

Simply Personnel

Getting Started with Recruitment Manager

About This Document

This document provides an overview on how to get started with Recruitment Manager.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk you will find comprehensive articles and an option to open a support ticket.

Thank you
The Simply Personnel Team

Introduction

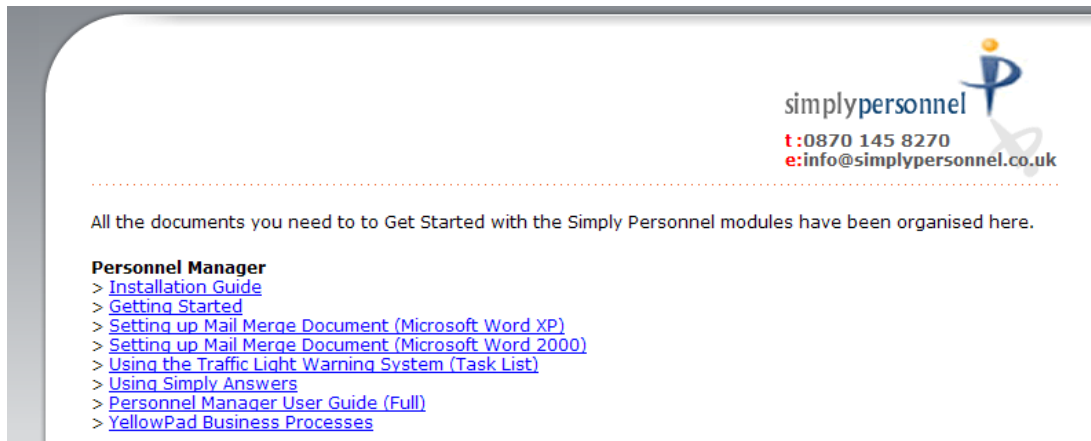
This document should be used after Recruitment Manager has been installed. If you have not yet installed Recruitment Manager then please refer to the installation guide you received with Recruitment Manager or contact the helpdesk.

Use the web page below to get access to documents/articles referenced in this document:

The Getting Started Resource Page on the Web

Use the web page below to get access to documents/articles referenced in this document:

<http://www.simplypersonnel.co.uk/gettingstartedresources.htm>



The screenshot shows a web page with the Simply Personnel logo in the top right corner. The logo includes the text 'simplypersonnel' and a stylized 'P' icon. Below the logo, the contact information is listed: 't:0870 145 8270' and 'e:info@simplypersonnel.co.uk'. A horizontal dotted line separates the contact information from the main content. The main content begins with the text: 'All the documents you need to to Get Started with the Simply Personnel modules have been organised here.' Below this text, there is a section titled 'Personnel Manager' followed by a list of links: '> Installation Guide', '> Getting Started', '> Setting up Mail Merge Document (Microsoft Word XP)', '> Setting up Mail Merge Document (Microsoft Word 2000)', '> Using the Traffic Light Warning System (Task List)', '> Using Simply Answers', '> Personnel Manager User Guide (Full)', and '> YellowPad Business Processes'.

The Steps

These steps are designed to get you started using Recruitment Manager quickly:

Tick when complete	Task	How?	Estimated Time
<input type="checkbox"/>	Set-up drop-downs (Mandatory)	Using the Recruitment > System set up option on the main dashboard	15 minutes
<input type="checkbox"/>	Set-up the recruitment workflow process	Using the Recruitment > System set up option on the main dashboard	2-4 hours
<input type="checkbox"/>	Set-up the standard documents	Using the System set up option on the main dashboard	5 minutes/ document

You can now continue with the additional set-up if required:

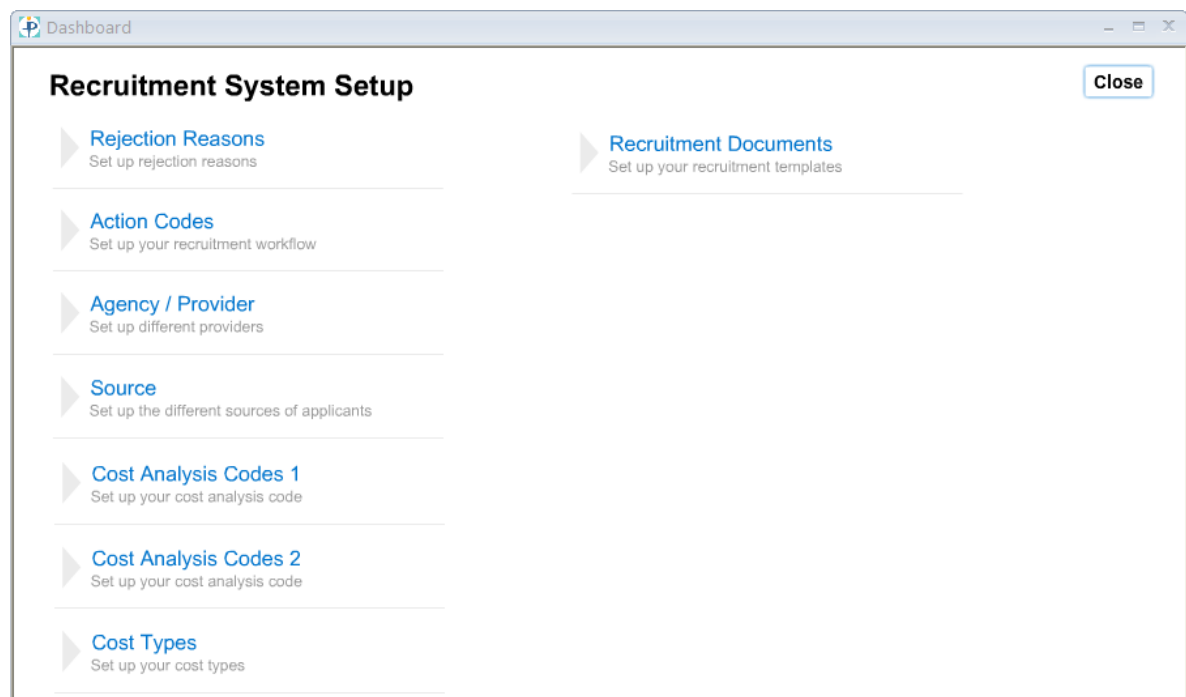
Tick when complete	Task	How?	Estimated Time
<input type="checkbox"/>	Create a new vacancy	Using the Dashboard	5 minutes
<input type="checkbox"/>	Add applicants to a vacancy	Using the Dashboard	2 minutes/ applicant
<input type="checkbox"/>	Learn how to use the main areas of the system	Manuals, Knowledge base	1 hours
<input type="checkbox"/>	Learn how to get more help	Helpdesk	10 minutes

Adding Your Data using the System Set-up Options

Recruitment Manager uses the system set-up option almost on every screen, this makes sure you enter the correct information and also saves time.



All the system set-up options are accessed via the Recruitment > System set-up option on the main dash board and then by choosing the relevant sub-category within that option.



The Following should be set up first:

<input checked="" type="checkbox"/>	Set-up the rejection reasons, these will typically be “Insufficient Experience”, “Did not Attend Interview”, etc
<input type="checkbox"/>	Set-up the Source codes. These are the source from where you will get applicants from, i.e. Newspaper, Internet, Telephone, etc
<input type="checkbox"/>	Set-up the advertising providers if you have any.
<input type="checkbox"/>	Set-up the Cost Types and analysis codes. The costs spent –

	Vacancy costs applicant costs etc.
<input type="checkbox"/>	Posts – System Setup > Company Rules > Posts. Enter the posts (which is the title of the job, i.e. Receptionist, Sales Consultant). Enter 999 into the positions if you are not going to specify the maximum number of people allowed in this role.

Setting-Up The Recruitment Workflow Process

The most significant part of the Recruitment Manager set-up is the Action maintenance. The Action maintenance defines the requirement workflow or the steps you take when dealing with an applicant.

To help you understand the approach that needs to be taken we are going to map out a typical recruitment process and map this into the system, step by step. We suggest you follow this as a starting point – if required you can delete this process and then map your own in – using the instructions here as a reference point.

We need to map out the recruitment process, the easiest way is to draw this out, here is a typical process that could be used by most organisations:



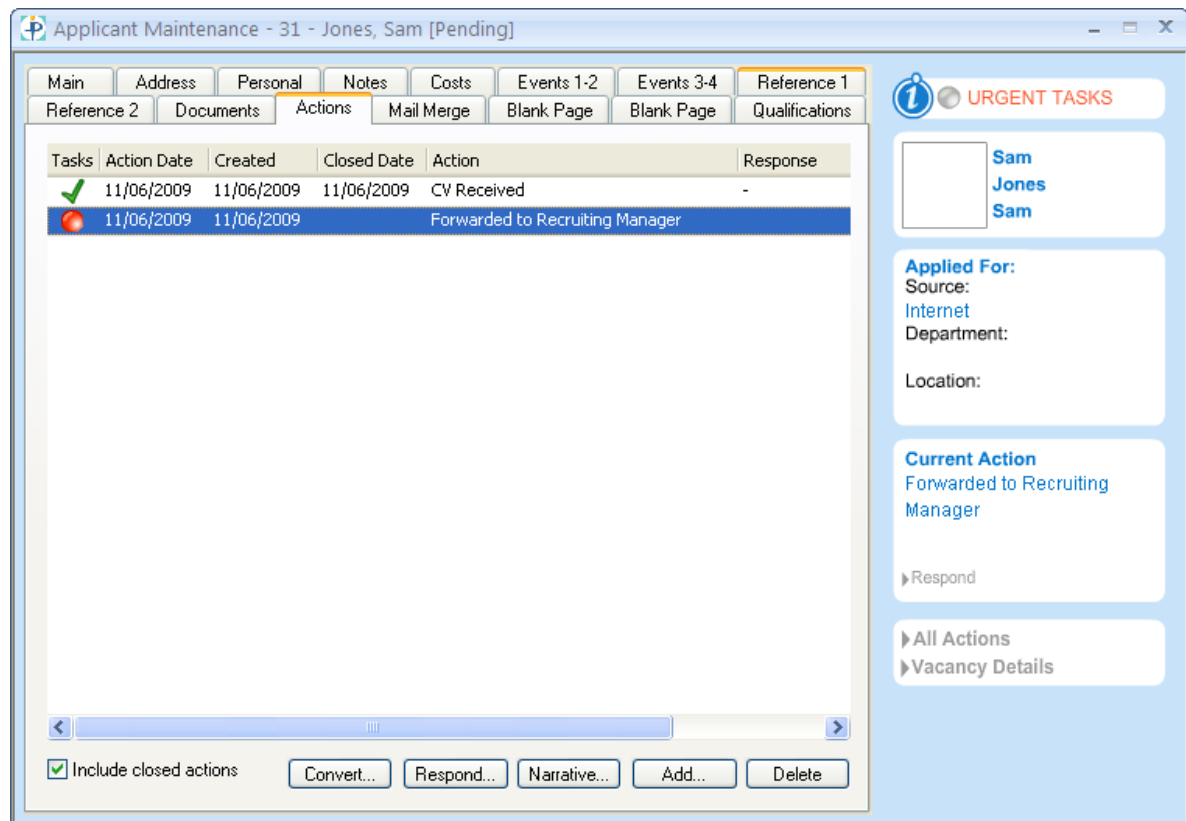
The process above starts with an action called CV Received. An action is then created called forward to Recruiting Manager at this stage a letter is also automatically created (to be printed later).

Then there are three potential responses that can be used, CV Possible, CV Suitable, CV Unsuitable, these in turn create the actions; on hold, invite to first interview and reject letter sent.

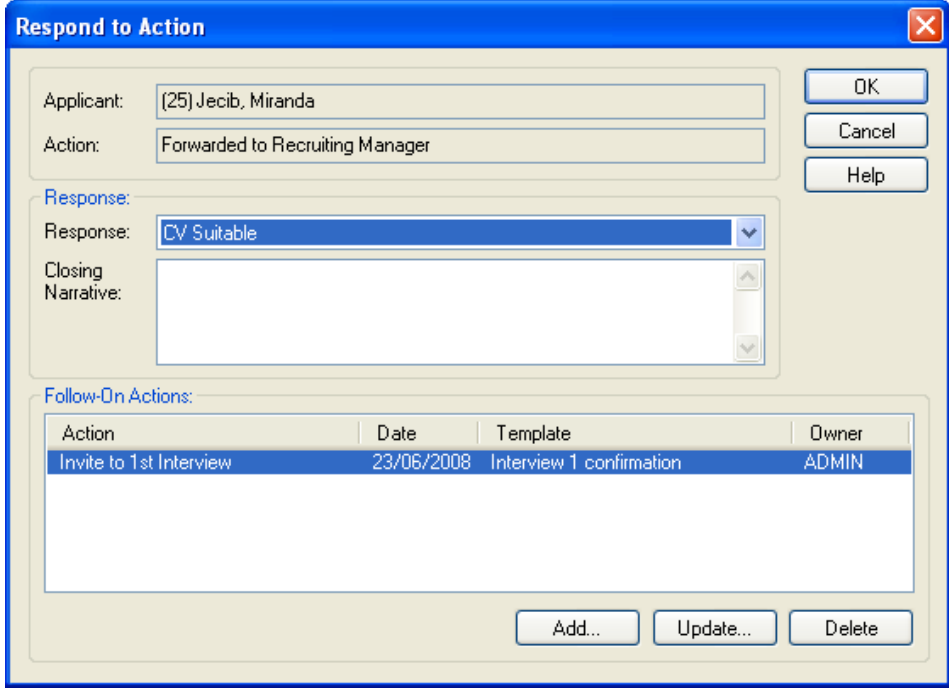
The process is then continued using the Action->Response approach. When an applicant is being processed then actions will be shown as things that need to be done and the response will be the possible responses to that action.

For example the action Forward to Recruiting Manager is telling you to forward the applicants details to the recruitment manager, when this is done you confirm it and select one of the three possible responses. The screen below is from the applicant processing area of the system – it is shown so you can see how actions and responses are used once they have been defined.

Firstly you can see when an applicant is added the first action CV Received is shown and the next action, Forwarded to Recruitment Manager is shown.



Highlighting the Forward to Recruiting Manager line and pressing Respond show the following screen:



The dialog box titled "Respond to Action" contains the following fields and controls:

- Applicant:** [25] Jecib, Miranda
- Action:** Forwarded to Recruiting Manager
- Response:** CV Suitable
- Closing Narrative:** (Empty text area)
- Follow-On Actions:**

Action	Date	Template	Owner
Invite to 1st Interview	23/06/2008	Interview 1 confirmation	ADMIN

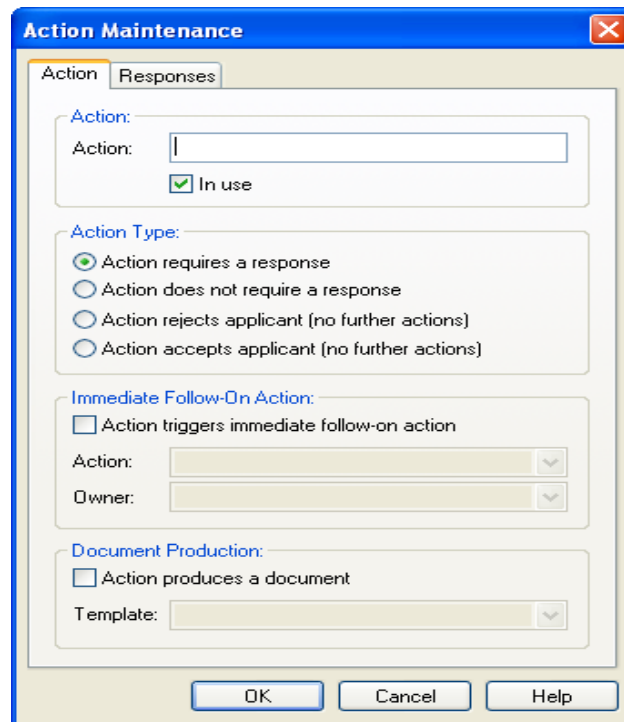
Buttons: OK, Cancel, Help, Add..., Update..., Delete

Depending upon the response you select the appropriate follow-on action will be shown, so on the screen above selecting CV Suitable shows that the follow-on action will be Invite to 1st Interview and that the template Interview 1 confirmation will be used when producing the letter.

To create the recruitment workflow you will use the Dashboard > Recruitment > System setup > Action Codes, then select the add option, the following screen will be shown:

You can see the screen prompts for an Action description. You then select the Action Type, which can be one of four options. You specify if an automatic action should be created when this action is selected. You can specify which document should be created when this action is created.

To provide you with an example of how this works with the flowchart, further on a series of screen shots are shown, which translate the process into a set of actions:



Action Maintenance [X]

Action Responses

Action:

Action:

In use

Action Type:

Action requires a response

Action does not require a response

Action rejects applicant (no further actions)

Action accepts applicant (no further actions)

Immediate Follow-On Action:

Action triggers immediate follow-on action

Action:

Owner:

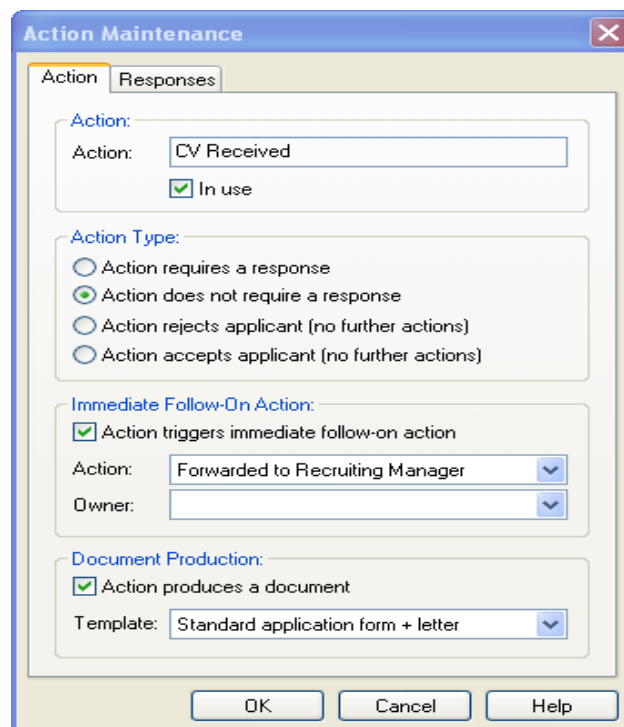
Document Production:

Action produces a document

Template:

OK Cancel Help

1. CV Received



Action Maintenance [X]

Action Responses

Action:

Action: CV Received

In use

Action Type:

Action requires a response

Action does not require a response

Action rejects applicant (no further actions)

Action accepts applicant (no further actions)

Immediate Follow-On Action:

Action triggers immediate follow-on action

Action: Forwarded to Recruiting Manager

Owner:

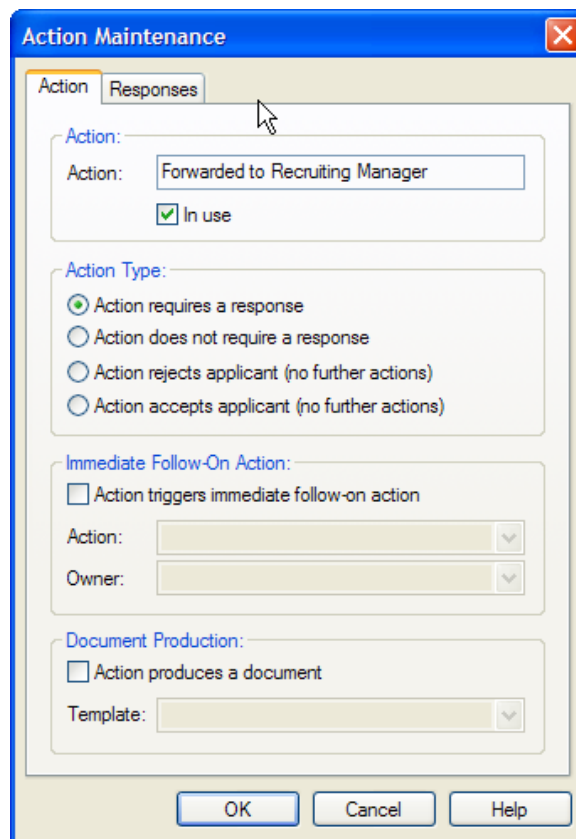
Document Production:

Action produces a document

Template: Standard application form + letter

OK Cancel Help

2. Forward to Recruiting Manager



Action Maintenance

Action Responses

Action: Forwarded to Recruiting Manager
 In use

Action Type:

- Action requires a response
- Action does not require a response
- Action rejects applicant (no further actions)
- Action accepts applicant (no further actions)

Immediate Follow-On Action:

Action triggers immediate follow-on action

Action:

Owner:

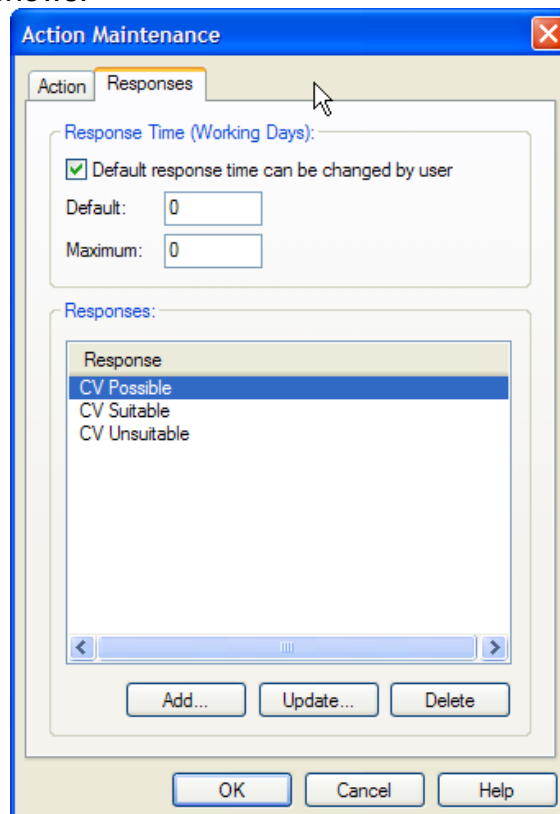
Document Production:

Action produces a document

Template:

OK Cancel Help

The responses tab shows:



Action Maintenance

Action Responses

Response Time (Working Days):

Default response time can be changed by user

Default:

Maximum:

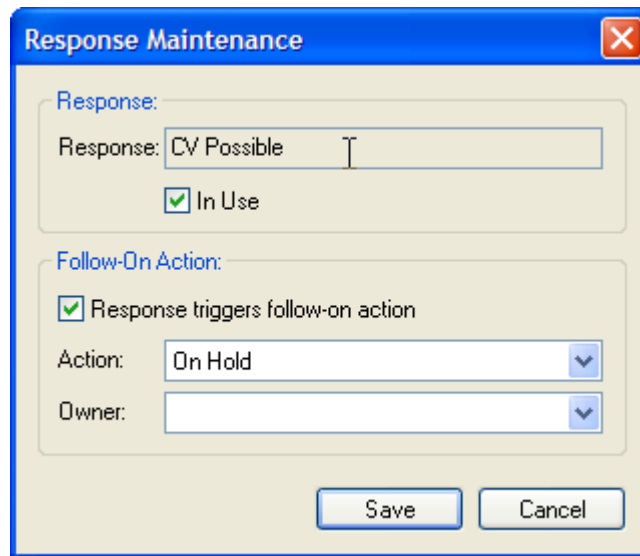
Responses:

Response
CV Possible
CV Suitable
CV Unsuitable

Add... Update... Delete

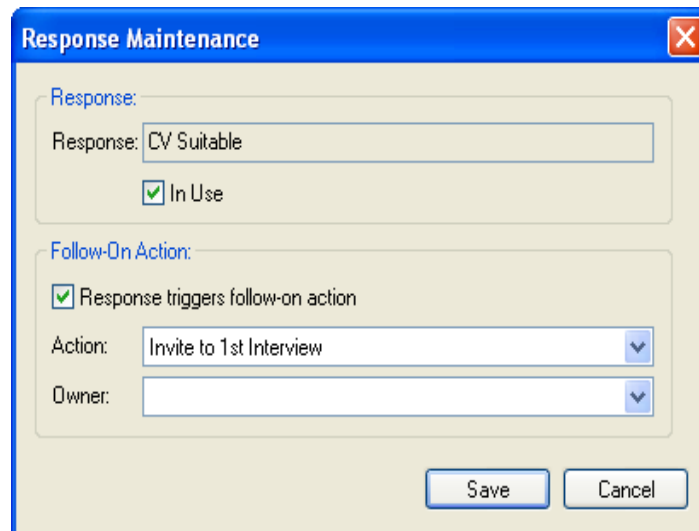
OK Cancel Help

The CV Possible response creates the follow on action On Hold when selected:



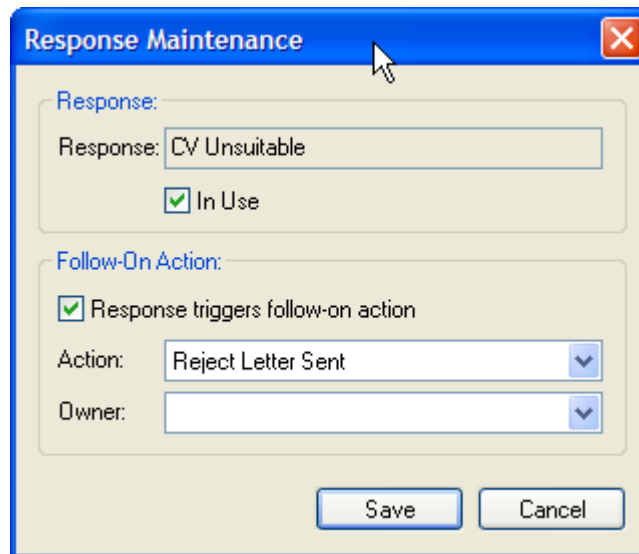
The screenshot shows a 'Response Maintenance' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into two main sections. The first section, titled 'Response:', contains a text input field with 'CV Possible' entered, a checked checkbox labeled 'In Use', and a small vertical bar icon to the right of the input field. The second section, titled 'Follow-On Action:', contains a checked checkbox labeled 'Response triggers follow-on action', a dropdown menu for 'Action' with 'On Hold' selected, and another dropdown menu for 'Owner' which is currently empty. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

The CV Suitable response creates the follow-on action, Invite to 1st Interview when selected:



The screenshot shows a 'Response Maintenance' dialog box with a blue title bar and a close button (X) in the top right corner. The dialog is divided into two main sections. The first section, titled 'Response:', contains a text input field with 'CV Suitable' entered, a checked checkbox labeled 'In Use', and a small vertical bar icon to the right of the input field. The second section, titled 'Follow-On Action:', contains a checked checkbox labeled 'Response triggers follow-on action', a dropdown menu for 'Action' with 'Invite to 1st Interview' selected, and another dropdown menu for 'Owner' which is currently empty. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

The CV Unsuitable response creates the follow-on action, Reject Letter Sent when selected:



How to map your process into the system:

1. Draw out your process. Start with the top Action, decide what the possible Responses are and what Actions those tasks will create and what letter should be created when an action is created.
2. Create the standard document templates you will need.
3. Create all your actions – but always select Action Does Not Require A Response. Once all the actions are created, go back and update the actions and put in the appropriate responses – because trying to do this before all the actions are chosen will be too difficult as you will find yourself wanting to add a response which need an action that you have not yet created.
4. Test your process as you go along.

How to test your process:

1. Create a new vacancy
2. Add an applicant to the vacancy.
3. Work the applicant through the process.
4. Delete the applicant and change your process as required.

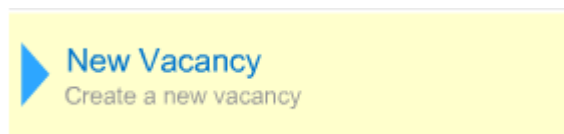
Setting-up standard document templates

Recruitment Manager is fully integrated with Microsoft Office and this will allow you to hold standard documents in the database.

Access detailed instructions on how to do this from the getting started resources web page.

Creating Vacancies

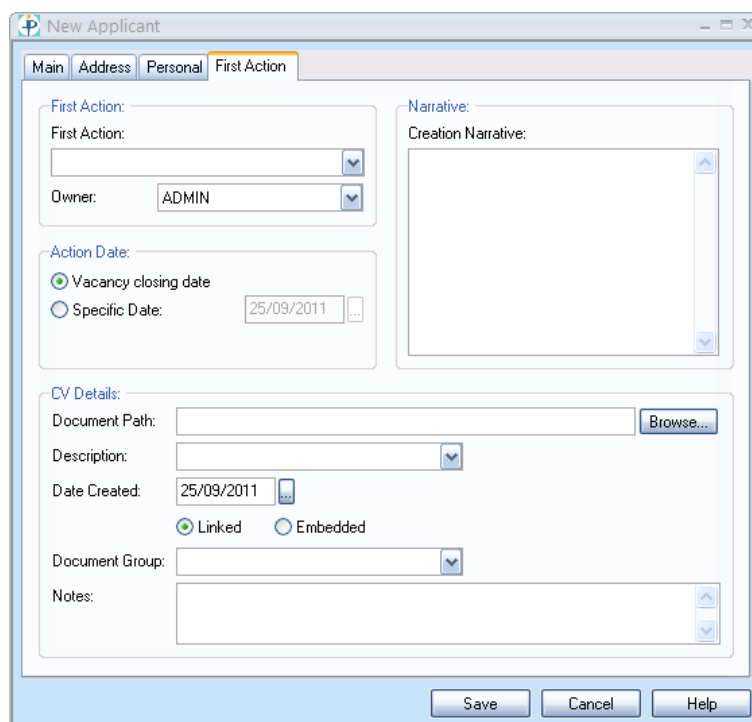
Create a new vacancy by selecting the new vacancy option from the recruitment section on the dashboard and click on create new vacancy:



Enter the basic details.

Creating Applicants and Work them through the Recruitment Workflow Process

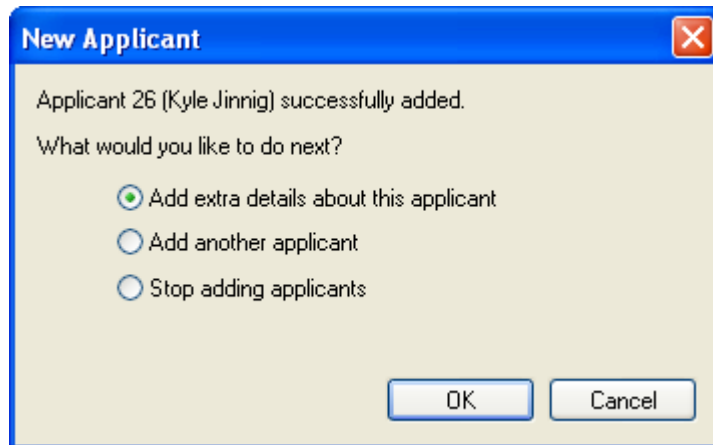
Create a new applicant by selecting the New Applicant button from the recruitment section on the dashboard. Enter the applicant details, when the following screen is presented you can enter the 'first action' from the list of actions set up previously,


 A screenshot of a web application window titled "New Applicant". The window has tabs for "Main", "Address", "Personal", and "First Action", with "First Action" selected. The form contains several sections:

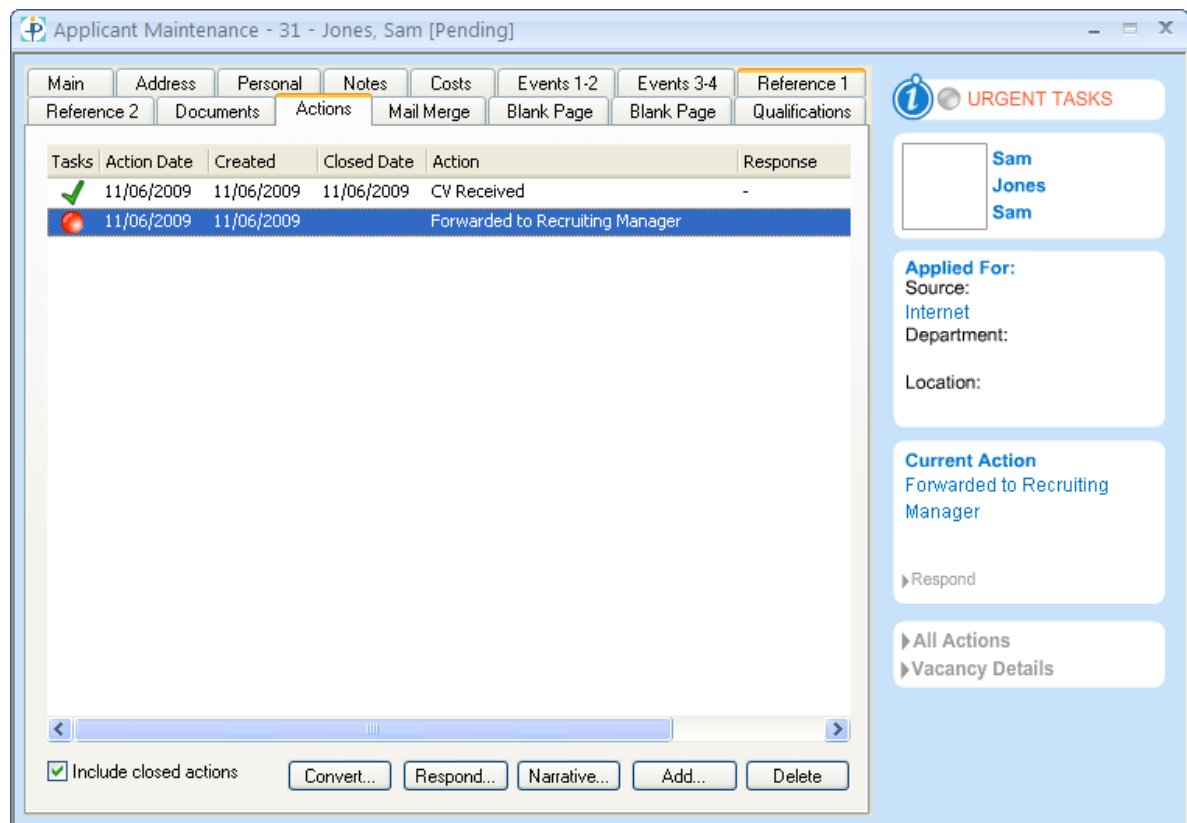
- First Action:** A dropdown menu for "First Action" and a dropdown for "Owner" set to "ADMIN".
- Action Date:** Radio buttons for "Vacancy closing date" (selected) and "Specific Date" (with a date field showing "25/09/2011").
- Narrative:** A large text area for "Creation Narrative".
- CV Details:** A "Document Path" field with a "Browse..." button, a "Description" dropdown, a "Date Created" field (showing "25/09/2011"), radio buttons for "Linked" (selected) and "Embedded", a "Document Group" dropdown, and a "Notes" text area.

 At the bottom of the window are "Save", "Cancel", and "Help" buttons.

The first action will normally be CV Received. When you press the Finish button, select the option to add more details about this applicant:



Then go to the actions tab:



Highlight the open action (see the closed column, no date indicates open) in this case, Forward to Recruiting Manager and click on the Respond button, select the appropriate response and click on OK.

Respond to Action

Applicant: (26) Jinnig, Kyle

Action: Forwarded to Recruiting Manager

Response: CV Suitable

Closing Narrative:

Follow-On Actions:

Action	Date	Template	Owner
Invite to 1st Interview	23/06/2008	Interview 1 confirmation	ADMIN

Buttons: Add... Update... Delete

Buttons: OK, Cancel, Help

Continue to work the applicant through the recruitment process. As the applicant is worked through the process any documents that should be generated will be created and placed on the Mail Merge tab, these can be printed individually or in bulk by using the Documents option on the top toolbar.

Applicant Maintenance - 26 - Surman, James [Pending]

Reference 2 | Documents | **Actions** | Mail Merge | Blank Page | Blank Page | Qualifications

Action Date	Produced	Date Produced	Template
29/07/2009	<input type="checkbox"/>		Standard application form + letter
07/01/2010	<input type="checkbox"/>		Invite to 1st Interview

Include produced letters

Buttons: Produce... Delete...

URGENT TASKS

James Surman James

Applied For:
Source: Internet
Department:
Location:

Current Action
Invite to 1st Interview

Respond

All Actions
Vacancy Details

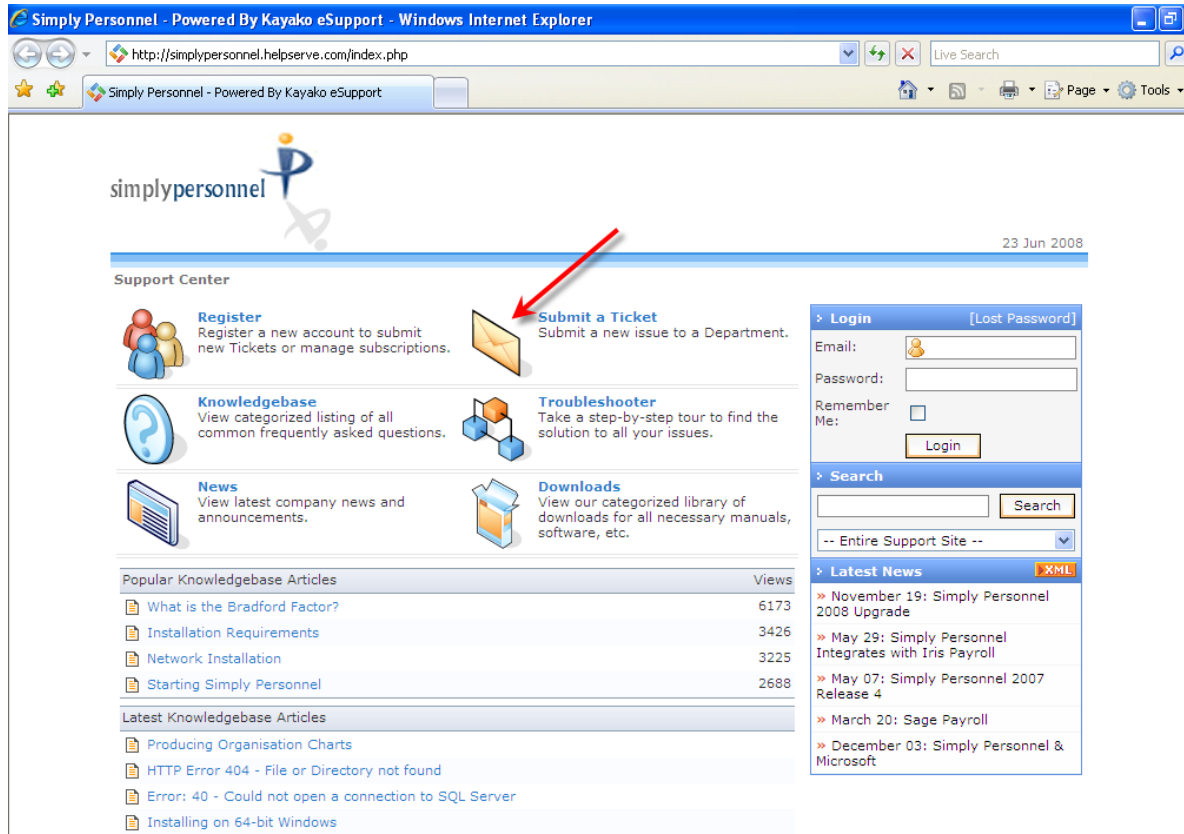
Learn How to Get More Help

You can use the getting started resources page on the website:
<http://www.simplypersonnel.co.uk/gettingstartedresources.htm>

Or use the helpdesk available at <http://www.simplypersonnel.co.uk> and then by selecting the support option on the menu.

You can search the knowledge base, submit a support ticket or look at popular articles.

You can also contact the helpdesk by emailing support@simplypersonnel.co.uk or by phoning 0870 145 8270 and selecting the support option.



Learn How to Use the Main Areas of the System

Recruitment Manager is a comprehensive system that contains significant functionality; the following steps are a suggested on what you should do next and where help is available for those steps:

1. Learn how to streamline the process of adding applicants and working them through the recruitment process. Available in the Recruitment manual.
2. Learn how to use the recruitment diary, this will warn you proactively of tasks and activities and also allow you to plan important dates. Available in the Recruitment manual.
3. Learn how to print documents and letters. Available in the Recruitment manual.
4. Run the reports. Available in the manual and knowledge base.
5. Learn how to use Simply Answers. Available on the getting started resources page on the web and knowledgebase.