

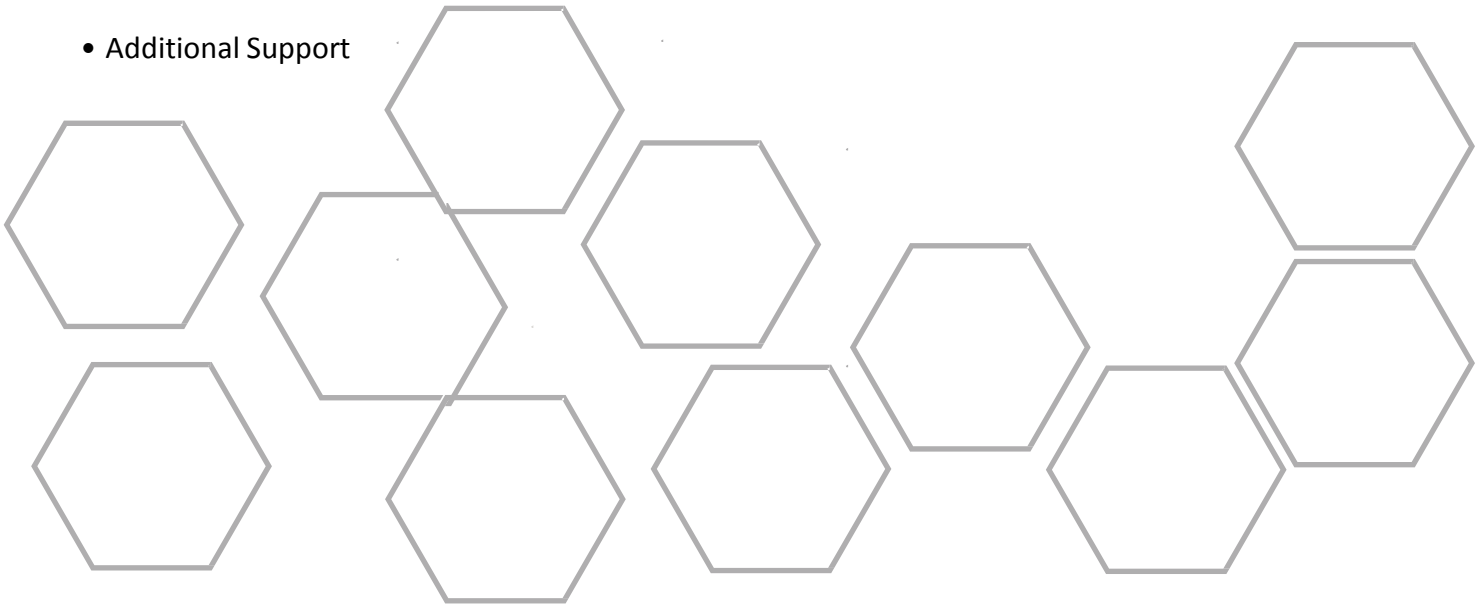


Hiring Manager Training Guide



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Introduction

The purpose of this manual is to be a reference to provide detailed information on navigating your Recruit and Hire system. This guide will show you how to use the commonly used tools by hiring managers in Recruit and Hire. This manual was specifically written for hiring managers to learn their organization's new Recruit and Hire system. It is also a useful aid for users needing a refresher on the basic aspects of Recruit and Hire.

Using This Manual

Each section of this manual addresses a tool or feature in Recruit and Hire that hiring managers will be using in their day to day operations.

Security Note

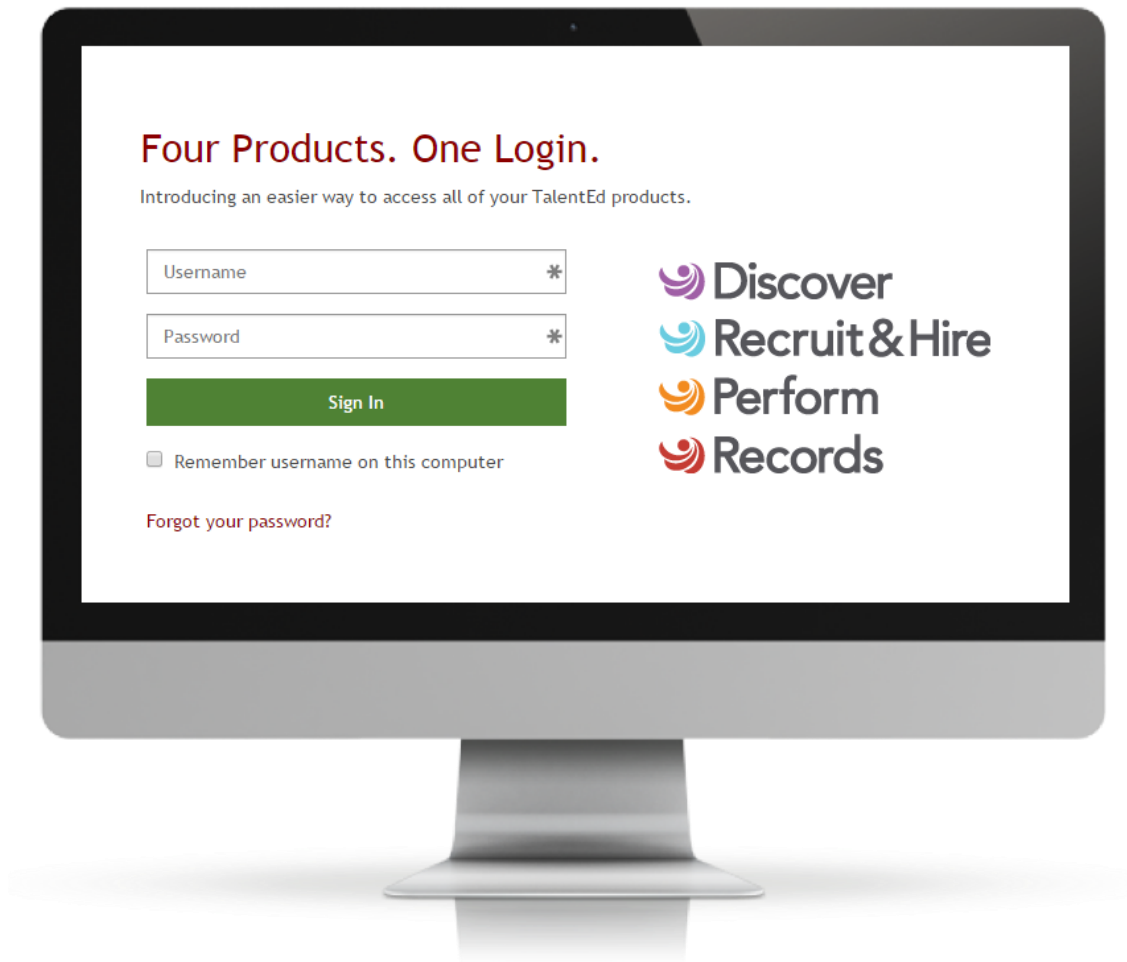
Depending the hiring tasks that you normally complete in your day to day operations, you may not have access to every tool listed in this guide. Please refer to your organization's system administrator if you have questions about your security group.

System Overview

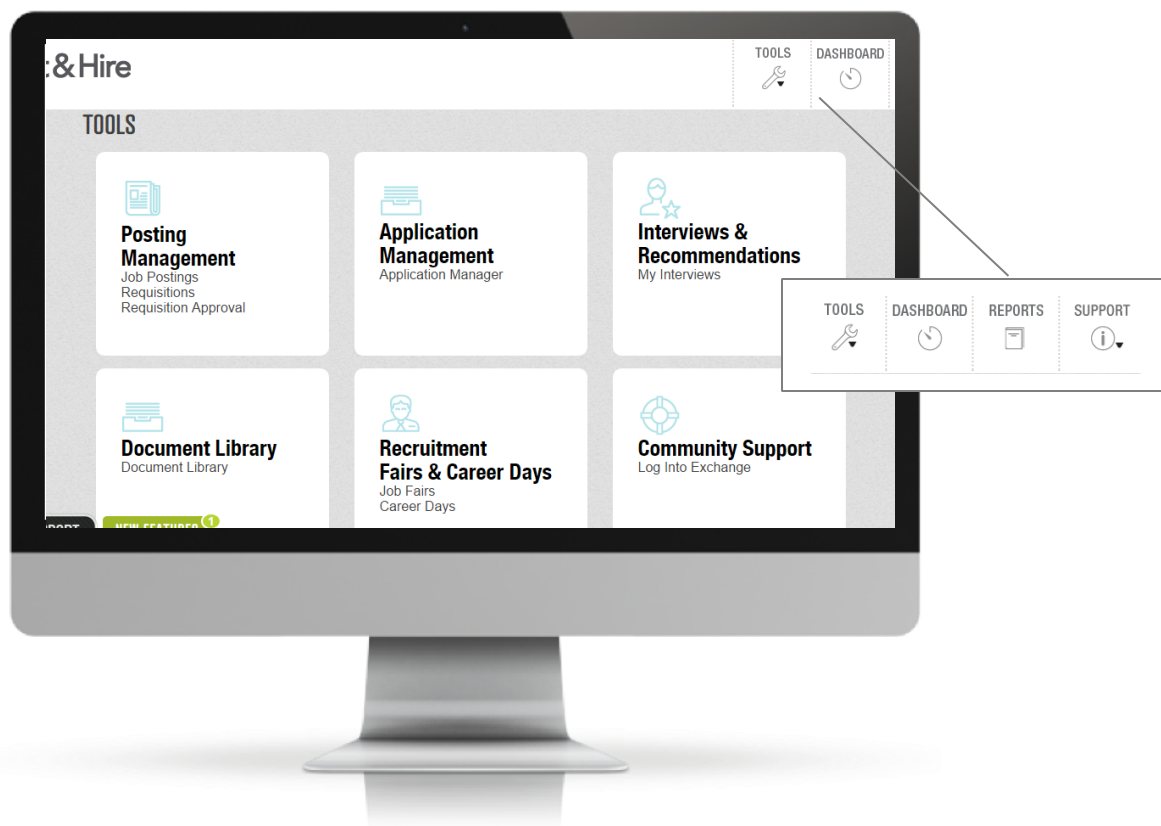
To begin Using Recruit and Hire, first log in using the credentials provided to you by your organization.

If you have trouble logging in, you can click on the 'Forgot your Password?' link to have an email sent to you to have your password reset.

When you first log into Recruit and Hire, you will be taken to the Tools landing page. This is where you, as a hiring manager, will spend the majority of your time in the system.



Tools Landing Page



The **Posting Management tool** is used to manage job postings and to submit and approve requisitions.

The **Application Management tool** allows you to review applications that come in, extend interviews, and hire a candidate.

The **Interviews & Recommendations tool** allows you to create your interview availability and to see all of your interviews that have been sent out, accepted, declined and completed.

The **Recruitment Fairs and Career Days tool** (Recruit & Hire Professional Only) is used for managing interviews of candidates that are invited to interview.

The **Community Support tool** allows you to log into TalentEd Exchange.

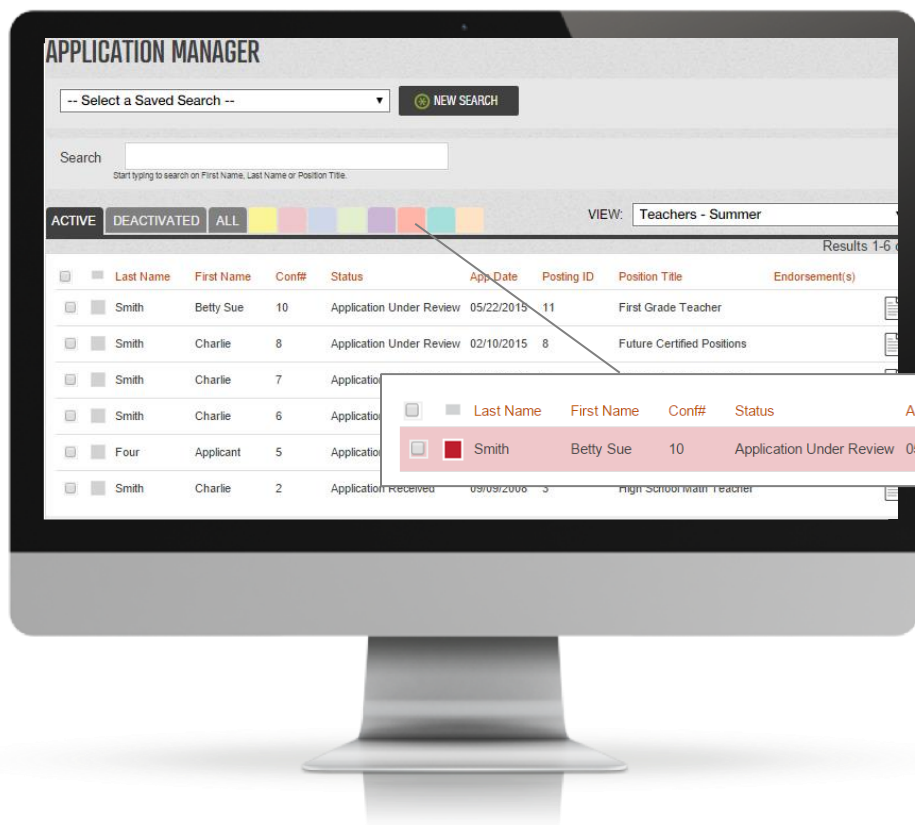
The icons on the top of the page also represent different areas within Recruit & Hire that you can navigate to:

The **Tools icon** allows you to hover over the icon and go to the same Recruit & Hire tools for quicker access.

The **Dashboard icon** allows you to see all of the interviews, hire approvals, tasks, requisition approvals and active postings all on one page.

The **Support icon** will take you to our TalentEd Knowledgebase, where you can get more information and how-to instructions on features in Recruit & Hire.

Review Applications



Application Manager

Once you start receiving applications in the system, you will use Recruit & Hire's Application Manager Tool to review applications and manage candidate folders.

- Click or hover over 'Tools', and click on **Application Manager**
- When you first open the Application Manager, you will see a list of the candidates who have applied to various positions in your organization. The candidates and applications you see are determined by your filter settings – ask your System Administrator for more details.
- The 'Active', 'Deactivated' and 'All' Tabs allow you to toggle between those types of candidates in the system.

Using Highlights

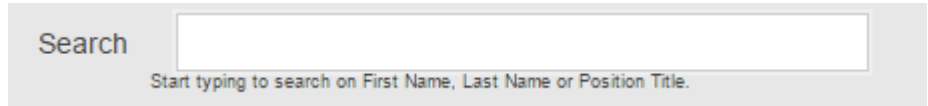
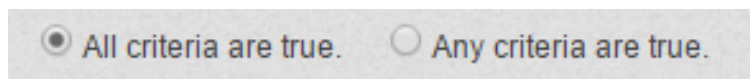
- You can also highlight candidate's different colors based on criteria of your choosing.
- To do so, click on the gray box next to the candidate's name and choose the appropriate color.
- This will then make the candidate's particular application line the color of your choosing.
- Please note that the highlight tool is intended for individual use, meaning that the highlights made on your application manager page will only be seen by you. These currently cannot be shared.
- You can also filter applications by your highlights by choosing the colored tabs above the candidate view.

Create, View & Share Searches

You can conduct searches for candidates in your system based on First or last name, or position title. To do so, simply type in the search bar toward the top of your application manager.

You can also conduct searches based on more specific criteria by creating your own searches.

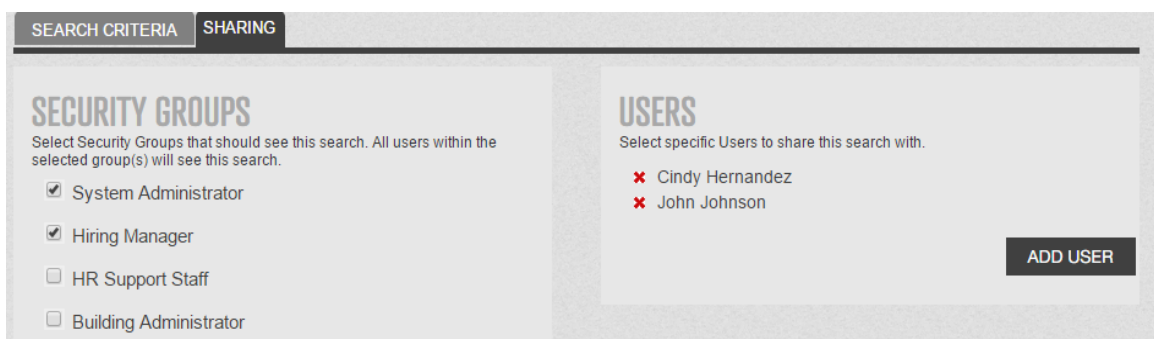
- To do so, click on the **'New Search'** icon.
- A dropdown will appear, where you can choose from a number of different criteria to narrow your search results.
- To add additional criteria, click the 'Add' button and it will add another row for you to add criteria to.
- Depending on the criteria chosen, you can choose to narrow your search to application that meet all or those criteria or at least one of them.

A search bar with the label "Search" and a text input field. Below the input field is a placeholder text: "Start typing to search on First Name, Last Name or Position Title."Two dropdown menus. The first is labeled "Application Age (Days)" and the second is labeled "Equals". Both have a downward arrow icon.Two radio buttons. The first is selected and labeled "All criteria are true." The second is labeled "Any criteria are true."

- Save your search by clicking the **'Save As'** button

When you create a search, it will be specific to your individual system. However you can share your saved searches with other users. To do so, click on the dropdown next to 'New Search' and click on **Edit/Remove/Share Searches**.

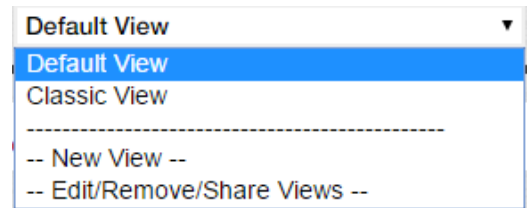
- When you share your search, you will be taken to a list of all of the searches that you have created and saved. Click the 'Edit' button on the search that you wish to share.
- Click on the **Sharing Tab**.
- You can choose to share your searches with security groups and/or individual users.
- Click on 'Save', and those searches will now be shared with your chosen groups/users.

A sharing interface with two tabs: "SEARCH CRITERIA" and "SHARING". The "SHARING" tab is active. It contains two sections: "SECURITY GROUPS" and "USERS". The "SECURITY GROUPS" section has a description: "Select Security Groups that should see this search. All users within the selected group(s) will see this search." and a list of groups with checkboxes: "System Administrator" (checked), "Hiring Manager" (checked), "HR Support Staff" (unchecked), and "Building Administrator" (unchecked). The "USERS" section has a description: "Select specific Users to share this search with." and a list of users with red 'x' icons: "Cindy Hernandez" and "John Johnson". There is an "ADD USER" button at the bottom right.

Create, View & Share Searches

Recruit & Hire lets you look at each applicant's information using various Views in the system. A view allows you to choose various pieces of information from application fields and view them in a side-by-side comparison.

- To build a view in Recruit & Hire, click on Application Manager under the 'Tools' button.
- Click on the dropdown next to 'View'. By default, Recruit & Hire has a 'Classic View', and 'Default View'. Click on 'New View' to create a new view.
- When you first create a new view, you can configure the columns that appear by clicking on 'Add Column'.
- Use the section filters in the Add Columns window to narrow down the column result set. Click the 'Add' button to add a column to your view.



ADD COLUMN

Question		Section	Column Name	
1	⬆ ⬇ ⬆ Last Name	Contact Information	Last Name	REMOVE
2	⬆ ⬇ ⬆ First Name	Contact Information	First Name	REMOVE
3	⬆ ⬇ ⬆ Application ID	Application	Conf#	REMOVE

- You can rearrange the order of the columns by using the up and down icon next to the number of the column. Click and drag the row to the desired position.
- To share a view, click on the 'Sharing' tab, choose the security group(s) and/or user(s) to share your view with.
- Click save, and your created view will now be shared with your chosen groups/users.

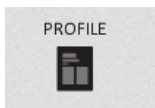
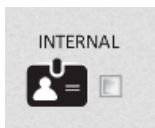
Applicant Profile/Folder



When you are ready to review the applicant's profile and applications, you can use the application and profile icons located within the application manager.

- The Print Application icon allows you to view the applicant's application information in PDF format.
- The Print Packet icon allows you to pick and choose certain areas of the applicant's application. When you click on this icon a new window will appear for you to choose the areas you would like included in the PDF.
- The Applicant Folder icon allows you to explore the applicant's information in more detail. It also allows you to schedule interviews, record impressions about the candidate and various other tasks.




Applicant Folder Review



When you open an applicant's folder, there are a number of areas that you can review and actions you can take.

- The **Email** icon allows you to email candidates. You can choose to show your email address for a reply, or to send an alias 'Do Not Reply' email address. You can also choose an email template to use if your organization has created one. Please speak with your system administrator regarding email templates.
- The **Internal** icon indicates to you if someone in Recruit and Hire is a current employee. You can also mark a candidate as internal or remove them as internal using this icon.
- The **Profile** icon allows you to see the most up to date information that the applicant has provided on their profile. This differs from the 'Print Application' icon as any information that may have changed, such as their address will be captured here.

Applicant Folder Review - App

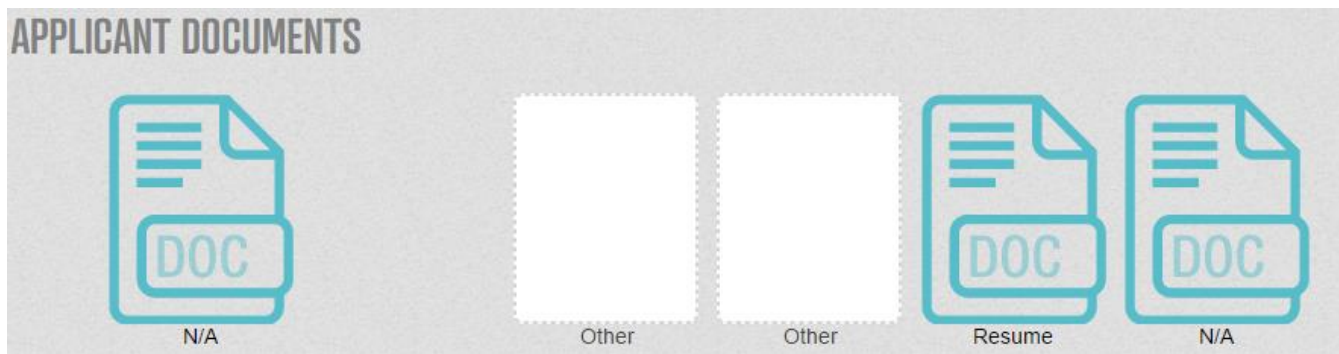
Application Date ▼	Posting Title	Active	Status	Prescreen Rating	Hired	
09/09/2008	High School Math Teacher	Yes	Application Received			  

The app tab will carry information about the application(s) that the candidate has submitted.

- This tab has the same 'Print Application' and 'Print Application Packet' icons as the application manager page, as well as an 'HTML' icon.
- The HTML icon allows you to see the application that has been submitted. In addition, you can choose to toggle different sections of the application on and off for printing.
- The app tab will show you the job description of the position the applicant has applied for. You can also see all other applications that the applicant has applied for.



Applicant Folder Review - Docs



ADD DOCUMENT

The Docs tab allows you to see the attachments that the applicant has provided on their application.

- When you click on one of the attachment icons, it will download a copy of the attachment to your computer.
- The HR Documents section allows you to add supporting documents to the applicant's folder. This information is *not* seen by the applicant, and can be used as a catch-all for any documents related to the applicant, such as background check results.

Applicant Folder Review - Reference

REFERENCE CHECKS

<input type="checkbox"/>	Reference	Form	Form Complete	Status	Rating Date ▼	Rating By	Rating
<input type="checkbox"/>	Joh Reference	Certified Survey	02/10/2015				REVIEW

REFERENCE CHECK: JOH REFERENCE

Boss netchemiacsm@gmail.com 5555555555

CERTIFIED SURVEY

What is your relationship to this candidate?
What position and responsibilities did this person hold?
How well would you say this person responds to supervision?
How would you rate this person's attendance?
How would you rate this person's dependability?

Job Reference2 Classified Survey No - Remind

Use the Reference tab to review the references that the candidate has identified on their application.

- Click on the 'Review' button to see the answers that the reference has provided on their form.
- You can also record your impressions about the reference's answers by filling out the 'My Rating & Notes' form.
- If you are waiting on a response from a reference, you can remind the reference and send out another reference form by clicking the 'Remind' link.

Applicant Folder Review - Reference

CREATE A NEW REFERENCE CHECK

Choose Reference Form Certified Survey

CANCEL

COMPLETE MANUALLY

SEND VIA EMAIL

REFERENCES

<input type="checkbox"/>	Reference	Relationship	Checks	Last Rating			
<input type="checkbox"/>	Joh Reference	Other - Boss	Yes (4)				<div>ADD CHECK</div> <div>EDIT</div>
<input type="checkbox"/>	Job Reference2	Other - test	Yes (2)				<div>ADD CHECK</div> <div>EDIT</div>
<input type="checkbox"/>	Job Reference3	Other - test	Yes (2)				<div>ADD CHECK</div> <div>EDIT</div>

ADD CHECK TO SELECTED

NEW REFERENCE

You can also create manual references in the system, as well as conduct manual reference checks, using the second half of the reference tab screen.

- To create a new reference in the system, click on 'New Reference'. This reference is be seen by HR only and *not* seen by the candidate.
- To create a new reference check, click on 'Add Check' next to the reference.
- You will then be asked which reference form you would like to have completed.
 - You will have the option to either complete the form manually via a phone call or to send the form via email.

Applicant Folder Review - Task

ADD TASK

ADD HR TASK

Due Date *

08132015

Subject

Action Status

Priority

Assigned To *

SELECT

Notify via Email

☒

Results

In Recruit and Hire you can assign tasks specific to an applicant. An example of this would be requesting a background check and to add the results to the applicant's folder.

- To assign a task in the system, click on 'Add Task'.
- You will then be taken to a new page to fill out your task information. You can choose to designate the task to a person by removing your name and clicking the 'Select' button.
- You can see the tasks that you have assigned within the task tab.

Due Date ▼	Subject	Status	Priority	Assigned To	Results	Com
08/13/2015	Please condu...	Active	High	Cindy Sue, Smith		

Applicant Folder Review - Screening

If certain screening methods are used in your organization for candidates, you can record the results in the screening tab. Any new screenings can be added by clicking on the 'Add Screen Result' button.

- The results of this score will follow the applicant as they apply to positions within your organization.

Applicant Folder Review - Notes

The Notes tab allows you to record notes about the applicant. It's important to note that anything that recorded on this tab can be used for review for legal purposes. Please speak with your system administrator on use cases for this feature.

- Please note that any notes recorded in this section are *not* seen by the applicant, however any Recruit and Hire user that is able to review this applicant's folder will be able to see the notes.

Scheduling Interviews

When you are ready to extend an interview to an applicant, you will create your interview availability that is based off of your schedule, then invite the candidate(s) that you wish to conduct an interview with.

- In order to allow candidates to self-schedule interviews, you must create your availability in the system first. These are the time frames in which you're available to conduct interviews. Click on Tools, and choose 'My Interviews'.
- Click on 'Manage Availability' to add availability to your interviews.
- When you click on 'Add Availability', a new window will appear. Here you can add the date, time block(s) for the job postings that you'd like to interview for.

Scheduling Interviews

NEW INTERVIEW BLOCK

Date *08/18/2015

Begin *1:00 PM

End *4:00 PM

Job Postings

AllAssistant Food Service DirectorFirst Grade TeacherFuture Certified PositionsFuture Classified PositionsTest

CANCEL

SAVE BLOCK

To extend an interview to candidates, click on [Tools](#) and choose 'Application Manager'.

- Click on the checkbox of the applicant or applicants that you would like to interview.
- Toward the bottom of the Application Manager Page, is a drop down for 'Bulk Actions'. Click on it and select [Interview](#) and click the 'Go' button.

Application Actions			
Activate	<input checked="" type="checkbox"/>	Smith	Charlie 6
Deactivate	<input type="checkbox"/>		
Add Highlights	<input checked="" type="checkbox"/>	Four	Applicant 5
Print			
Print Packet			
Candidate Actions			
Interview			
Email			
Invite to Career Day			
Make Internal			
Remove Internal			
Reference Check Survey			
Interview			

APPLICANT/S

Charlie Smith [test@netchemia.com]
Applicant Four [ap4@netchemia.com]

- The first part of scheduling interviews identifies the candidate that you're extending an interview to.
- When you schedule an interview, the Interviewer will always be the Recruit and Hire user that clicked on the 'schedule interview' button. This can be changed by clicking the 'X' near the interviewer name.
- If you would like to add additional interviewers or schedule an interview on someone's behalf, you can click on the 'Add Interviewers' button.
- A new window will open with a list of Recruit and Hire users to choose from. To remove yourself, simply click the red 'X' next to your name.

DETAILS

Interviewer's * Thomas Davis X

No Additional Interviewers

ADD INTERVIEWERS


Scheduling Interviews

Job Posting* **High School Math Teacher** ▼


Interview Type ▼

Interview Location* ▼

Interview Survey **(none)** ▼

☒ Allow applicant to self-schedule interview by selecting from the available time slots configured below:
Interview must occur on or before* 
Interview Length* **15 Minutes** ▼

☐ Schedule an interview for a specific date and time and notify applicant

Interview Date* 

Start Time*

End Time*













- **Job Posting (Required)** - The job posting drop down will allow you to choose which position you want to interview the candidate for, if they have applied for multiple positions in your organization.
- **Interview Type** - The Interview Type lets the candidate know what type of interview is being conducted.
- **Interview Location (Required)** – The Interview location communicates to the applicant where the interview is being held.
- **Interview Survey** – You can choose to have an associated interview survey that will allow you to record your impressions about the candidate.

To have the interviewee(s) choose from your availability windows, click the button that allows the applicant to self-schedule their interview.













- You can also choose to schedule an interview time for a candidate. This is useful if you've previously spoken with the candidate and have already established a time for them to come in.
- If there are any messages that you need to relay to the interviewer(s) or to the applicant(s), you can include them in the message section of the interview form. These messages are sent via email.

When scheduling interviews, both applicants and interviewers may receive interview invitations via email. Any additional direction or notes you select to add below will be included with those emails.

Message to Interviewer(s)


B *I* U  Font Size           HTML 

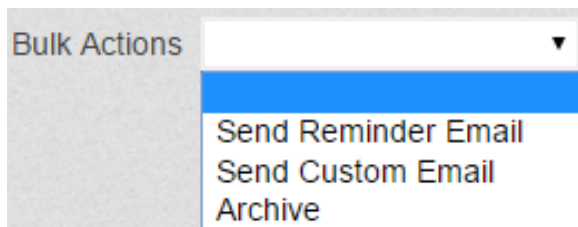
Message to Applicant(s)

B *I* U  Font Size           HTML 

Select Email from Template

Scheduling Interviews

INVITED							ACCEPTED	DECLINED	COMPLETED	ARCHIVED	
<input type="checkbox"/> Candidate ▲	Date	Type	Job	Location	Internal						
<input type="checkbox"/> Ashleigh Bynum	 05/15/2015 2:00 PM	Building Level	First Grade Teacher	LISD Office	Yes						ADD RESULT



MY INTERVIEW CALENDAR SUBSCRIPTION

To view the status of the interviews that you have scheduled, click on the 'My Interviews' link under Tools.

- You can use the Bulk Actions feature under 'My Interviews' to send reminders to applicants that have not yet accepted your interview.
- If you would like to add your interviews to your personal calendar, you can click on 'My Interview Calendar Subscription'.
- To record your impressions about an individual candidate's interview, click on the blue applicant folder under Application Manager, navigate to the 'Interview' tab and click on 'Add Interview Result'
- If there is a specific candidate that you want to recommend to hire to your HR staff, you may do so under the Application Manager icon.
- Click on the specific blue applicant folder.
- Under the Interview tab, navigate to the 'Add Recommendation to Hire' button.
- If your organization has created a Recommend to Hire form, you will fill out any relevant questions and click on 'Submit'.

RECOMMEND TO HIRE: CHARLIE SMITH

What are the specific reasons for recommending this candidate for the position?

Number of professional references checked?

Number of applicants interviewed?

SUBMIT **CANCEL**

Submitting, Viewing and Approving Requisitions

Requisitions allow you to fill out a form to request either a new position to be created or a position to be filled.

To submit a requisition for approval, navigate to the [Requisitions](#) under 'Tools'.

- Click on 'New Requisition'
- If the requisition is for a position to be filled, you can select 'Select Job from Template' to pre-fill out information regarding the position.
- Fill out the remaining required information, as well as any additional information that you have about the position and/or the vacating employee.
- Once you fill out the form, choose the workflow for the form to go to for approval. Once you choose a workflow, Recruit and Hire will show you the approval path so that you can verify who it should go to.

The screenshot shows the 'REQUISITIONS' interface. At the top right, it says 'Requisition Approval (0)'. Below this is a search bar with a magnifying glass icon and a checkbox labeled 'Only show requisitions I submitted.' Below the search bar are several filter tabs: DRAFT, SUBMITTED, APPROVED, DENIED, ASSIGNED TO JOB POOL, FILLED/HIRED, and ARCHIVED. Below the tabs, it says 'Results 0-0 of 0'. Below this is a table with columns: ID (with a dropdown arrow), Title, Category, Location, and Submitter. At the bottom of the interface are four buttons: DELETE SELECTED, ARCHIVE SELECTED, EXIT, and NEW REQUISITION.

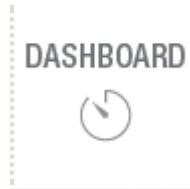
To approve requisitions, navigate to [Requisition Approval](#) under 'Tools'. Click on the 'Edit' button for the requisition you would like to take action on.

- Review the form. If there are any changes that you need to make on the form, click on the red 'Edit' link next to the section that needs editing.
- Submit your decision at the bottom of the page by choosing to either deny or approve the requisition, and adding any optional comments.

The screenshot shows the bottom of the requisition form with three buttons: CANCEL, DENY REQUISITION, and APPROVE REQUISITION.

Dashboard Review - Job Postings

The Dashboard tab is a place for you to conveniently view items related to you, such as your accepted interviews, requisitions to approve and tasks to complete.



The dashboard tab also contains the Job Postings section, which allows you to view both open and closed positions, the open and closed dates for each posting, and the number of applications that have come in for those postings.

To view a job posting's applicants, simply click on the 'Applications' button to the right of the job posting.

JOB POSTINGS						
<div>OPENCLOSED</div>						
Job Title	Location	Open (Int)	Close (Int)	Open (Ext)	Close (Ext)	# of Apps ▼
Assistant Food Service Di	Food Service	05/12/2015	-	05/15/2015	-	1
First Grade Teacher	Dolor Elementary School	05/12/2015	-	05/15/2015	-	1
Future Classified Positio	LISD Office	-	-	03/01/2015	-	1
Future Certified Position	LISD Office	-	-	03/01/2015	-	1
Test	Lorem Ipsum High School	06/01/2015	-	06/06/2015	-	0
1						

Additional Support

- You can receive additional support on tools and features in Recruit and Hire using the TalentEd Knowledge Base.
- To access the Knowledge Base, click on the 'Support' tab on the bottom of your Recruit and Hire page, and click on the 'Help' icon.
- A new window will appear, from there you can type in the topic of choice.

A white rectangular window with a thin grey border. At the top, it says 'What do you need help with?' in a small grey font. Below this is a text input field containing the text 'Application Manager'. At the bottom right, there are two dark grey buttons with white text: 'CANCEL' and 'SEARCH'. A small diagonal line icon is in the bottom right corner of the window.