP (COMPANY)"

Dear Click here to enter text,

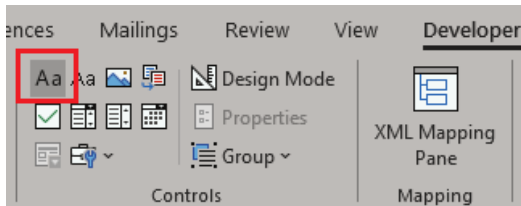
Employment Agreement

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



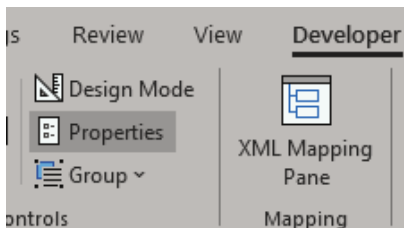
4. Click Rich Text Control



5. A bounding box will appear

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

6. Click Properties from the tool bar



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


Content Control Properties

General

Title:

Tag:

Show as: ▼

Color:  ▼

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.

Document Content

Edit	Pick Name	Type
➔	Car Allowance 15K	Inclusion
➔	Phone	inclusion

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.

SEEK Integration Setup

CLR_WebCall

Job Post Configuration

Advertiser ID
 Use Standout ☒ Yes ☐ No

Application Retrieval Configuration

Import application/s from SEEK ☒ Yes ☐ No
 Application Retrieval Username
 Application Retrieval Password