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

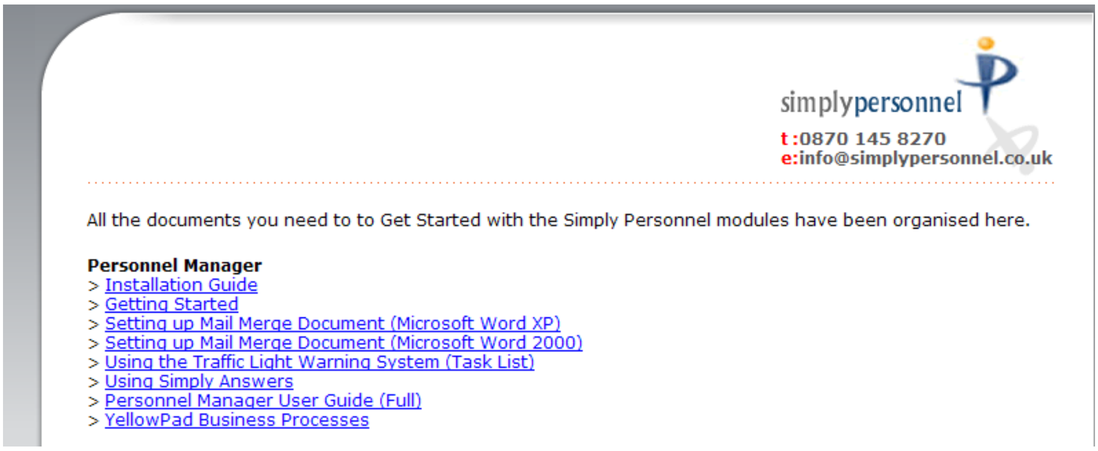
This document should be used after Recruitment Manager has been installed. If you have not yet installed Recruitment Manager then please refer to the installation guide you received with Recruitment Manager or contact the helpdesk.

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 Steps

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

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

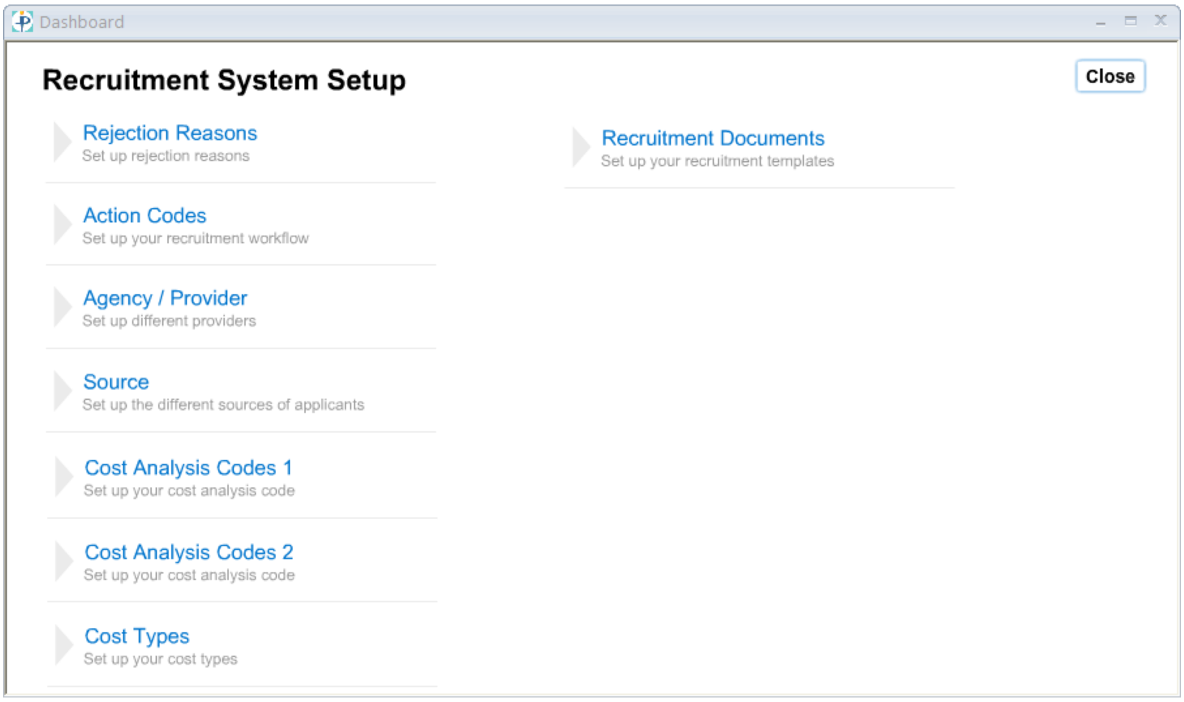
You can now continue with the additional set-up if required:

Tick when complete	Task	How?	Estimated Time
☐	Create a new vacancy	Using the Dashboard	5 minutes
☐	Add applicants to a vacancy	Using the Dashboard	2 minutes/ applicant
☐	Learn how to use the main areas of the system	Manuals, Knowledge base	1 hours
☐	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:

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

	Vacancy costs applicant costs etc.
☐	**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 used by most organisations:

The key to the diagram is as follows:

A = Action
R = Response
L = Letter

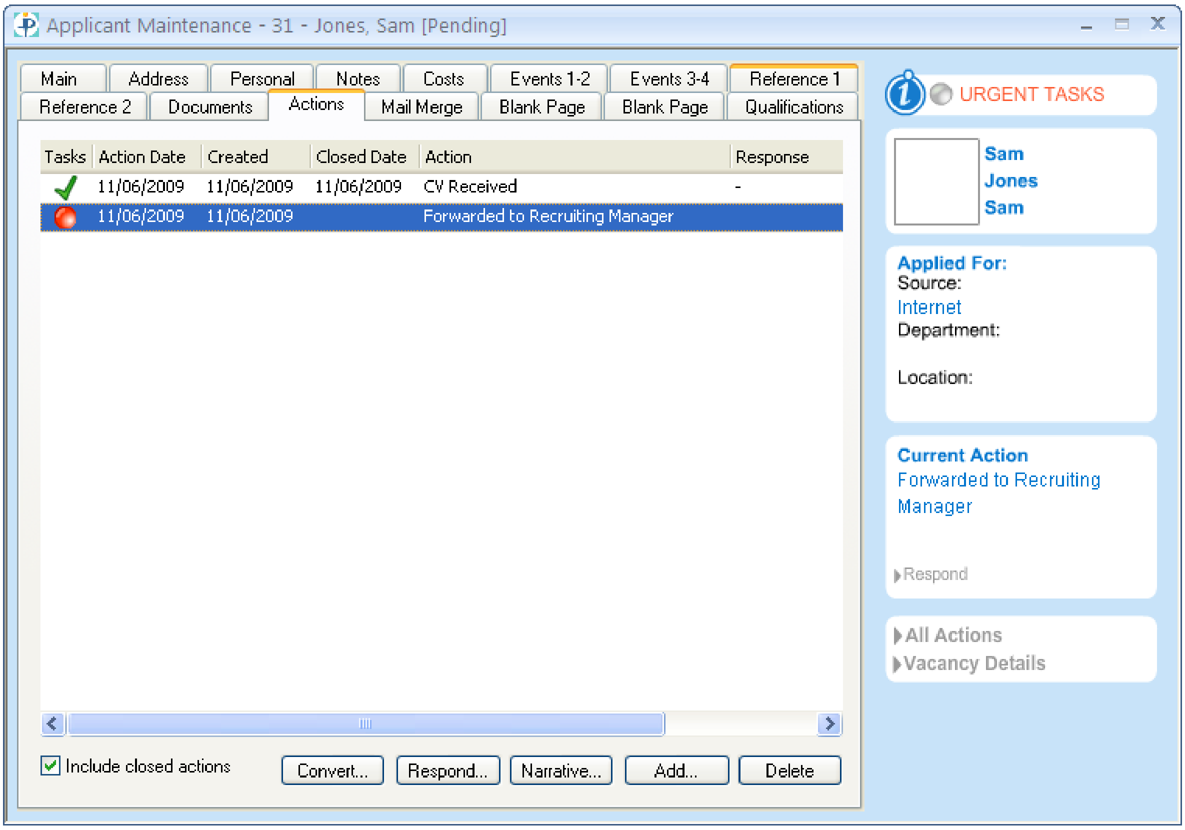
The process above starts with an action called CV Received. An action is then created called forward to Recruiting Manager at this stage a letter is also automatically created (to be printed later).

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.

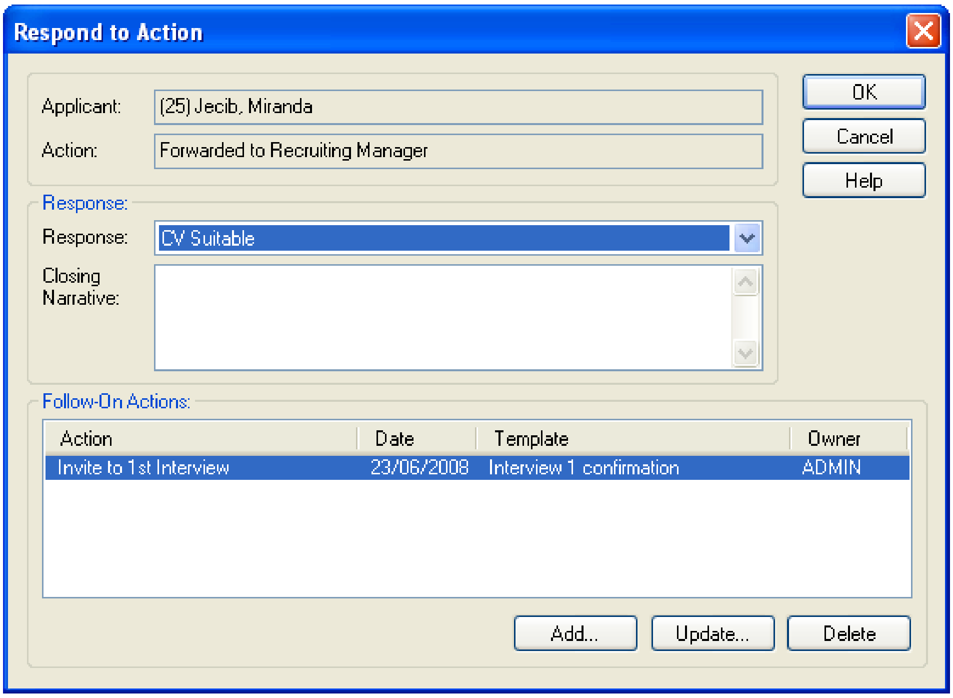
The process is then continued using the Action->Response approach. When an applicant is being processed then actions will be shown as things that need to be done and the response will be the possible responses to that action.

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:

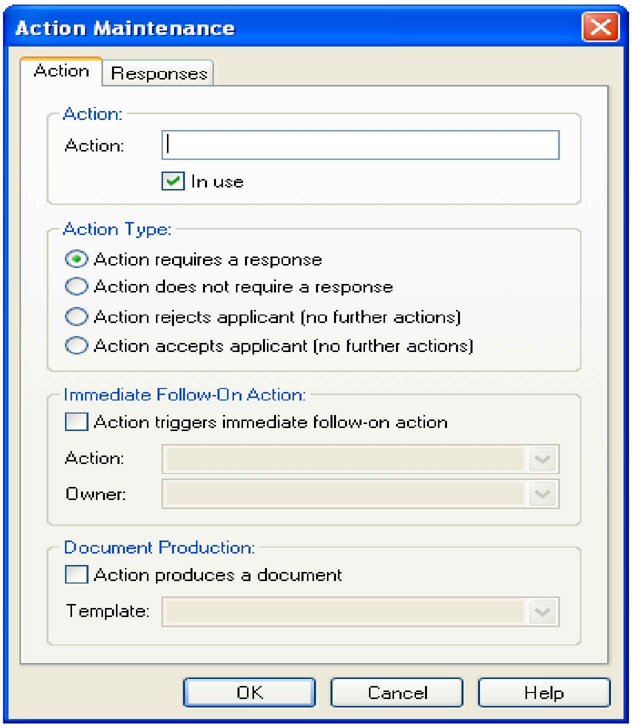


Depending upon the response you select the appropriate follow-on action will be shown, so on the screen above selecting CV Suitable shows that the follow-on action will be Invite to 1^{st} Interview and that the template Interview 1 confirmation will be used when producing the letter.

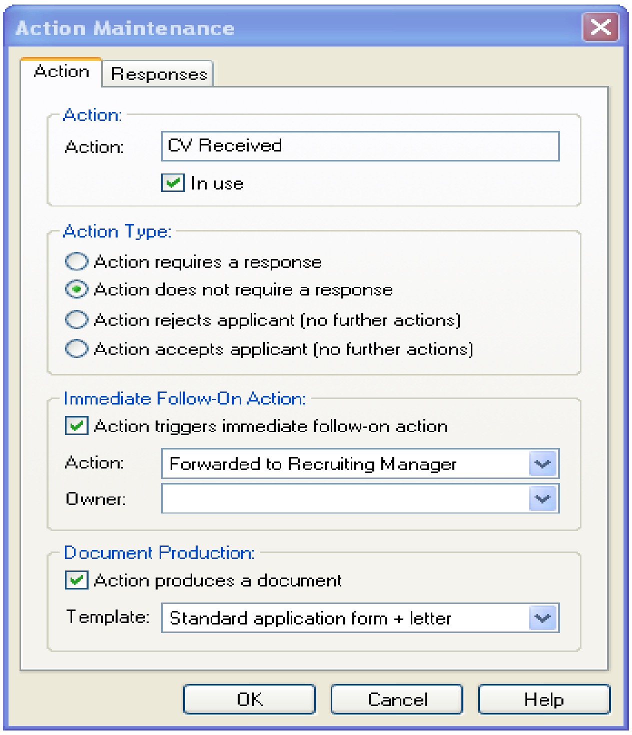
To create the recruitment workflow you will use the Dashboard > Recruitment > System setup > Action Codes, then select the add option, the following screen will be shown:

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.

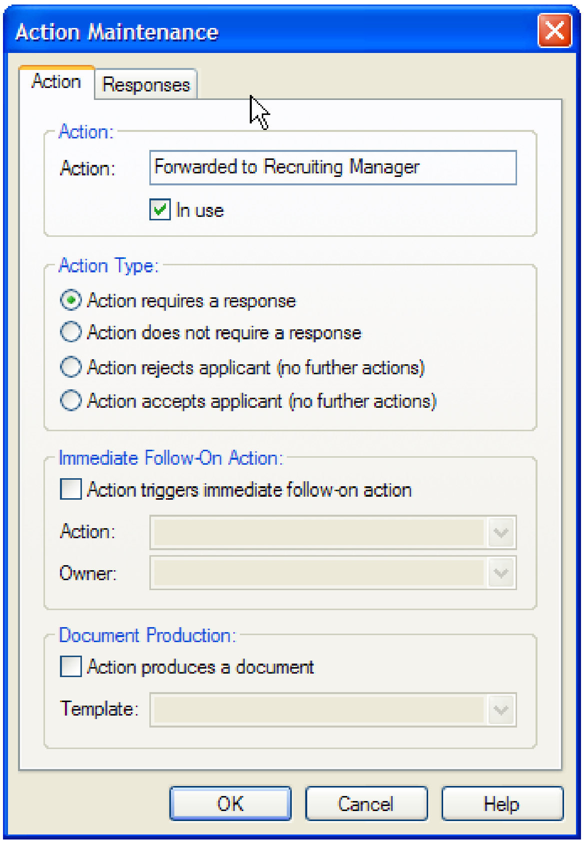
To provide you with an example of how this works with the flowchart, further on a series of screen shots are shown, which translate the process into a set of actions:



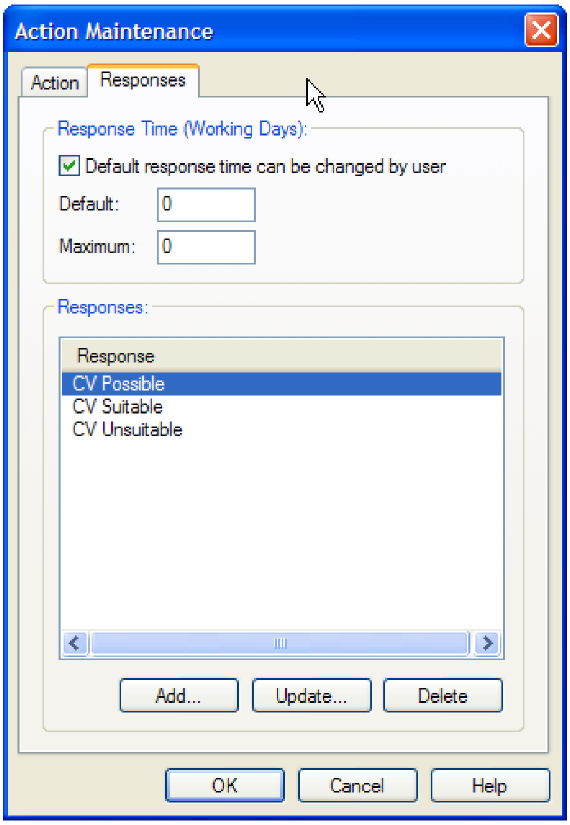
1. CV Received



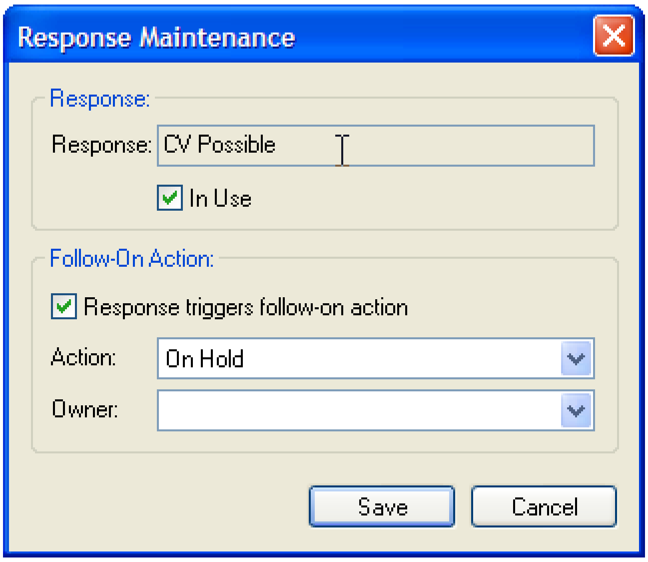
2. Forward to Recruiting Manager



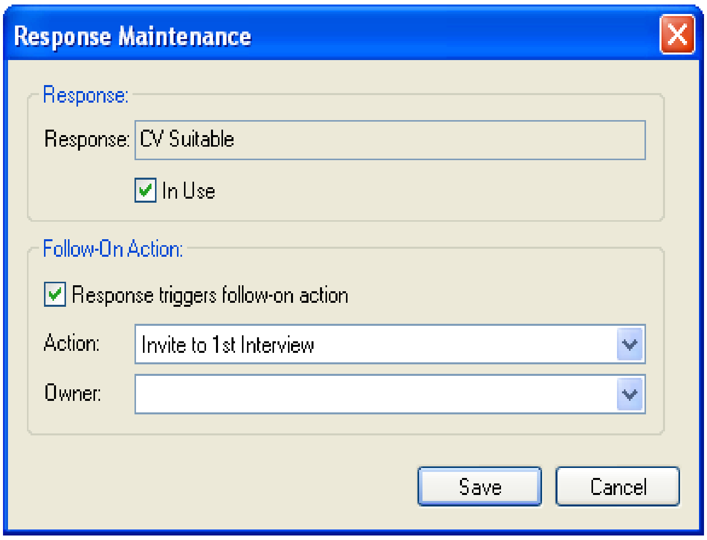
The responses tab shows:



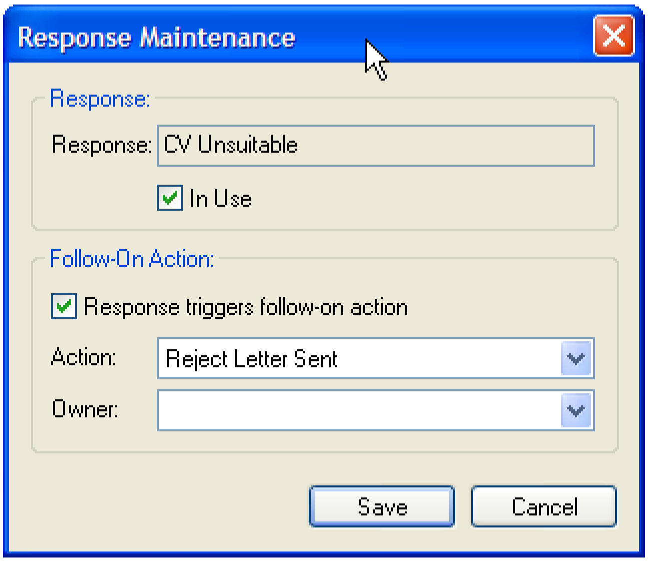
The CV Possible response creates the follow on action On Hold when selected:



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



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.

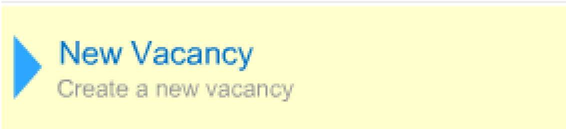
Setting-up standard document templates

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

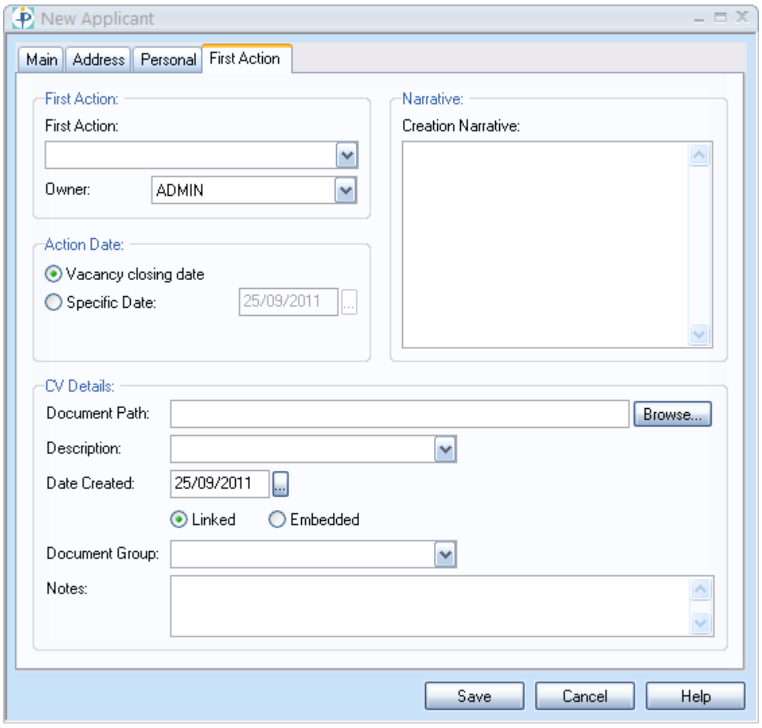
Create a new vacancy by selecting the new vacancy option from the recruitment section on the dashboard and click on create new vacancy:



Enter the basic details.

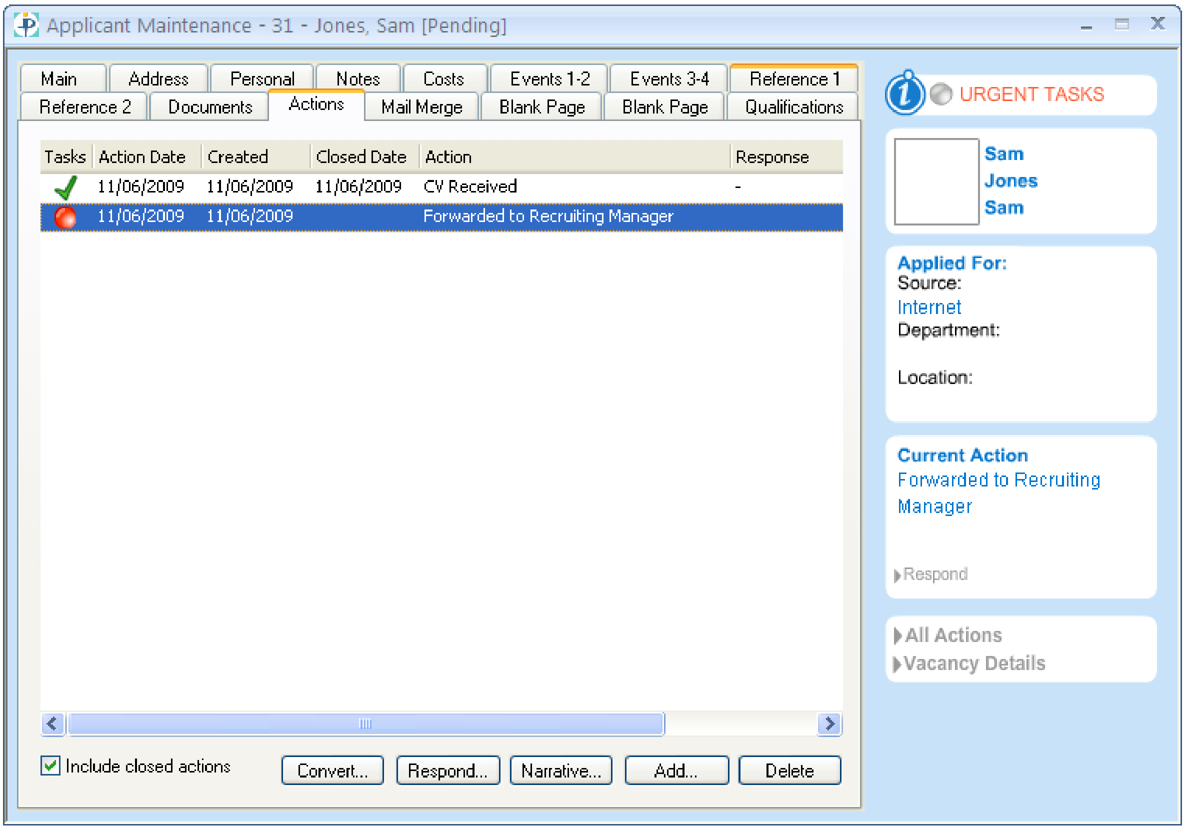
Creating Applicants and Work them through the Recruitment Workflow Process

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,

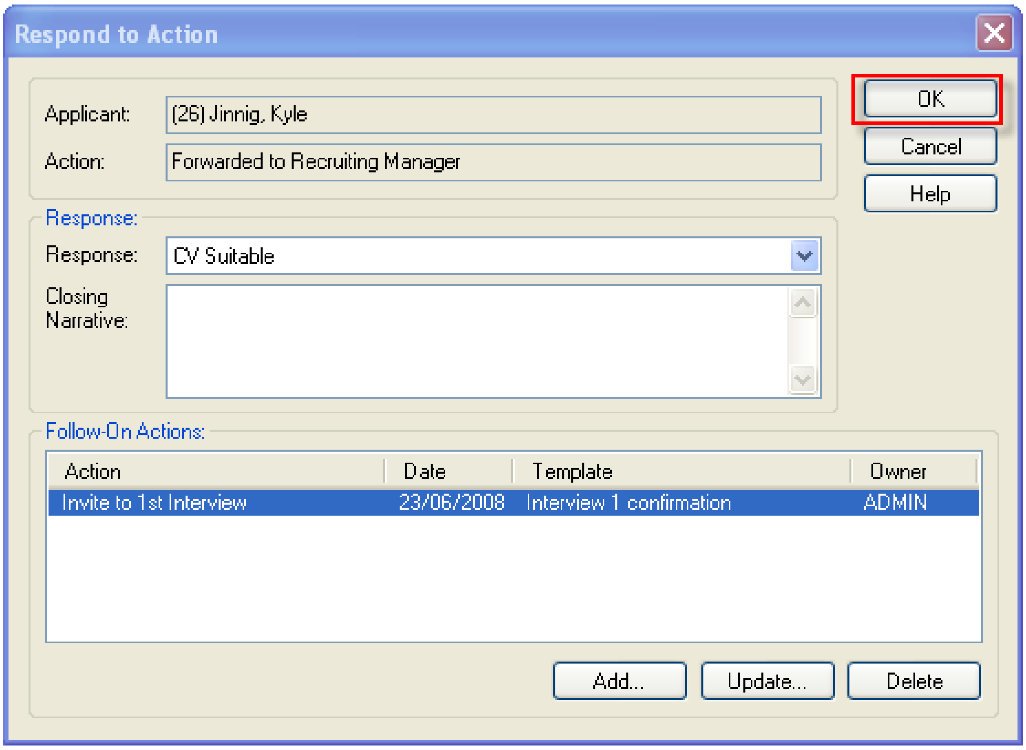


The first action will normally be CV Received. When you press the Finish button, select the option to add more details about this applicant:

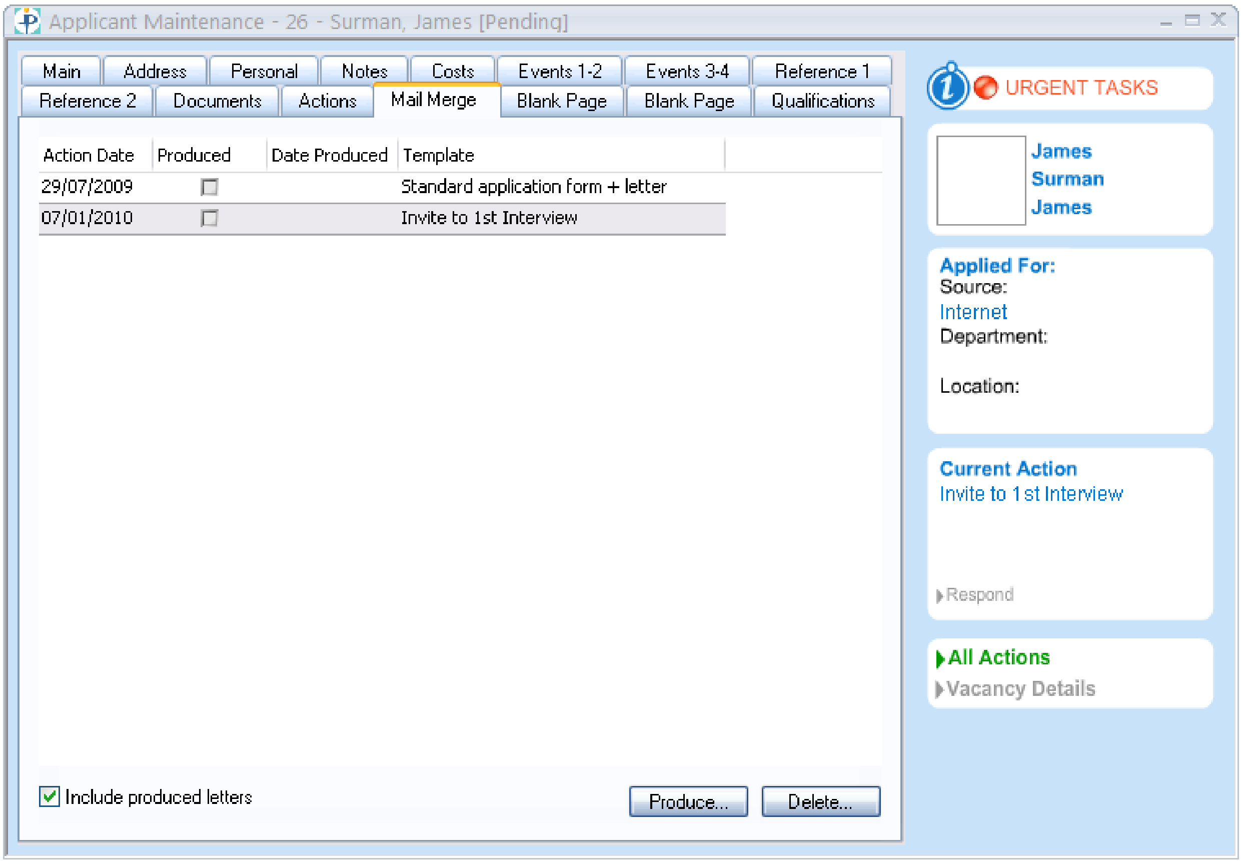
Then go to the actions tab:



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.



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.



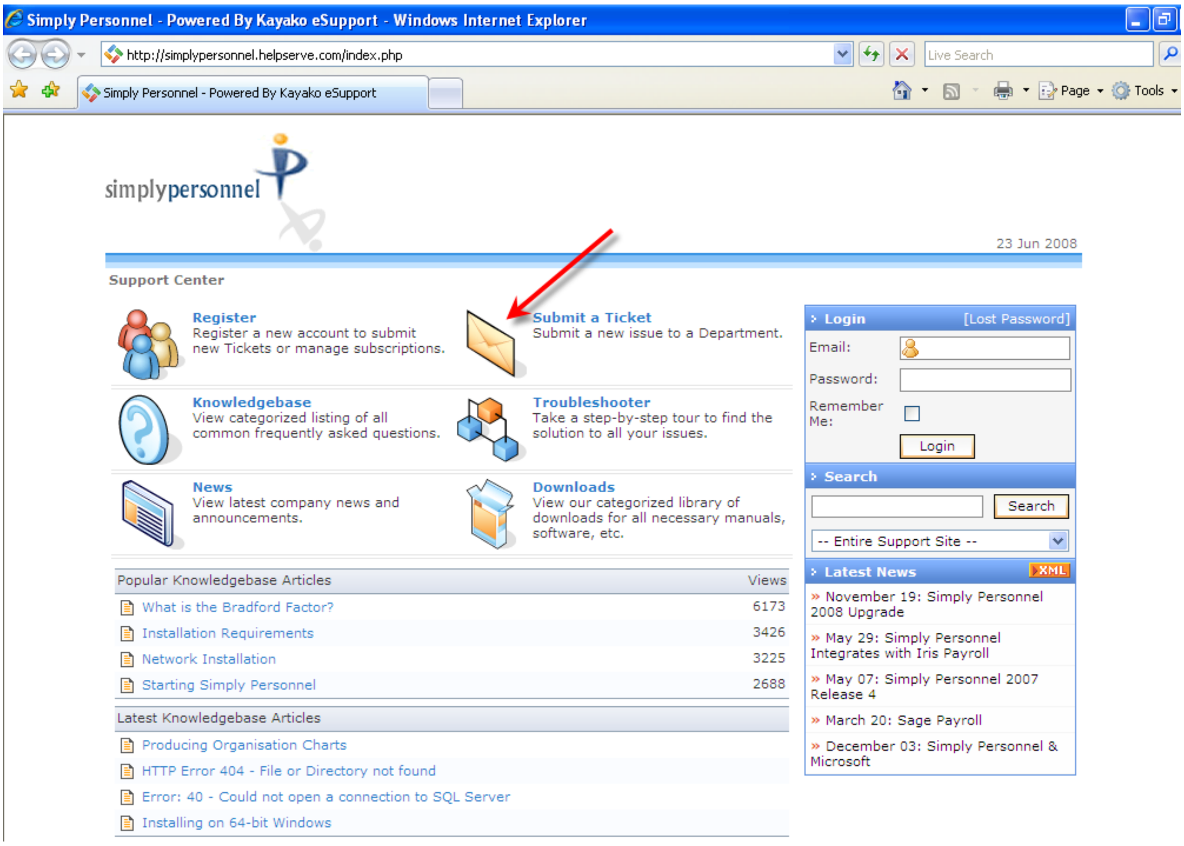
Learn How to Get More Help

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.