Recruitment Module Quick Guide

How To Use Recruitment Module

Recruitment Module Quick Guide

1. What is the Recruitment Module?

The Recruitment module allows the users to have a meaningful collaboration and bring up discussions about recruitment. It serves the following purposes:

1) To request for a recruiting person to create a new job position or replace an employee that resigned.
2) To track job openings in all offices.
3) To ensure that the concerned people (e.g. immediate supervisor of the person for the job position and the senior management) are informed of the job description and job requirements.
4) To track the response to the advertisement and to decide if the advertisement should be revised.
5) To measure the effectiveness of the advertising media.

2. How can I access the Recruitment Module?

The Recruitment module can be accessed in different ways:

2.1.   Dashboard
1. Upon logging in, you will be directed to the dashboard/homepage.
2. Clicking the Recruitment link from the left side menu of the page or module abbreviation through the module widget (RE) will redirect you to the module's summary page.

2.2.   Menu Tab > Operations & Admin category

1. You can also access the module through the menu header tabs by going to the Operations & Admin tab/category where you can see the Recruitment link.

Recruitment Module Quick Guide

2. Clicking the link will redirect you to the summary page.

3. How can I add a new Job Position or Recruitment item?

You can easily add a recruitment item through the summary table. Simply click the "Add Job Position" button located on the rightmost side of the State Bar. If you don't see this button, please contact your system administrator.
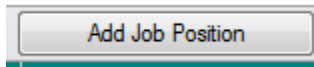
Add Job Position

3.1.   Add Recruitment Field Details

1. Recruitment Type – select the recruitment type of your item. Some types might have approval settings. The recruitment type's approvers depend on the department and office settings and are defined by the System Administrator. Selecting a type with approval settings will enable the Approval Phase field in this page and will display the approvers in the details page of the recruitment item.

2. Job Position – type the title of the job position or recruitment item.
3. Description – type the description of the recruitment item.
4. Requirements – type the requirements of the job position.
5. Other Remarks – type additional information or remarks about the job position or recruitment item.
6. State – by default, this field is disabled, as a new recruitment item must have the Open state. In the case you need to change the state, you can edit the recruitment topic or move it to other states through the state bar.
7. Priority – select the priority of your recruitment item.
8. Interviewers – select one or more interviewers for the job position. Selected users will automatically be added in the access rights list upon saving the item.
9. Department – select the department where the recruitment item belongs or is related to.
10. Office – select the office where the recruitment item belongs or is related to.
11. Recruitment Status – select the status of the recruitment item.
12. Recruitment Start Date – select the start date of when the recruitment should commence.
13. Initial Deadline – select the initial date you expect the recruitment to be finished.
14. Revised Deadline – disabled in the add page, you can change the date of expected recruitment to be finished through the edit page.
15. Completed On – select the actual completion date of the recruitment.
16. Moderated By – select one or more moderators of the recruitment item. Moderators can edit the item such as change field values, add attachments, and or remove users in the access rights, etc. If you create a recruitment item, you're automatically assigned as the moderator of the recruitment item, but you can remove yourself if you feel you don't need to be the moderator. In that event you can no longer edit the item details after saving.
17. Approval Phase – disabled by default. The field will be enabled once a Recruitment Type with approval settings is selected.
18. Owner – assign the user who needs to own the recruitment item. If you create the recruitment item, your name is selected by default. If someone else needs to be the owner, you can select another user to be the owner. In that event you can no longer edit the item details after saving.
19. Immediate Respondents – select the users that you need to respond to the recruitment immediately. Typing characters in the box will filter the list of the users that have access to the RE module. They will be given notice of the updates that will be made to the recruitment item details.
20. Keywords – for easy searching or filtering of your recruitment item, it is advisable to set values for this field.
21. Initiated By – select the user who initiated the recruitment. In the event that the person doesn't have access to the module, you can have your name as the reporter which is selected by default. Upon saving the recruitment item, this field cannot be modified.

3.2. Add Recruitment Features and Functionalities

1. Attachment – you may attach files that are related to the recruitment such as resumes, advertisements etc. You are allowed to attach files up to a maximum size based on the size subscribed by your company. You can use drag and drop functionality in attaching the files.
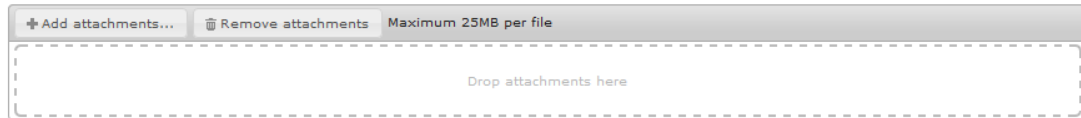
2. Access Rights – you may select other users to see your recruitment. Upon saving, the moderators, Initiator and Owner are automatically selected. In the event you removed your name in the access rights page and you're not selected as moderator, initiator or owner, you will not be able see the recruitment item you have posted.
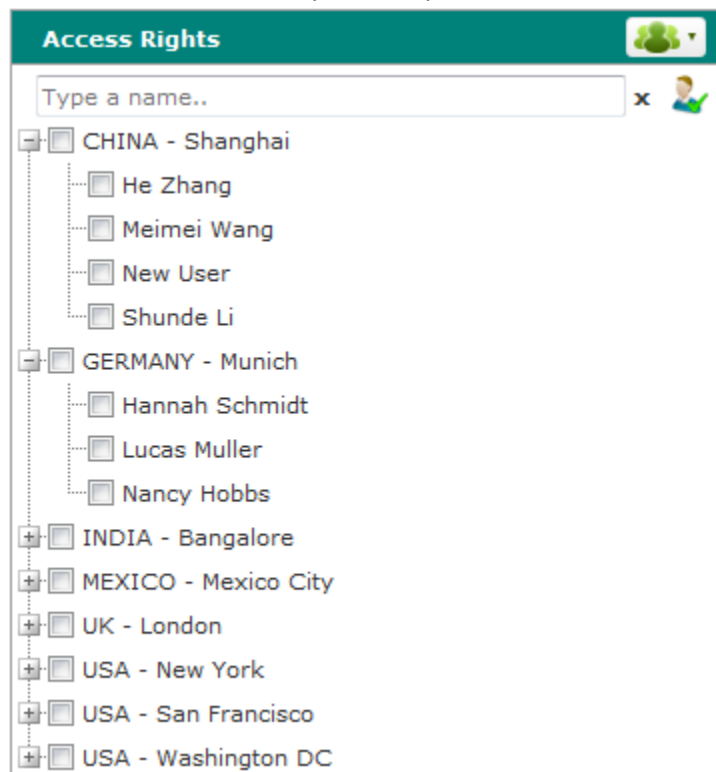
    a. User Group – you can select users under a user group through this functionality.
        *   Click the user group icon on the upper rightmost part of the Access Rights column.

        *   Default (company defined) and Customized (user defined) user groups will be shown.
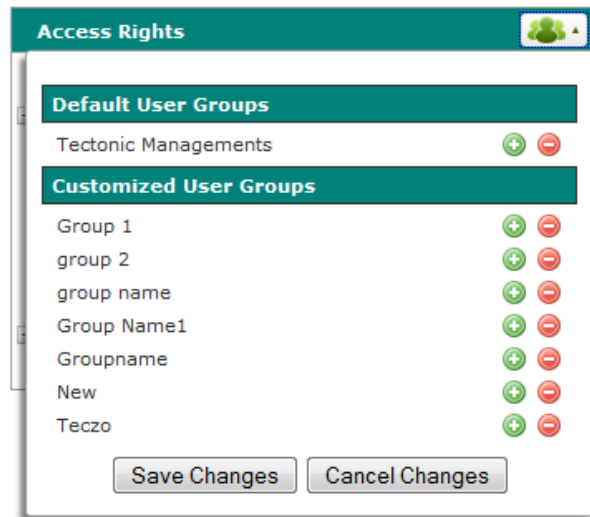
Tips: Hovering over the user group's name will show the names of the group members.

- Click the plus ⊕ icon to add the user group's members and negative ⊖ icon to remove the user group's members.
- Click the "Save Changes" button to add the members in the Access Rights list.

b. Type and Search – you can easily filter names from the list by using the type and search functionality. Simply type one of more characters of the name will filter the list of users. In case one user is listed, pressing Enter will then automatically select that user in the access rights.

c. Preview selected users – you can preview the names of already selected users by clicking the icon besides the type and search text box.
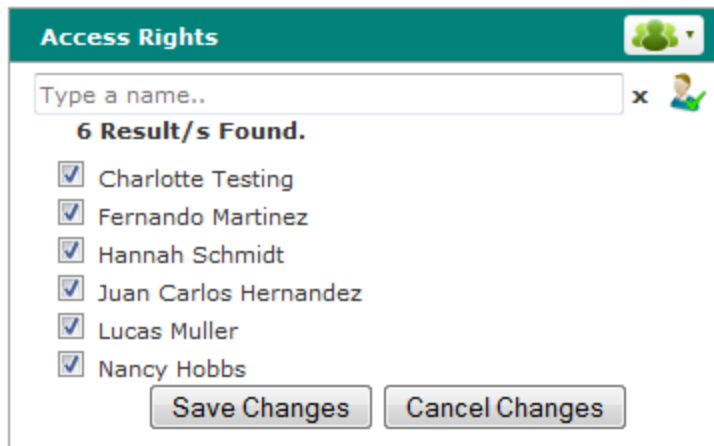
3. Fields highlighted in yellow are required fields. You need to fill in those fields to be able to save the recruitment successfully.
4. You have the following options to save or close the page:
   a. Save & New – save the recruitment and create a new one. You will be directed to the new Add page.
   b. Save & Close – save the new recruitment and return to the summary table.
   c. Back – return to summary page without saving or posting the recruitment.

## 4. Where can I see recruitments I have posted or I am included in?

The list of recruitment items posted by you or you have been given access to can be seen in the summary table. The summary table is located below the State Bar.


4.1. Summary Table Column Headers

1. Check All box –upon checking the box, selects all the recruitments currently displayed in the summary table.
2. Updated On – indicates the date when the recruitment details were last updated. If you see a time, it means the recruitment was updated on the current date at that time.
3. Updated By – indicates the name of the last user who updated the recruitment by either updating the details or making a comment.
4. RE ID – a unique item identification of the recruitment.
5. Job Position – indicates the title of the recruitment item or job position.
6. Recruitment Type – indicates the type of recruitment.
7. Office - indicates the office where the recruitment is involved.
8. Moderators – owner and moderators of the recruitment item.

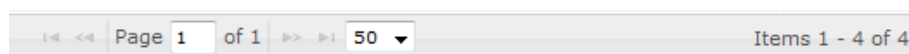### 4.2. Summary Table Features and Functionalities

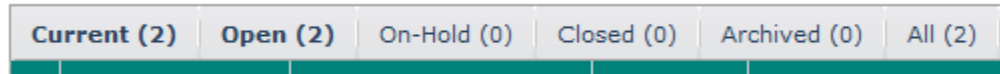1. Hovering over abbreviated values will show their description.
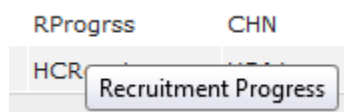
2. Hovering over the moderator's value will show the owner and moderators of the recruitment item.
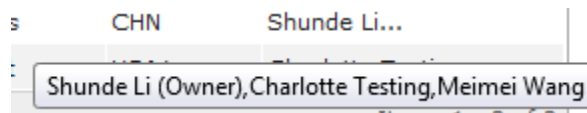
3. You can navigate to different pages through the paging feature below the summary table.

4. You can go through different states through the state bar.

5. Clicking the recruitment item row will open the details page in a pane below. Double clicking the row will open the details page in new tab.

5.   What is the Details Page?

The Details Page contains the details of the selected recruitment item. It consists of three sections, namely: the Details Column, the Comments Column and the Access Rights Tab.

Details	Edit
RE000001 - QA Engineer for Applications	

Tags

H×

Immediate Respondents

Priority:	High
Recruitment Type:	Head Count Request
Recruitment Start Date:	15Sep2014
Revised Deadline:	
Initial Deadline:	13Oct2014

Description

In this role, role will be the guardian of our outstanding customer experience. Will be able to dive into many aspects of Thumb drives, define a strategy for testing new features and functionality, and be responsible for quantifying and improving data quality across our entire site. Job is to keep our ridiculously high-quality bar set ridiculously high, and to help us identify and execute ways to raise it even higher.
The deal candidate should have a keen attention to detail and are exceptionally good at identifying inconsistencies and flaws. Can juggle several balls and not lose track of the little things.

Requirements

- Enrolled in or have completed your B.S. in Computer Science or a related field (or the equivalent experience of such a degree).
- A passion for technology and a knack for details.
- Ability to create test plans, define testing strategies, and get a kick out of uncovering those hard-to-find bugs.
- Experience with Java or another object-oriented programming language.
- Strong communication and collaboration skills.
- Excitement and passion for [Your industry]. We're cool; we hope you are too.
- Experience with SQL and databases is a plus.
- Programming experience in a Linux/Unix environment. We mostly use Java, Python, and Ruby.

Other Remarks

Miscellaneous

Department:	Customer Service
Office:	USA - San Francisco
Recruitment Status:	New
Approval Phase:	Pending for Approval

Interviewers

Charlotte Testing,Chris Jackson

Submitted By:	Charlotte Testing
Submitted On:	10Sep2014 04:36 PM
Initiated By:	Charlotte Testing
Updated By:	Charlotte Testing
Updated On:	10Sep2014 04:45 PM
Completed On:	
Closed By:	
Closed On:	
State:	Open

Keywords

Owner:	Charlotte Testing

Moderated By

Charlotte Testing

Update History List

Attachments

Archived Attachments

Approval Status		
Charlotte Testing (Chairman)	✓	✗
Mary Williams (COO - Chief Operating Officer)	✓	✗

| Comments	Topics	
		Add Comment

No comments posted.

Access Rights ◄

5.1. Details Column

1. Recruitment Details – displays values selected or entered through the Add or Edit page. Additionally, it shows the following auto-generated fields:
   a. Submitted By – name of the user who submitted the recruitment item.
   b. Submitted On – date when the record was submitted.
   c. Updated By – name of the user who last updated the recruitment record.
   d. Updated On – date when the recruitment was last updated.
   e. Closed By – name of the user who moved the recruitment to the closed state.
   f. Closed On – date when the recruitment was moved to the closed state.
2. Edit Button - if you're the moderator or owner of the recruitment item, you can see an Edit button in the upper part.
3. Attachments – here you can see the different files attached to the topic. You can archive or remove attachments here if you have edit rights.
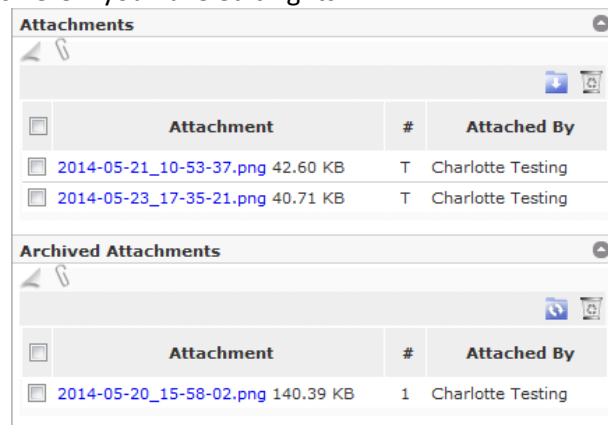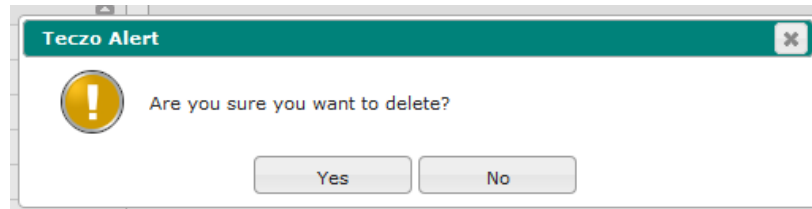

   a. Delete Attachment
      - Select one or more attachments to delete by clicking the checkbox in the first row.
   - After checking the attachments to delete, click the recycle bin icon to delete the selected attachments.
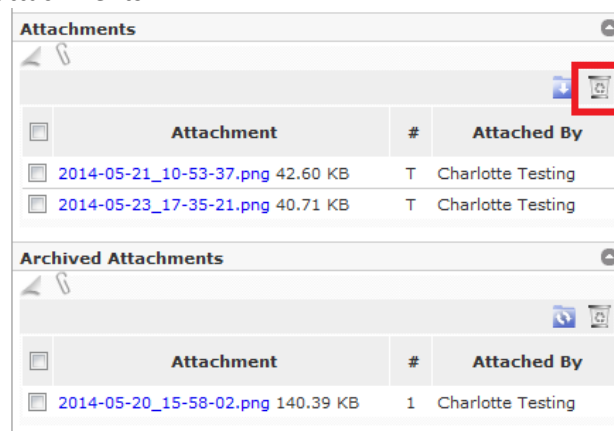
   - Confirm by clicking the "Yes" button in the alert message.

b. Archive Attachment
- Select one or more attachments to archive by clicking the checkbox in the first row.
- After checking the attachments to archive, click the archive icon to move the selected attachments.
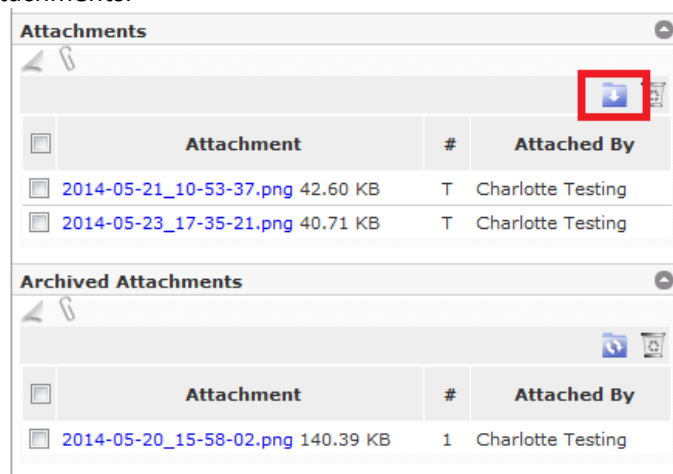
- You can restore archived attachments by selecting the attachment from the archived table by clicking the checkbox in the first row. Then click the restore attachment icon.
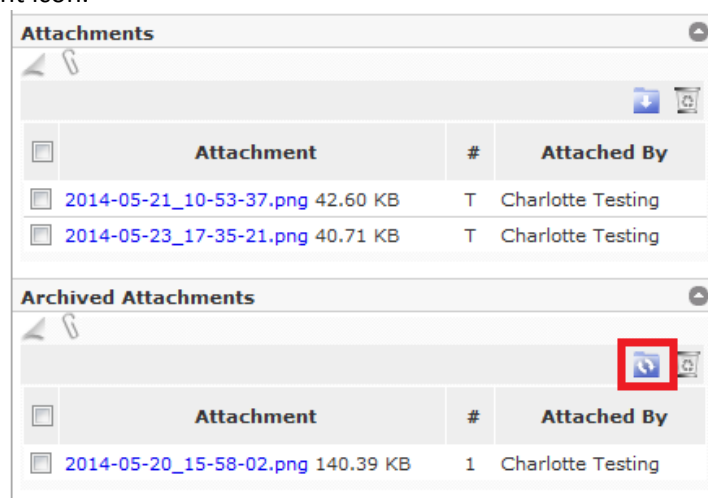
4. Update History List – all updates or changes made in the recruitment item details are recorded in the update history list; for example adding or removing users, updating field values, attaching and removing files. To view, click the Update History List link located before the attachments.

5. Approval Status – list of approvers for the selected product in the change request details. Approvers are defined through Data Maintenance module by the System Administrator.

Approval Status		
✔	Charlotte Testing (Chairman)	✔ ✖
	Mary Williams (COO - Chief Operating Officer)	✔ ✖

a. If you're the approver, you will see the list with enabled approval buttons.
b. Simply click on the button either "Approve" or "Reject". Your decision can be changed depending on the option set by the system administrator.

5.2. Comments Column

The Comment column includes two tabs:
1. Comment Tab
   a. Shows all comments posted for the recruitment item.

   b. You can Add a Comment or Quote a comment.

2. Related Topics
   You can link items that relate to the recruitment through the Topics tab.
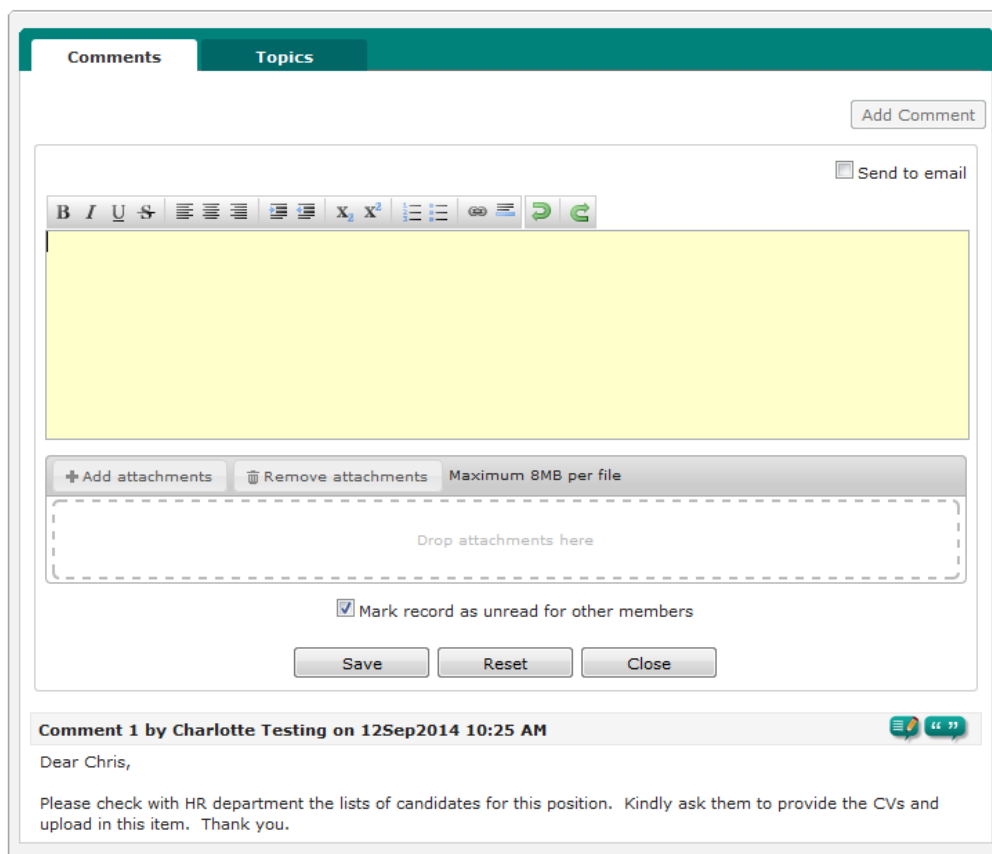
5.3. Access Rights Tab
All users that have access to the recruitment item are listed. Click the tab to show the names.
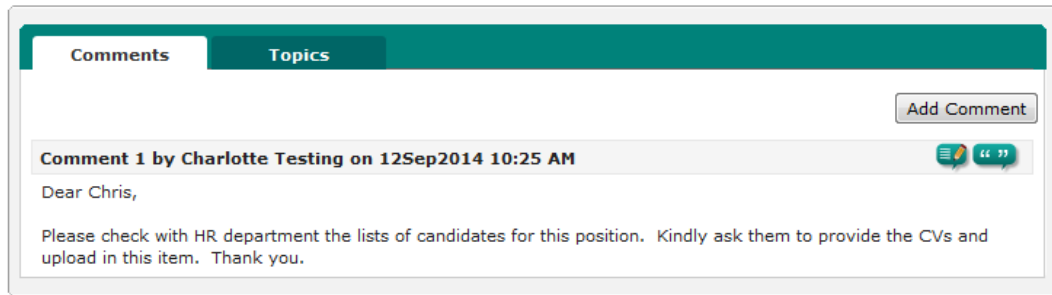
6. How can I add or quote a comment?

If you have questions or there is something you want to discuss about the recruitment, you can add or quote a comment in a recruitment item.

6.1. Add a comment

1. In the comment column you can see the "Add Comment" button. Clicking the button will open a comment box.
2. You can use the available editor to enter your comment.
3. You can also send your comment to other users by checking the option to send to email.
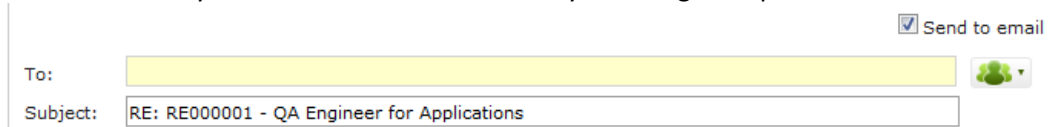
   a. You can type and search the name of the users you want to include as recipient. By default the recruitment topic members are shown in the selection upon clicking the recipient box.
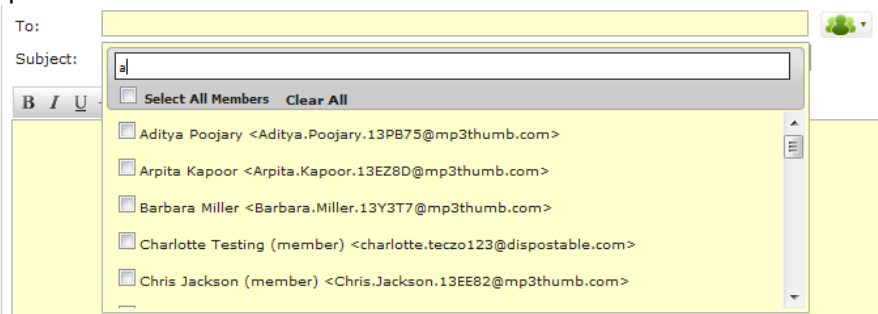

   b. By default the recruitment title is the subject. You can change the subject anytime.
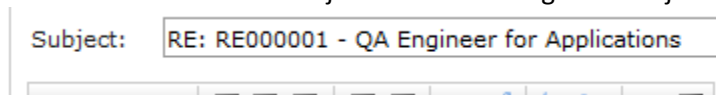
   c. Type the comment you want to store and send.
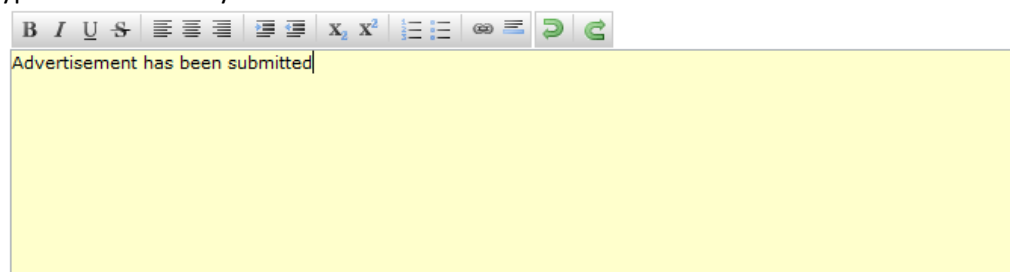
4. You can attach files with the maximum size subscribed by your company. If you're not a moderator or owner, you can only remove the attachments that you've posted. Adding and removing attachments will be recorded in the update history list.
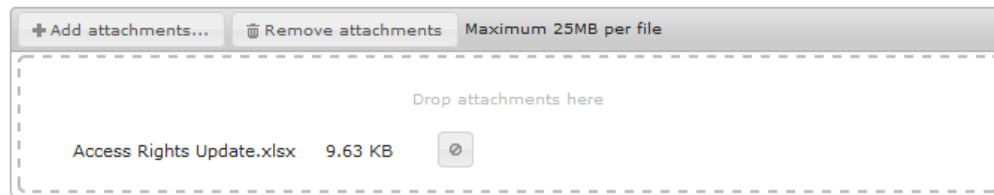

5. You have the option to save the comment and making the recruitment item Read or Unread to other members of the recruitment item by checking or un-checking the option.

6. Saving the comment successfully will show the recruitment depending on the selected option for other members in the summary table. Updated by and updated on will be changed as well.
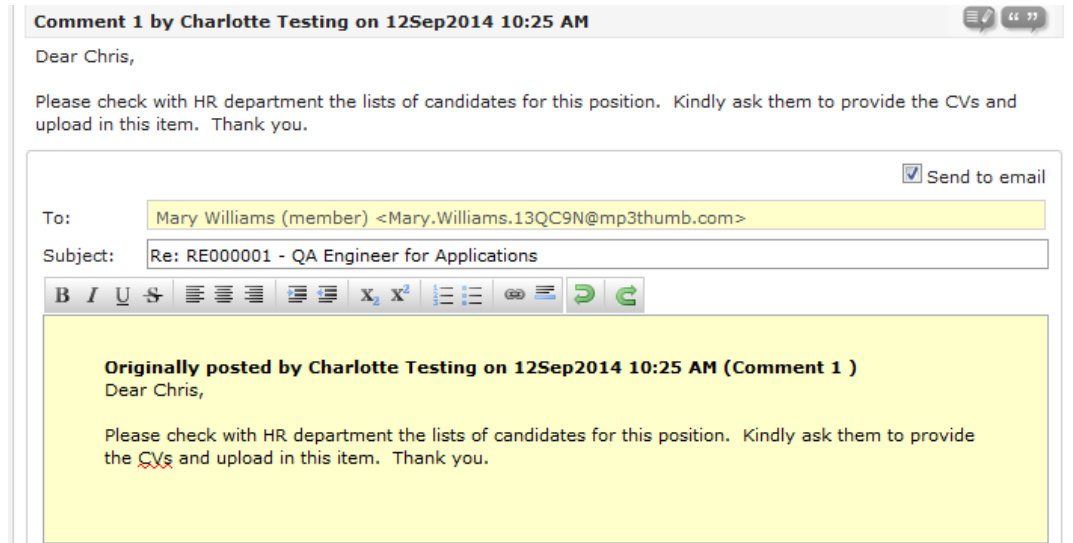
6.2. Quote a comment
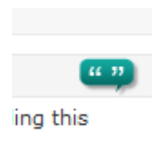
1. You can use this feature to quote a certain comment by clicking the quote icon.

2. The quoted comment will be included in the comment box which you can change before clicking Save.
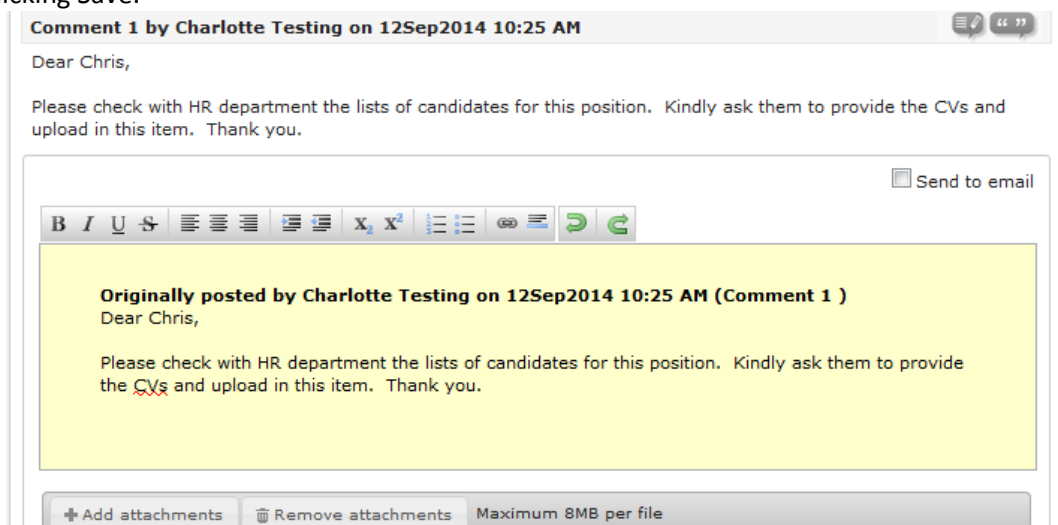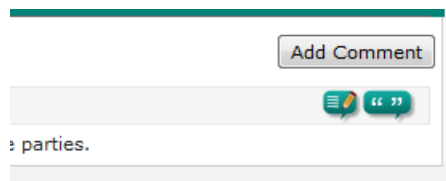

3. You can also send the quoted comment to email by checking the option Send to email.

4. Upon saving successfully, it will be posted as a new comment for the item and the summary table will be updated just like when adding a comment.

6.3.   Edit a Comment

1. You can use this feature to edit a certain comment by clicking the edit icon beside the quote icon. It is only possible to edit the last posted comment on the topic and provided that you are the last user that posted it.

2. You have the option to send the comment to email as well, just like adding a new comment.
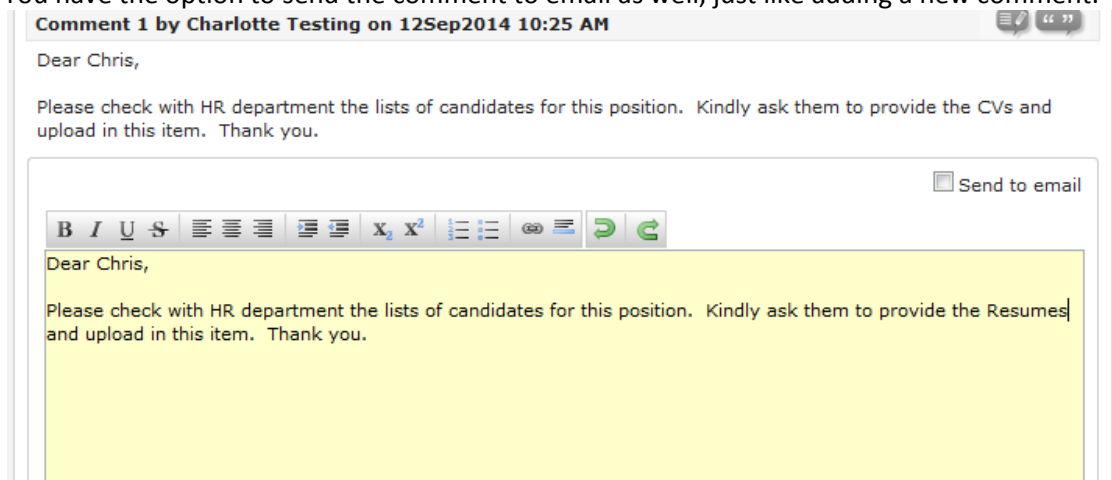
7. How can I edit a recruitment item?

Users with edit rights to the recruitment module, Owner, Moderators and Module Administrators, are the only ones allowed to edit. If you're one of those, you can see an edit button through the header of the record details column.

1. Clicking the "Edit" button will direct you to the Edit page. The fields are the same as the Add page.
2. On the Edit page, the State field is already enabled. You can move your recruitment to On-Hold, Closed or Archived state. Choosing Closed will prompt you to enter closing remarks. Upon saving, the closing remarks will be posted as a new comment on the details page.
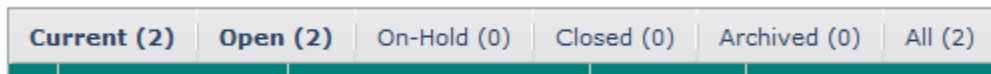
8. What is the State Bar?

The State Bar is located below the Search feature on the summary page and consists of the following: State Headers, Actions Dropdown and Add Recruitment button.

| Current (2) | Open (2) | On-Hold (0) | Closed (0) | Archived (0) | All (2) | Action ▾ | | Add Job Position |

8.1. State Headers

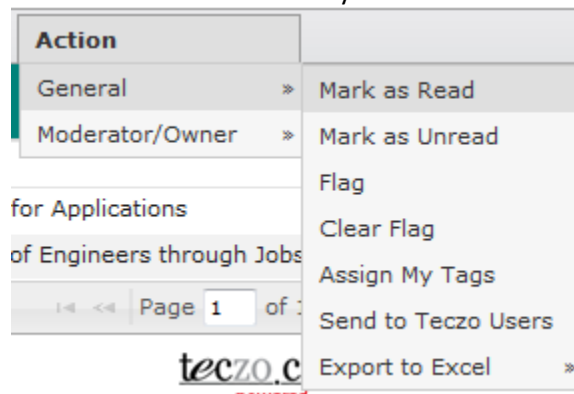| Current (2) | Open (2) | On-Hold (0) | Closed (0) | Archived (0) | All (2) |

1. Recruitment items are grouped into different states such as Open, On-Hold, Closed, Archived and All. You can click the state headers to filter the items in the summary table aside from filtering through Advanced Search.
2. Number beside the state name reflects the following:
   a. Current (#) – number of items currently displayed or filtered in the summary list.
   b. Open (#) – number of items with Open state.
   c. On-Hold (#) – number of items with On-Hold state.
   d. Closed (#) – number of items with Closed state.
   e. Archived (#) – number of items moved to Archived state.
   f. All (#) – number of all items in different states, i.e. Open, On-Hold, Closed and Archived. Clicking "All" tab will show all recruitment items separated per state in the summary list.
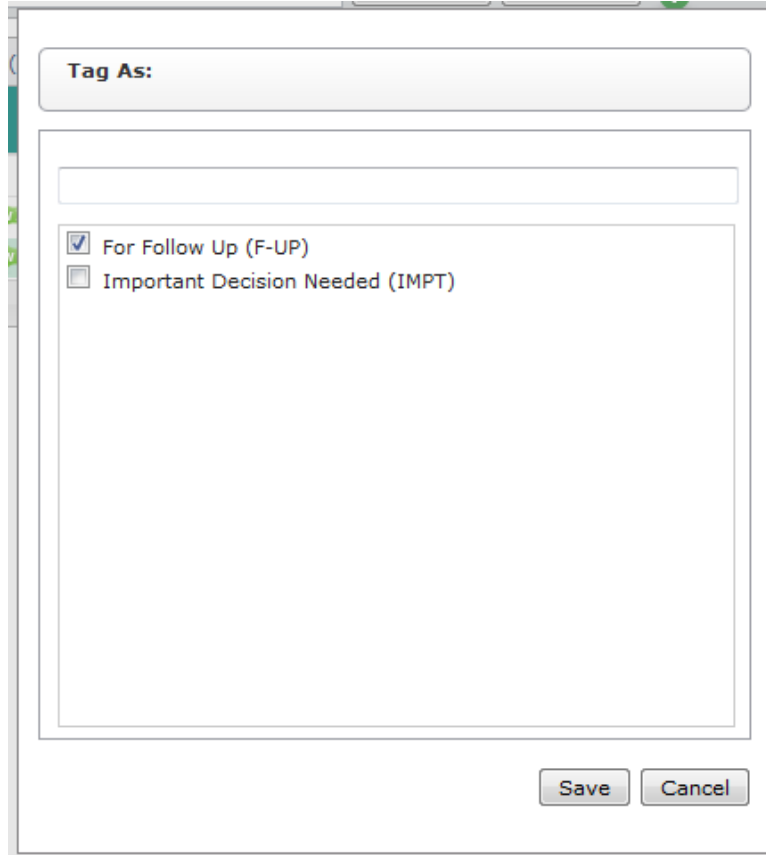
8.2. Action Dropdown

Provides a dropdown list of different actions that can be applied to selected module items. Select one or more recruitments from the list by checking the box in the first column of the summary table then select the desired action.

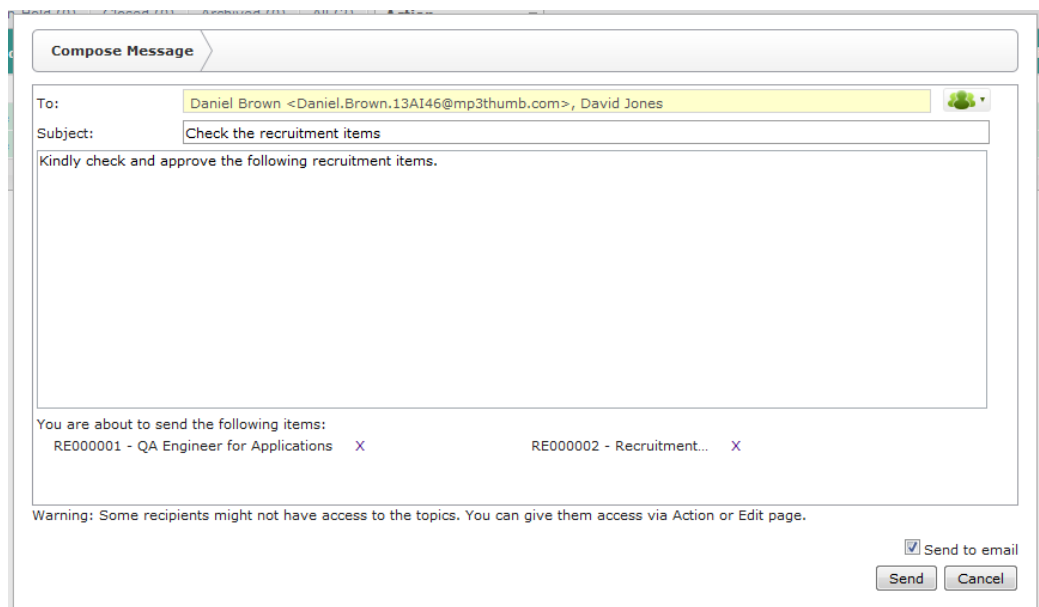1. General - can be applied to all recruitment items you have access to

Action		
General	»	Mark as Read
Moderator/Owner	»	Mark as Unread
		Flag
for Applications		Clear Flag
of Engineers through Jobs		Assign My Tags
◄ ◄◄ Page 1 of		Send to Teczo Users
teczo.c		Export to Excel »

   a. Mark As Read – recruitment items marked as Read will have the rows not displayed in bold.
   b. Mark as Unread – recruitment items marked as Unread will have the rows displayed in bold.
   c. Flag – flagged recruitment items will have the rows displayed in red. This action helps to remind users of important items they need to follow up on.
   d. Clear Flag – non-flagged recruitment items have the rows displayed in black. Choosing this action reverts the status of items from flagged to non-flagged.

e. Assign My Tags – you can assign your personal tags to recruitment items. You can define personal tags through My Account.


f. Send to Teczo Users – you can send one or more recruitments to other users in their messaging box and email.

- Select the Send to Teczo Users link in the dropdown selection.

- Select users though type and search functionality, enter a subject and compose your message.
- The message will automatically be sent to their messaging box which includes the links of the recruitments you've selected.
- If you check the Send to Email checkbox, the message will also be sent to the recipient's email.
- Click "Send" button to send the message.
  Note that in the event that one or more of the recipients do not have access to the recruitments linked to the message, they will be prompted with an "Access Denied" message upon clicking the recruitment link.

g. Export to Excel – you may use export to excel if you need to have copies of the recruitment items you have access to. Simply select the Export to Excel link in the Action dropdown selection. You have the following options to export to excel:

- Export All – export all recruitment items you have access to including their details.
- Export Selected – exports all the recruitment items checked in summary page including their details.

2. Moderator/Owner – actions that can be used by the Moderator, Owner or Module Administrator.
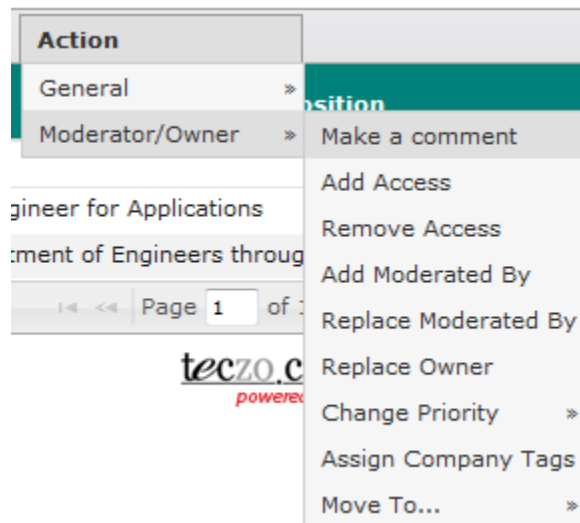
a. Make a comment – allows you to make a comment to one or more recruitment items.

- You will receive a prompt showing the list of items to which you have edit rights, Step 1 - Notice.
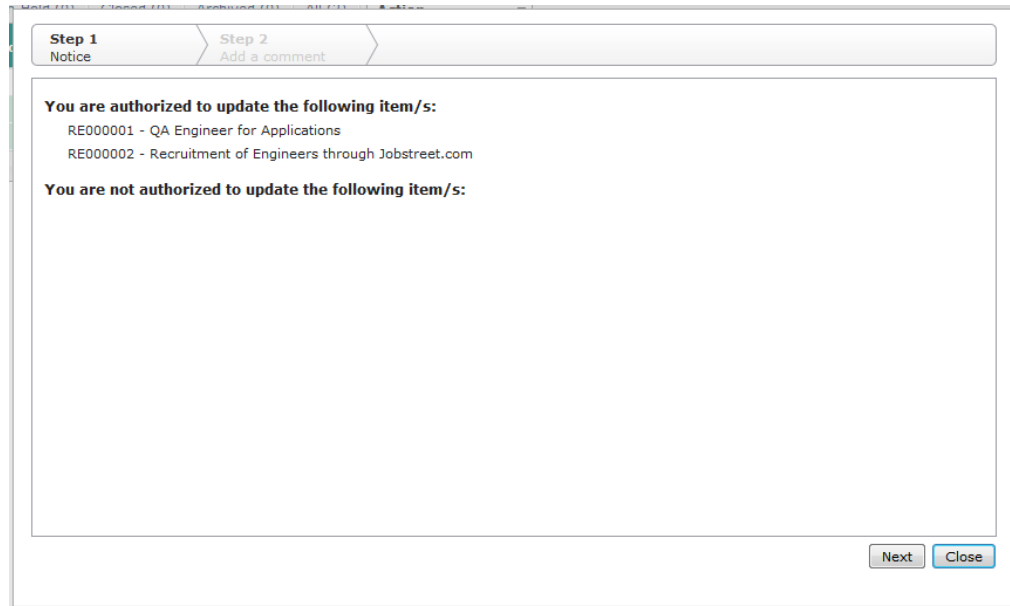
- After clicking the "Next" button, you will be directed to the Step 2 – Add a comment where you can compose your message.
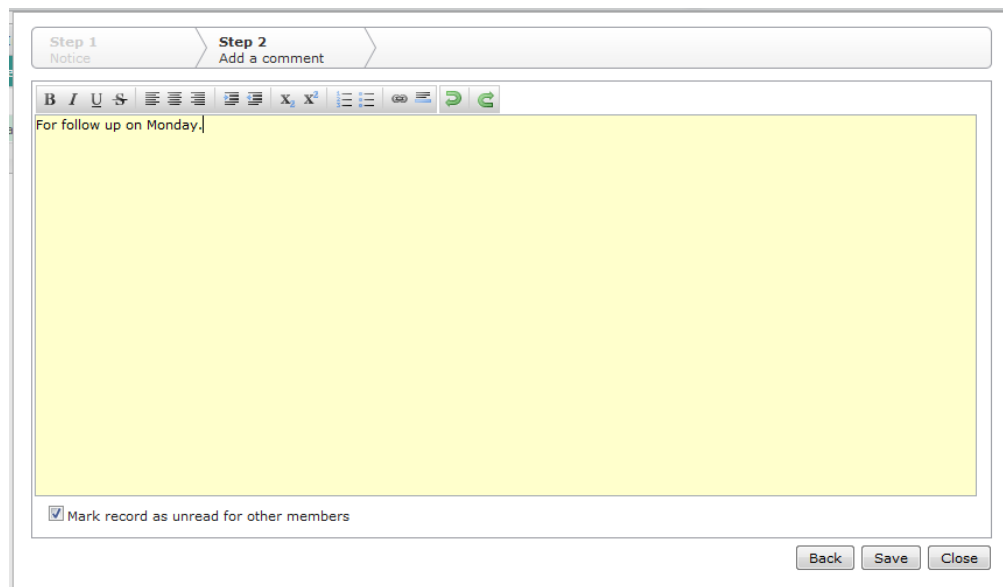
- You have the option to mark the record as unread for other members. Enabling this will make the record unread or bold of other members of the selected recruitment items in their summary table of the recruitment module upon saving.
- Click "Save" to post the comment, "Back" to return to Step 1 – Notice, "Close" to return to the RE summary table without posting your comment.

b. Add or Remove Access – allows you to add or remove access rights to one or more recruitment items.

- Upon selecting the item/s, you can choose to either Add or Remove Access to such items.

| Add Access |
| Remove Access |
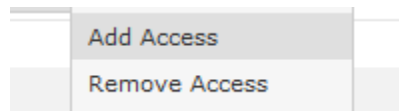
- Upon clicking either the Add or Remove Access from the dropdown list, you will receive a prompt showing the list of items to which you have edit rights. Step 1 – Notice.

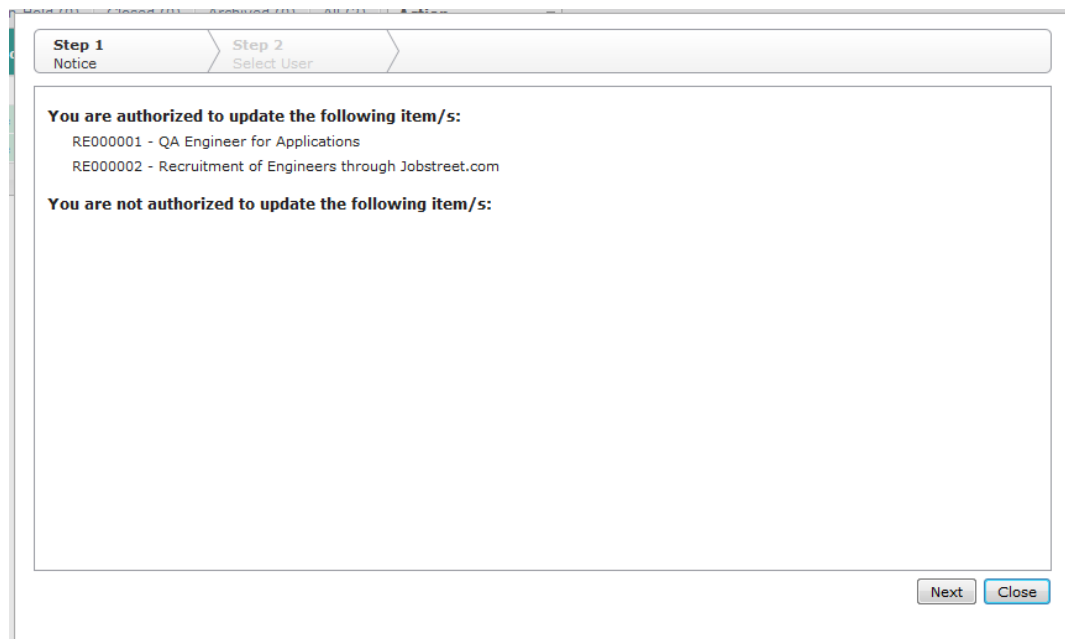| Step 1 Notice	Step 2 Select User	

You are authorized to update the following item/s:
RE000001 - QA Engineer for Applications
RE000002 - Recruitment of Engineers through Jobstreet.com

You are not authorized to update the following item/s:

Next Close

- After clicking the "Next" button, you will be provided with a list of all users with access to the RE module. The list of all users appears on the left side, while the list of selected users appears on the right side. You can choose to add or remove access for one or more users. You can also click the name of the selected users in the right side to remove them from the list of users to be given or denied access. You can filter the list by typing characters in the search box.

Recruitment Module Quick Guide
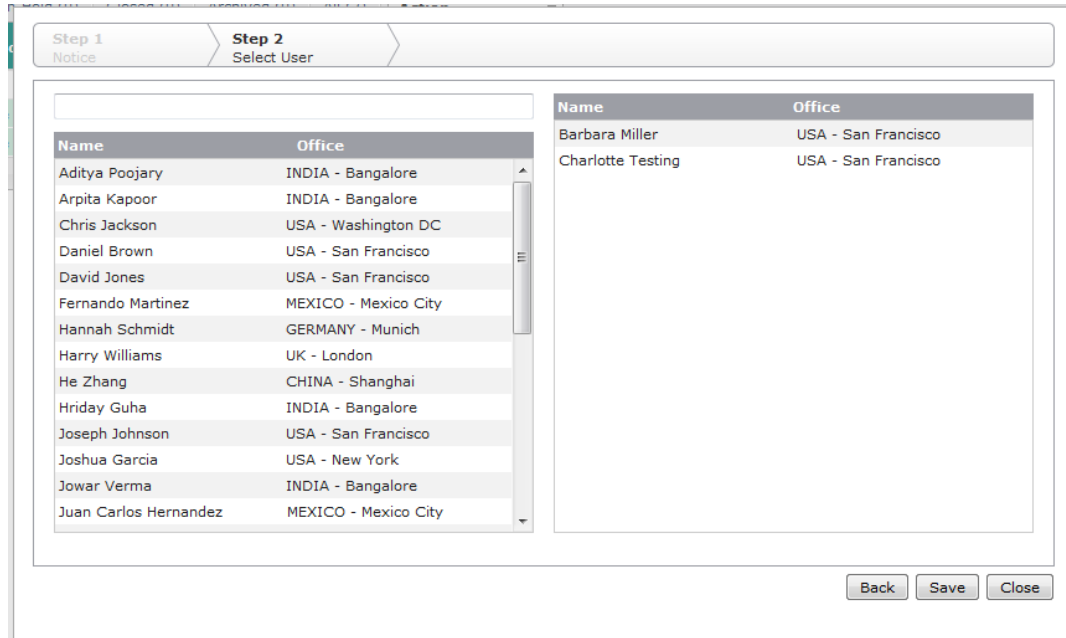
- Click "Save" to add or remove access of the selected users, "Back" to return to Step 1 – Notice, or "Close" to return to the summary table without making any change.

c. Change Assigned Fields – instead of opening the edit page of each item, you can use this action which enables you to change the following:
- Add Moderated By – add one or more moderators to the selected recruitment items.
- Replace Moderated By – replace the moderators of the selected recruitment items.

d. Change Priority – you can change the priority of one or more recruitment items. Available values depend on the specified values in DM module.
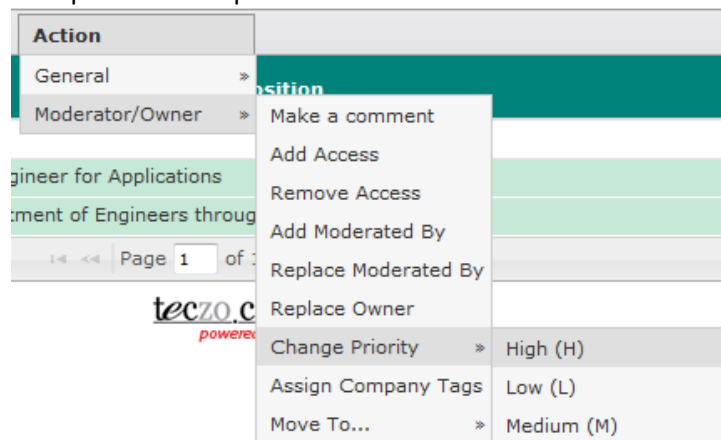
e. Assign Company Tags – you can assign company tags to one or more recruitment items. Company tags are defined by the system administrator.

f. Move To… – This allows users to easily move one or more recruitments to other states, either Active, Inactive, Closed or Archived. Choosing the Closed state will prompt you to enter closing remarks.

Tip: Provide generic remarks or comments if you're selecting more than one item.

8.3. Add Recruitment button

This is the link where you can add a recruitment item or job position. If you don't see this button, it means you don't have Add rights to the module. You may contact the System Administrator in order to get Add / Edit rights to the RE module.
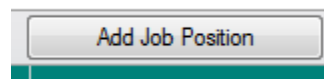

9. How can I filter the list of recruitment items?

The Search/ Filter bar is where you can search certain keywords or use certain fields to filter the list in the summary table. It consist of two parts: Basic Search and Advanced Search

9.1. Basic Search

1. Direct Search – you can enter the RE ID of a certain recruitment item and see its details right away. Pressing Enter or Clicking the "Go" button will filter the list.

2. Quick Search – you can enter keywords in the search box and click the "Search" button to filter the summary list. This functionality searches basic fields such as ID, Job Position or Title, Description and Keywords. By default, it only searches the recruitment items in the Open state. You can return the summary list to its default view by clicking the "Reset" button.
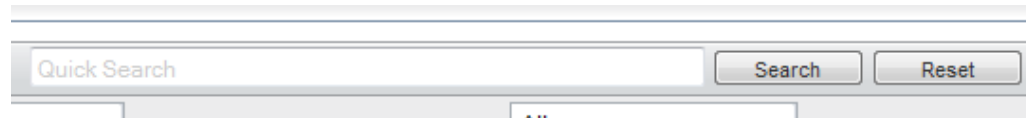
9.2.   Advanced Search

1. You can refine your search through the Advanced Search. The list can be filtered using different fields such as State, Department, Recruitment Status, Priority, Status, Person, Recruitment Type, Office, Date, My Tag and Company Tag. Click the Advanced Search link in the top right side of the of the Basic Search row to see the available fields.
2. Simply select the desired field values and click the "Search" button. You are allowed to select multiple values per field.
3. You can return the summary list to its default values by clicking the "Reset" button.
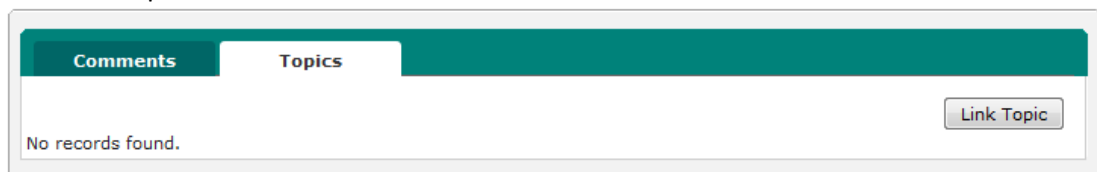

10. How to link topics to the recruitment item?

Users with edit rights to a recruitment item (Owner, Moderator or Module Administrator) can link one or more related topics to that recruitment item.

10.1.   Link topics from other modules

1. Go to the Topics tab in the comment column.

2. Click the "Link Topic" button to open the modal page which shows different steps in linking the topic.
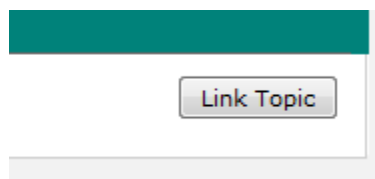
3. In Step 1 – Select Module modal page, select a module where the related topic is located. You will see all modules that you have right to access.
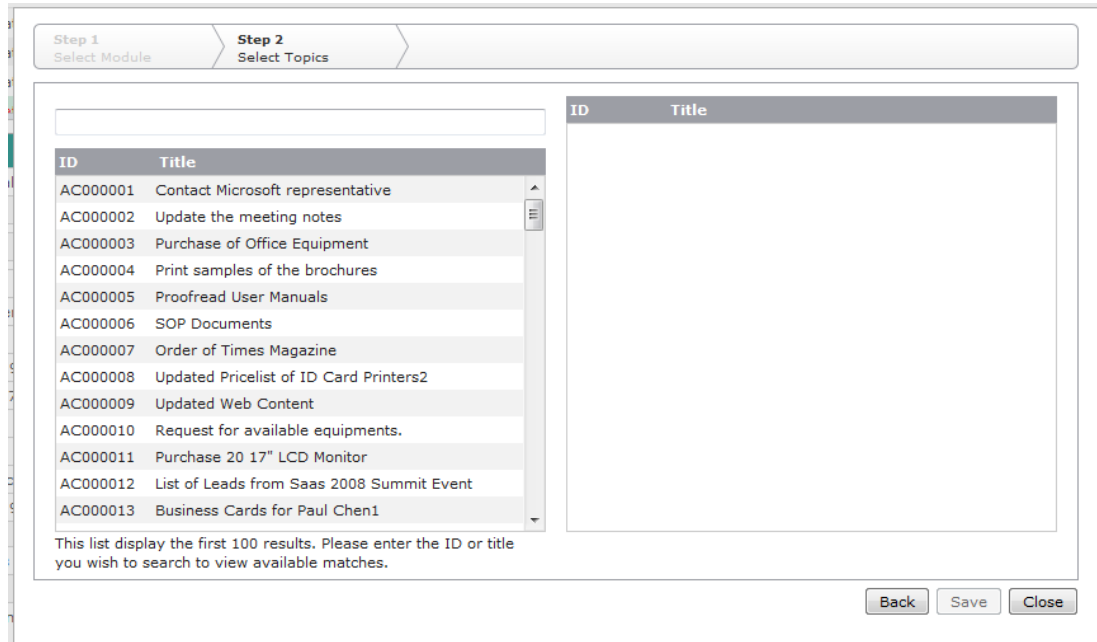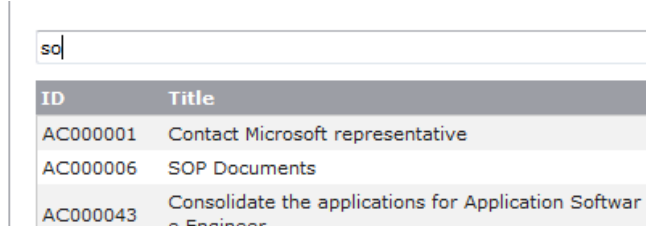

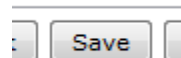4. Click the "Next" button to go to the next step.
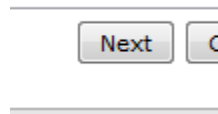
5. In Step 2 – Select Topics modal page, select the related topics from the left table selection. All the topics you have access to in the selected module will be available.
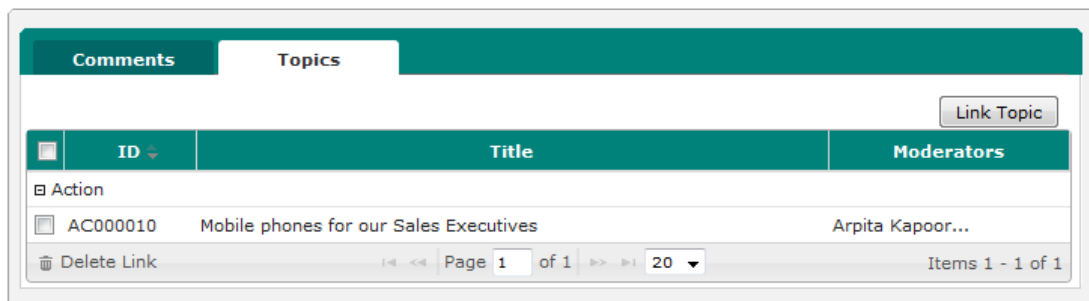
You can use the type and search functionality to filter the list.
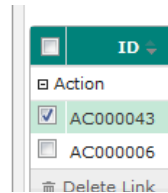

6. Click the "Save" button to link the topics.

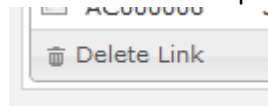7. Related topics will now be displayed in the tab's summary table.
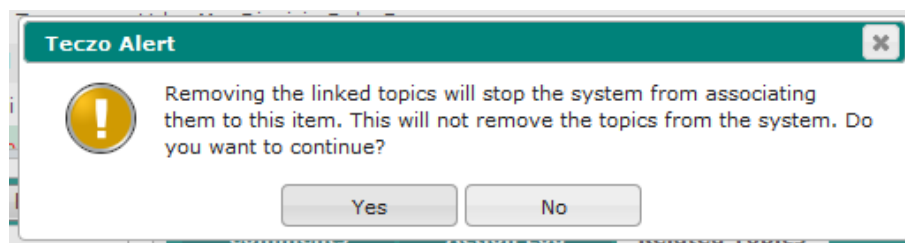
10.2. Removing linked topics

1. Select one or more related topics to be removed by checking the box in the first column of the row.

2. Click the "Delete Link" button on the leftmost bottom part of the table.

3. Confirm the action by clicking the "Yes" button in the alert message.

11. What are the record indicators in the summary table?

Notification icons or indicators are designed so that individual users can quickly see what the record updates are. For example, if I am not interested in any access rights changes of a certain recruitment item, I can just ignore it. Similarly, if I am interested in people's comments, I can choose to view recruitment items where there have been new comments added.

When an item is updated, you will see Notification Icon(s) displayed in the Recruitment title column.

Definitions of the Notifications Icons

Icon	Meaning	Icon disappears
	The item is marked as sticky. The topic will be shown in the first row regardless of what sorting has been applied by the user.	When the item has been removed as sticky by the module administrator
	The recruitment item has one or more attachments	When all attachments have been removed
	This is a newly created recruitment item	3 days after the recruitment was created
	Changes have been made to the details of this recruitment item	When you view the recruitment details
	Comments have been added to this recruitment item The number indicates how many new comments were added since you last accessed the recruitment item	When you view the recruitment details
	Access rights have been changed for this recruitment item	When you view the recruitment details
	You have been added to the recruitment item	When you view the recruitment details

12. Who are the module users?

User Type	Rights to Item
Owner	• User who needs to work on the recruitment item • Can edit the recruitment item, i.e. Add/Remove Access, Edit Details, Close the recruitment • One per recruitment item • Can comment to the recruitment item • Can attach files
Moderator	• Assigned to moderate the recruitment item • Can edit the recruitment item, i.e. Add/Remove Access, Edit Details, Close the recruitment • One or more users • Can comment to the recruitment item • Can attach files
Item Member (usually called Topic Member)	• Can view the recruitment item details • Can comment to the recruitment item • Can attach files
Initiator	• User who initiates the recruitment item • Can comment to the recruitment item • Can attach files • Can be removed as item member
Submitter	• User who submitted the recruitment item • Can comment to the recruitment item • Can attach files • Can be removed as item member
Module Administrator	• Can access all recruitment items in the RE module • Can edit all recruitment items in the RE Module • Can comment to all recruitment items in the RE module • Can attach files