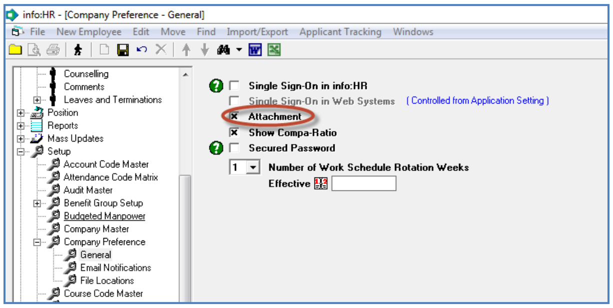
Table of Contents

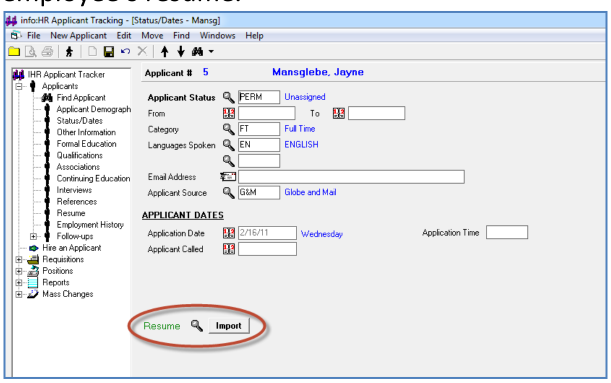
General Information

Attaching Documents

The assumption is made that the Document Attachment option is turned on. To check this, go to the **Setup/Company Preferences/General** screen. Ensure the **Attachment** box is checked.



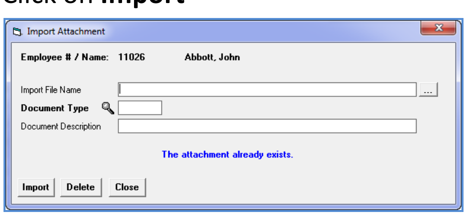
Throughout info:HR there are various screens that allow the ability to attach a document to a record. For example: On the **Status/Dates** screen you have the ability to import a copy of the employee's resume.



The Import icon will appear in two ways.

1.  Without the red "X" means there is currently a document attached to the record. If you would like to view the attached document simply click on the magnify glass.
2.  With the red "X" over the magnify glass means there are currently no documents attached to this record. If you would like to **Import** a document:

- Click on **Import**



  - To locate the file, click on the three dots button to the right of the box and find the file using the lookup.
  - Select a **Document Type** code. (*If document type code has a red "X" over the magnify glass, use security master to grant access to that code table*.)
  - If desired enter a **Document Description.**

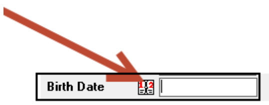
   - When complete, click on **Import** and answer "**Yes**" to save the document.

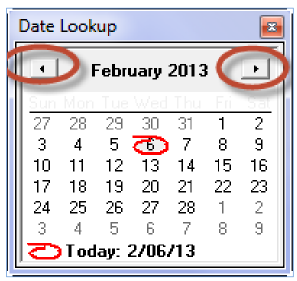
To delete the document or replace the document with another one, click on the **Import** button and click on either the **Import** or **Delete** buttons.

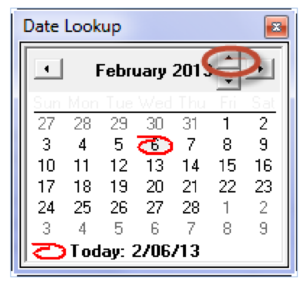
Date Lookups

Any field that requires a date be entered can either be typed date manually (remember to use the date format set in Windows e.g. mm/dd/yyyy), or you can use the date icon ( ) to select a date from the pop-up.

Navigation can be done by clicking on the month and year. Once the Month and Year are selected, click on the day of the month that's needed. The right or left single arrow keys will increase or decrease the month. The up and down arrow keys will increase or decrease the year.

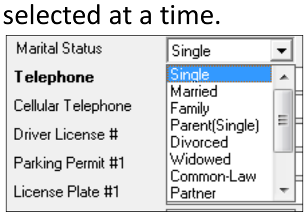




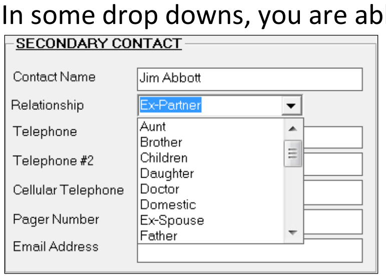


Drop Down Lists

Click on the drop down arrow and select one of the values listed. Only one value may be selected at a time.



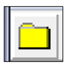
- In some drop downs, you are able to enter new values by typing the value into the field.

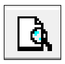


Navigating

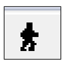
Menu Icons

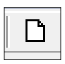
At the top of the info:HR window there is a row of icons that allow you to perform different functions throughout the system.

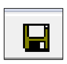
 **Close –** Will close the screen you are working in while leaving info:HR open.

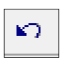
 **View** – Will allow you to view information prior to printing.

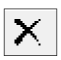
 **Print** – Will send the document to the printer without viewing.

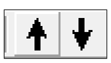
 **New Applicant** – Will begin a new hire.

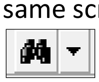
 **New Record** – Will allow you to enter a new record in any screen.

 **OK/Save** – Click to save the information entered.

 **Cancel** – Will return you to the last saved point, removing all information entered that was not saved.

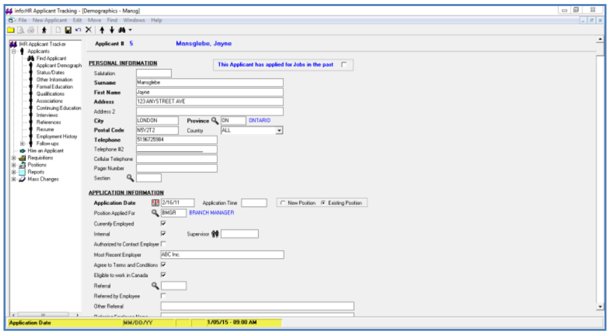
 **Delete** – Will delete the selected record.

 **Row Up/Down** – Provides the ability to move through a list of while remaining in the same screen.

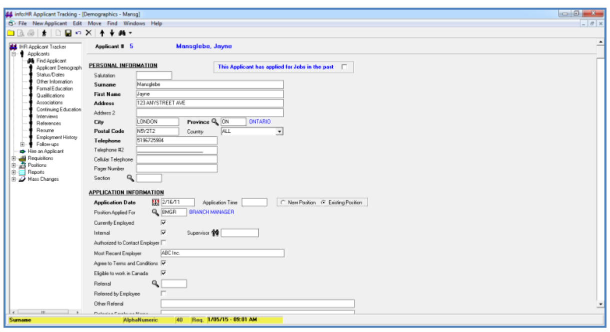
 **Find** – Provides the ability to Find Active Applicant, Find Opening Requisition, Find Closed requisition, Find Position.

Information Bar

At the bottom of the info:HR window you will notice an information bar. This bar will tell you the field your curser is active on, the format of the information to be entered, the number of characters you are able to enter in the field and whether it is a required field or not. It also displays the current date and time in the format set in your computer.



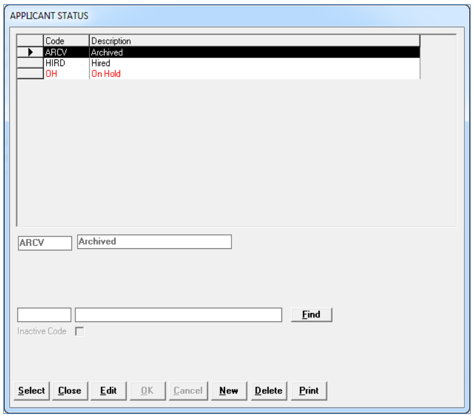
In the screen above notice the information highlighted. The curser is located in the Application Date field.



In the screen above the cursor is in the Surname field, which is an alphanumeric field that can hold 40 characters. It is bolded, indicating that it is a required field.

Table Lookups

Anywhere you see a **magnify glass** ( ), there is a coding table where the codes are stored for that field. All Table Lookups have the same basic functions.



- To create a new code select **New**
- Enter in the **Code** and the **Description**
- Select **OK**

Notes:

1. A search can be made for any code by either typing in the code or description then selecting **Find**. A code and description showing in red indicates it has been made inactive; the code cannot be used but it has been in the past and the history is maintained in the data base.
2. Some codes have other options that are maintainable on this screen too. For example, the Attendance Code lookup has “Seniority”, Incentive”, “Emergency Flag”, etc. that are maintained on this screen.

Buttons	Function
Select	Once a code is highlighted, it can either be double clicked on, or click on the **Select** button to choose the code.
Close	Closes the coding table.
Edit	To edit a description of a code and other options, the code itself cannot be changed.
OK	When an edit is made select OK to save the changes.
Cancel	Will stop any actions taken.
New	To enter a new Code.
Delete	To delete a code.
Print	Will print a list of all codes displayed in the table.

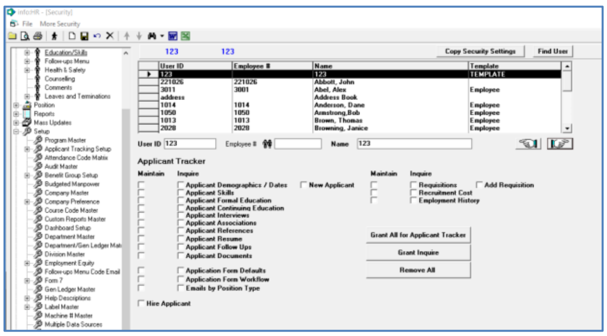
info:HR Setup Steps

In order for Applicant Tracking to operate properly there are a few setup steps to be completed in info:HR prior to opening the Web Form. Also, there are some code tables to be developed and codes to be assigned to ensure the Applicant Tracking Module runs smoothly.

Security

Setup ➧Security➧Security Master

This screen provides the ability for administrators to grant access to various screens and functions in the **Applicant Tracking** module.

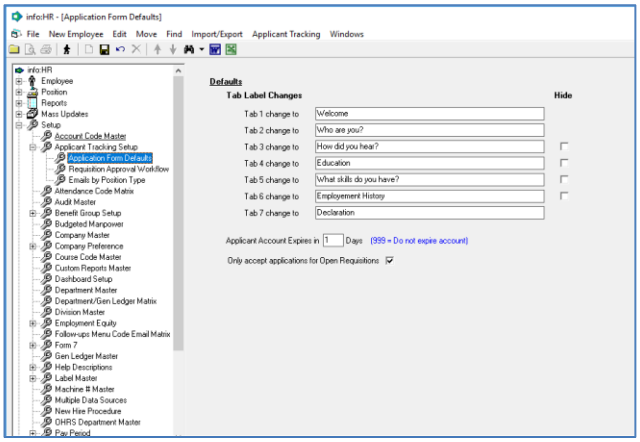


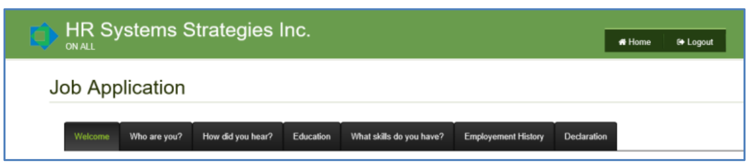
Select the screens the users will have access to inquire and maintain. It is best to assign the security to the templates.

Applicant Tracking Setup

Setup ➧ Applicant Tracking Setup ➧ Application Form Defaults

The Application Form Defaults screen provides the ability to change the tab titles and hide tabs the organization does not require to be completed by an applicant.

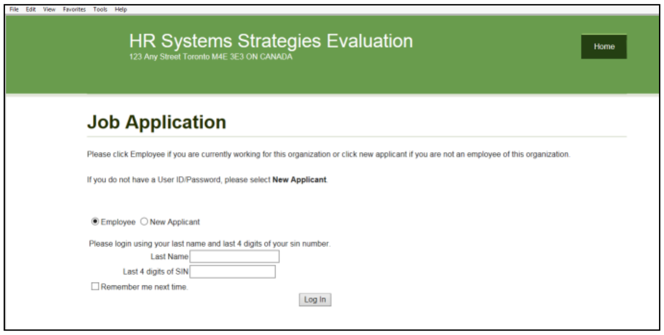




Web Form

The Web Form provides the ability for applicants to apply for a specific position or open requisition on your organization's website. Once the application is finished, the applicant's information will be available in the Applicant Tracking module. The Organization name, address and logo are updated in the settings screen. The setting screen can be found at <path to web form>/IHRApplicant/settings.aspx.

Screen Layout – Current Employee



- Current employees enter their identifying information to continue with the application.
  - The web form will search the info:HR database and auto-populate various screens in the application form with information already on file.

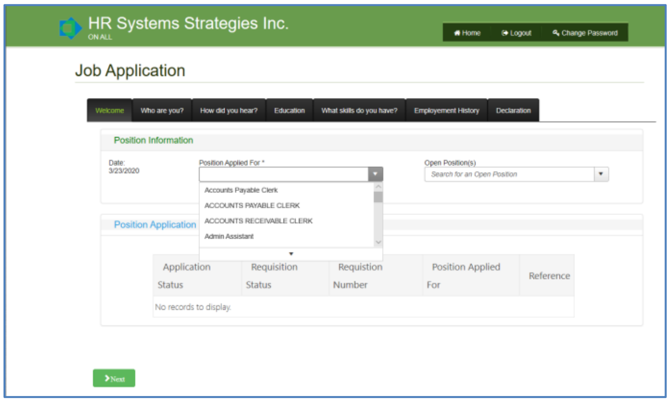
NOTE: The login credentials can be changed in the web.config file from last name to User ID and Password for those clients that use either the ESS or Timesheets modules. Contact info:HR support for details.

Step 1 Job Information

This screen provides the ability for the Applicant to apply for a specific position or an open requisition.

NOTE: If you prefer to accept applications for open requisitions only, you can set this restriction via the web.config file. Contact info:HR support for details.

Screen Layout



Positions Applied For – Displays all Active Positions in info:HR's Position Master.

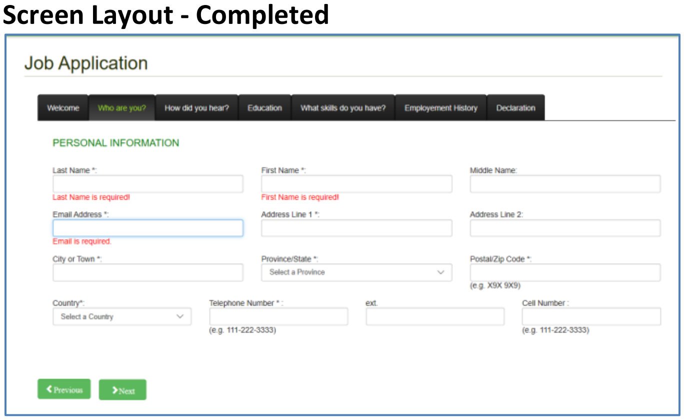
- This drop down can be hidden via the Application Form Defaults Screen in info:HR.

Open Positions - will display all Open Requisitions from the applicant tracking module.

Step 2 Personal Information

The Personal Information screen provides the ability for Applicants to enter personal information. Mandatory fields are indicated by an asterisk (*).

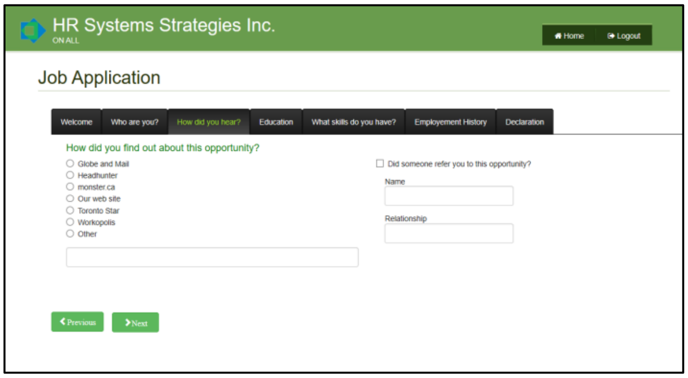
Screen Layout - Completed



- Applicants complete all the required fields.
- This screen is not required for current employees.

Step 3 Source of Opportunity

Screen Layout



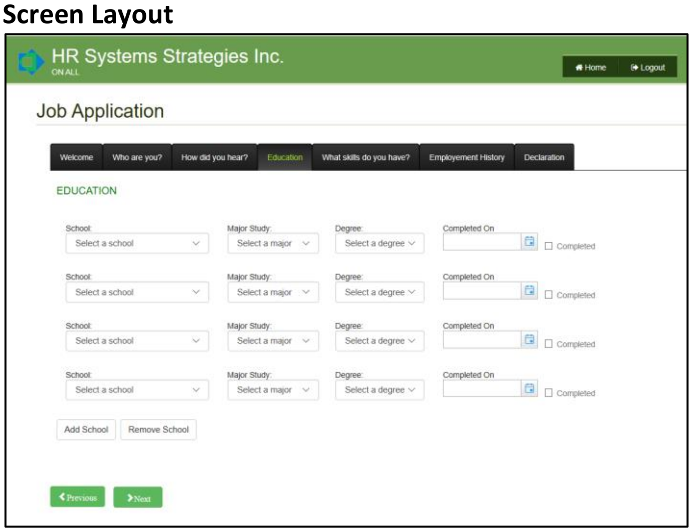
- Applicants may complete fields; this information is not required.

Radio button values display the Hire Code table. This table is located on the Status and Dates screen in info:HR and on the Demographics screen, field name Referral, in Applicant Tracking.

The referred-by information will populate fields on the Applicant Demographic screen under the Application Information heading in Applicant Tracking.

Step 4 Education

Screen Layout

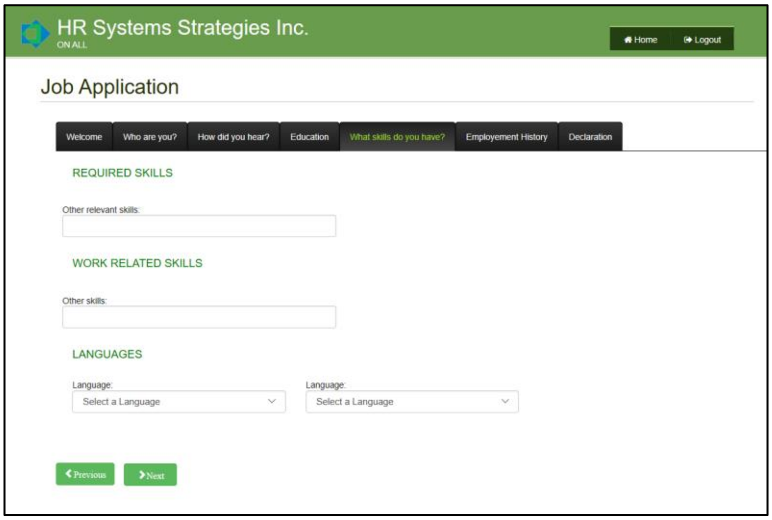


- Applicants enter their formal education.
    - This screen is auto-populated for current employees.

Fields on in this step on the web form are populated from the Continuing Education -> Formal Education code tables in info:HR.

Step 5 Skills

Screen Layout



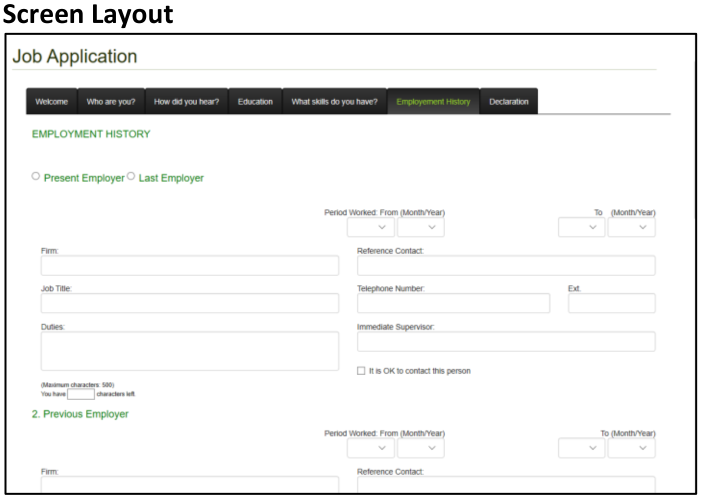
- Applicants complete the information; this information is not required.

Skills information is populated by the Skills data screen under the Position Menu. All Skills that are checked as Required will show under Required Skills all others will appear under Work Related Skills.

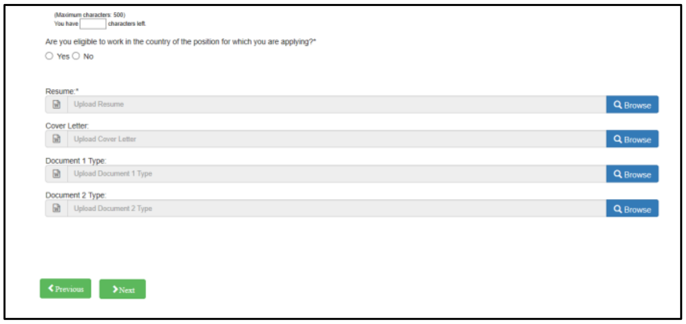
Languages are populated by the Language code table. This code table can be found under the Education/Skills menu in info:HR.

Step 6 Employment History

Screen Layout



Step 6 Employment History continued

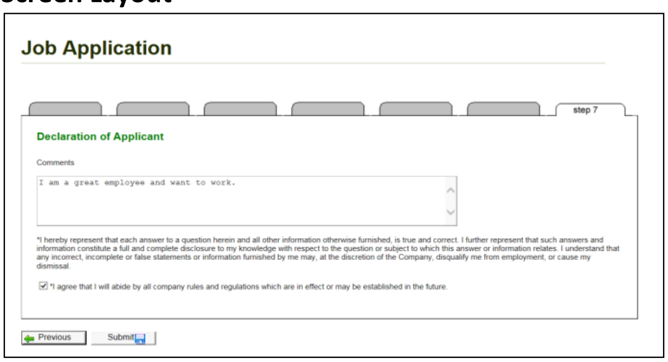


- Applicants may complete the appropriate information, whether they are a candidate or current applicant/employee. This information is not required.

The information in this screen populates the Resume screen in Applicant Tracking. The applicant's resume attachment can be found on the Status/Dates screen.

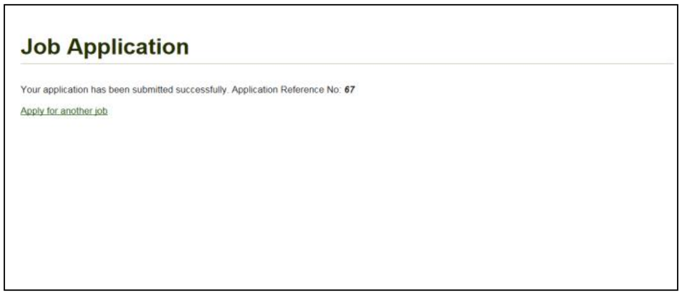
Step 7 Declaration

Screen Layout



- This section provides the ability for the applicant to add any additional comments and agree to a validation statement.
- The validation statement can be customized using the settings screen.

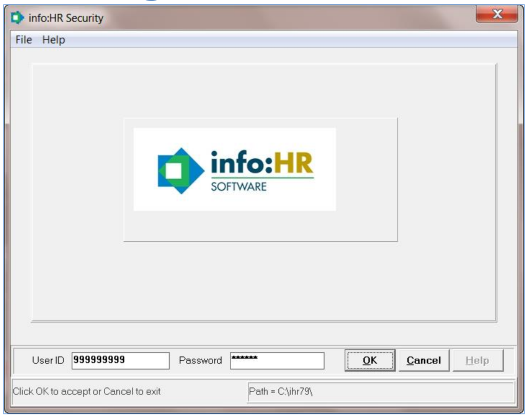
Completion Notification



- Applicants will receive an email referencing their applicant number.
- The system user may receive an email at this stage announcing a new application has been made. This is set via the Requisit'd By Email Address field on the requisition screen.

Getting Started

Initial Login Screen

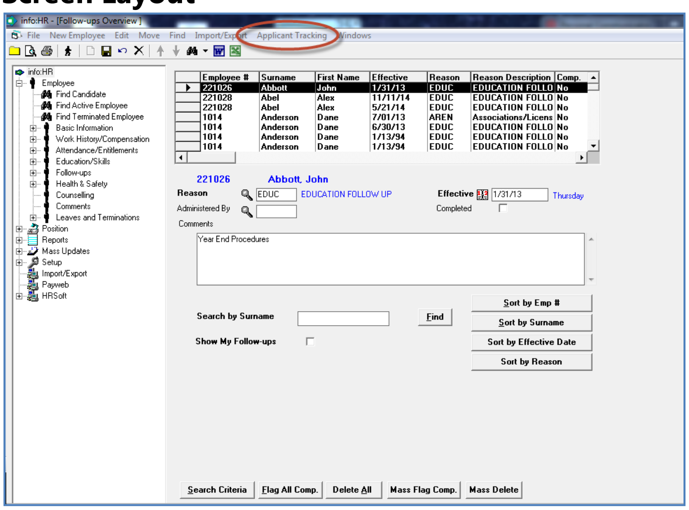


- To log in to info:HR enter your **User ID** and your **Password**.
- If info:HR is set up for single sign on, this screen will not appear. For single sign on to work, the info:HR user ID must be identical to the network ID.

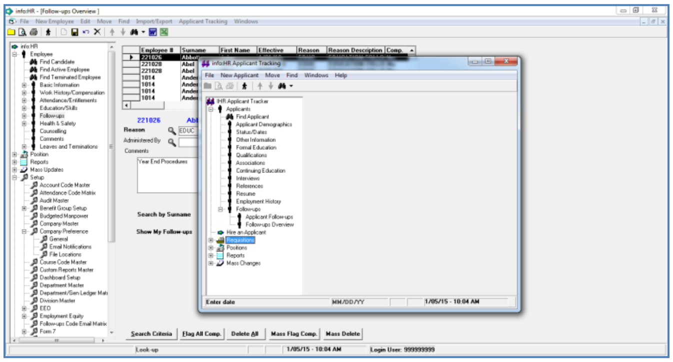
Accessing Applicant Tracking

From info:HR select **Applicant Tracking** from the top menu.

Screen Layout

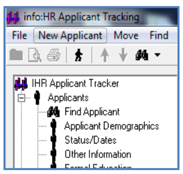


When this item has been clicked from any screen in info:HR, the Applicant Tracking module will open in a second window.

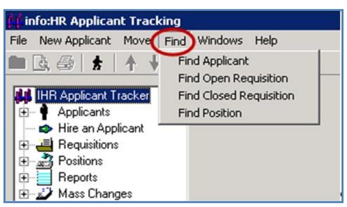


Find Applicant

There are two ways to search for an applicant:

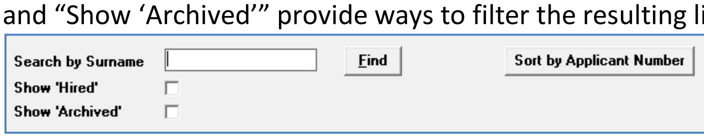


- Click on the **Find Applicant** from the main menu on the left of the screen.



- Click on the **Binoculars** icon  in the top menu bar and select **Find Applicant** from the drop down list.
- Clicking on any of the headings will sort the list by that column in ascending order. Double clicking will sort in descending order.
- Example: To view alphabetically by first name click on the first name heading. A single click will sort the list a – z, double clicking will sort the list z – a.

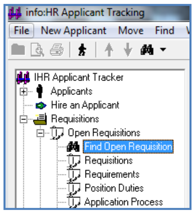
The default sort (display) order can be changed to “Sort by Applicant Number”. “show ‘Hired’” and “Show ‘Archived’” provide ways to filter the resulting list of applicants.

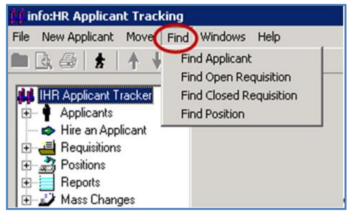


To select the applicant you can either double click on the name or click the select button once the name is highlighted.

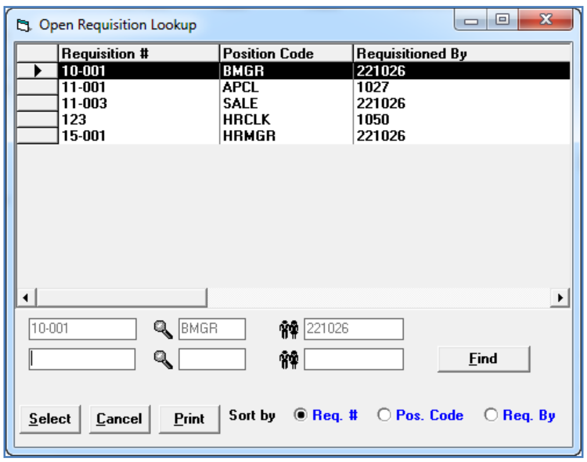
Find an Open Requisition

There are two ways to search for an Open Requisition:





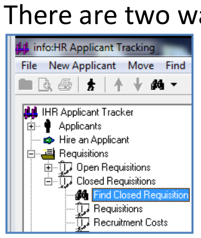
- Click on the **Find Open Requisition** from the main menu on the left of the screen. **Requisitions/Open Requisitions/Find Open Requisitions**
- Click on the binoculars icon in the top menu bar and select **Find Open Requisition** from the drop down list.

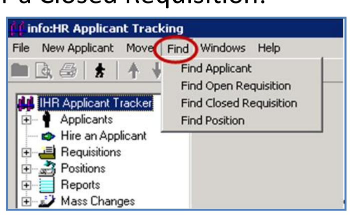


This lookup provides the ability to sort by Requisition #, Position Code or the person who made the Requisition.

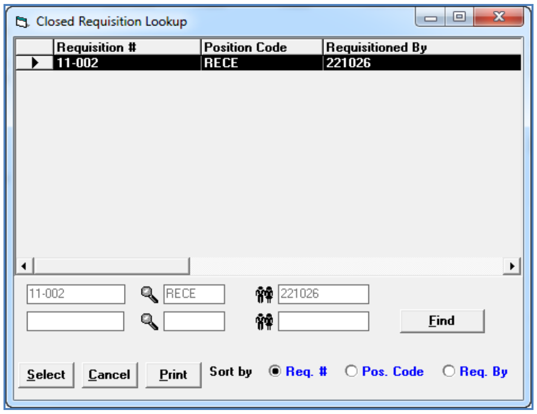
Find a Closed Requisition

There are two ways to search for a Closed Requisition:





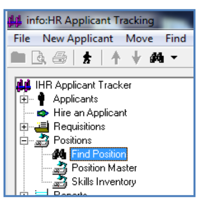
- Click on the **Find Closed Requisition** from the main menu on the left of the screen. **Requisitions/Closed Requisitions/Find Closed Requisitions**
- Click on the binoculars icon in the top menu bar and select **Find Closed Requisition** from the drop down list.

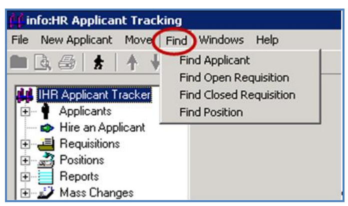


This lookup provides the ability to sort by Requisition #, Position Code or the person who made the Requisition.

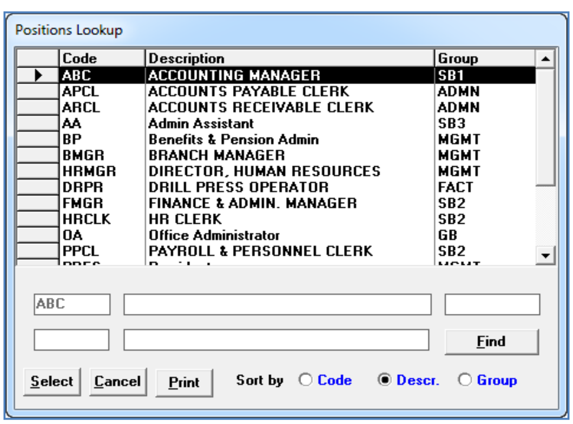
Find a Position

There are two ways to search for a Position:





- Click on the Find Position from the main menu on the left of the screen.
- Click on the **Binoculars**  icon in the top menu bar and select **Find Position** from the drop down list.

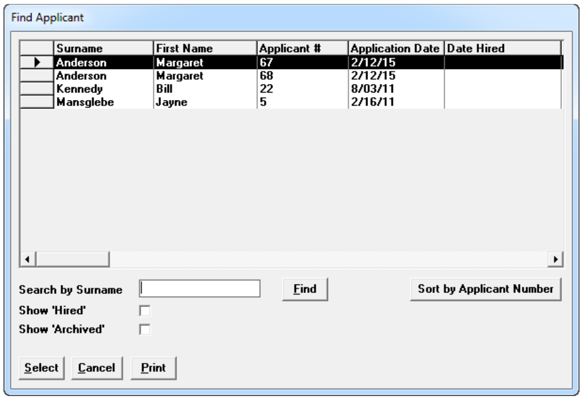


This lookup provides the ability to sort by Position Code, Position Description or Position Group.

Applicants

Find an Applicant

Use this look-up to sort and find Applicants in the system.



To find a specific Applicant, type the surname, or part of, into the Search By field, then select "**Find**".

- For example: If you type "S" into the Search By field, it will take you to where the first "S" Surname begins. If you type in "Smith," it will take you to the first occurrence of "Smith."

To filter the Employee list:

Clicking on any of the headings will sort the list by that column in ascending order. Double clicking will sort in descending order.

- Example: To view alphabetically by first name click on the First Name heading. A single click will sort the list a – z, double clicking will sort the list z – a.

- **Show "Hired"** - Will display only applicants who have been hired.

Show "Archived" - Will display only applicants who have been archived.

To select the employee you can either double click on the row or click on the **Select** 

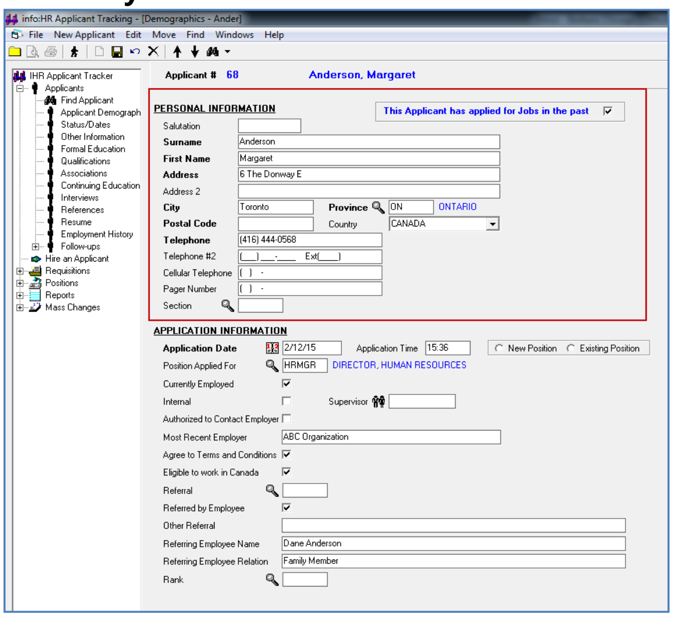
button once the name is highlighted.

Applicant Demographics

This is the first screen populated by the Web Form; it is also the first screen completed when entering a new Applicant. There are two sections to this screen. They are:

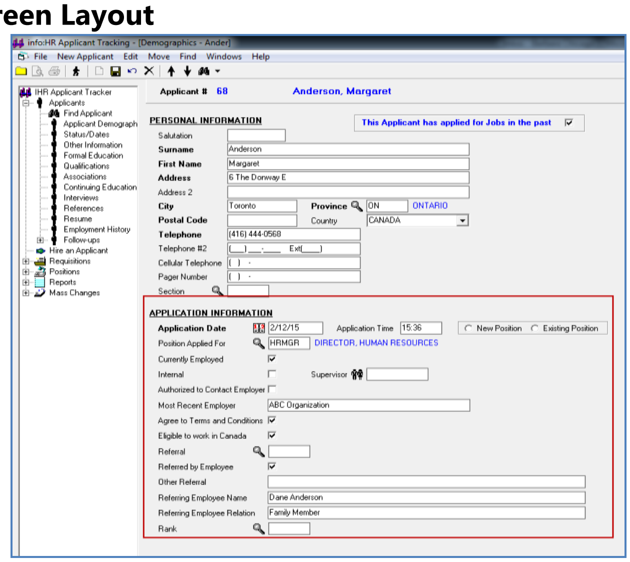
1. **Personal Information:** Tombstone information, bolded fields are mandatory. The information in this section contains all of the applicant's personal information. This information can be populated by the Web Form or by entering information in this screen. The information in this screen is transferred to info:HR when the employee is hired, populating the Employee Demographics screen.

Screen Layout



2. **Application Information:** Information contained in this section is populated by the Position Requisition and the Web Form. Bolded information is mandatory.

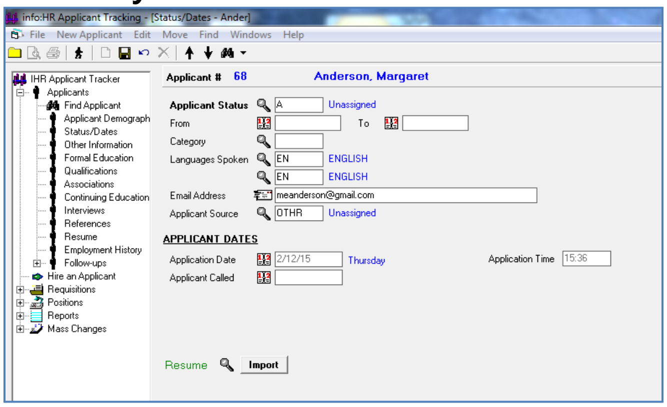
Screen Layout



Status/Dates

This is this screen stores the information related to the status of the Applicant. This screen is automatically populated from information entered into the Web Form by the Applicant.

Screen Layout



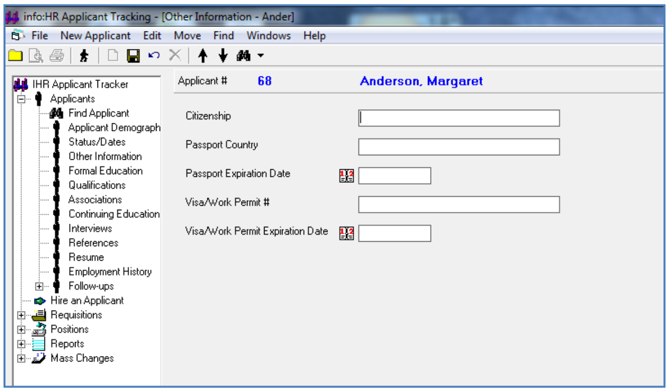
Information Validation

Field	Source	Purpose
Application Status	System	Assign the status of an applicant.
From – To Dates	User	Assign a date range to the status.
Category	User	Assign the category of the applicant.
Languages Spoken	Web Form	Enter the languages spoken by the applicant.
Email Address	Web Form	Applicant e-mail address.
Applicant Source	Web Form	Provides the ability to enter a code for where the applicant learned of the posting.
Application Date	System	This date is populated when the application was received.
Application Time	System	This time is populated when the application was received.
Applicant Called	User	Provides the ability to record the date the applicant was called.

Buttons	Function
Import	Provides the ability to import the applicant's resume. This import will also, populated from the Web Form when the applicant attaches a resume through the application process.

Other Information

Provides an area to track Passport, Visa/Work Permit and their expiry Dates.

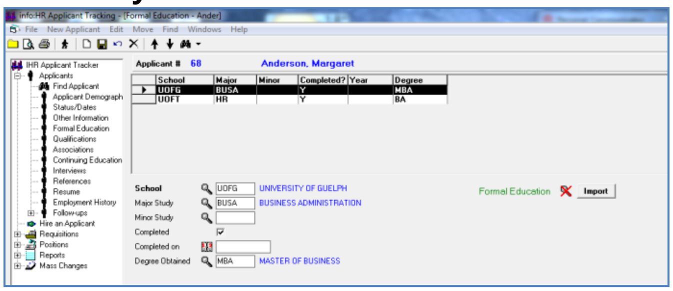


Complete as much information as required, then click **Save** .

Formal Education

This screen provides the ability to enter information related to the applicant's Formal Education. This screen is populated by the applicant through the application process or it can be updated by the user after the application has been received.

Screen Layout



- To enter a new formal education record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

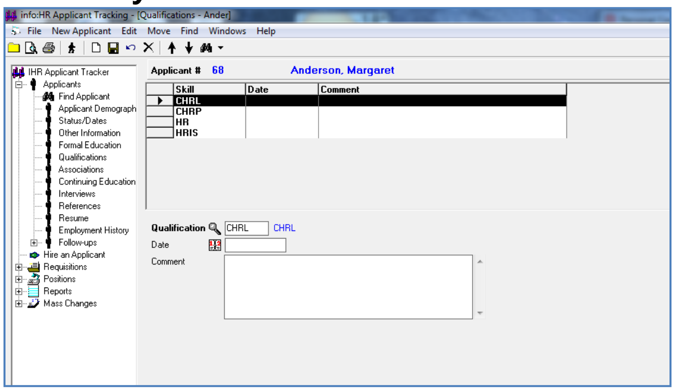
Field	Source	Purpose
School	Web Form/User	Provides the ability to record an Institution.
Major Study	Web Form/User	Provides the ability to record a major course of study.
Minor Study	Web Form/User	Provides the ability to record a minor course of study.
Completed Check	Web Form/User	Provides the ability to check if the program was completed.
Completed On	Web Form/User	Provides the ability to record a completed date.
Degree Obtained	Web Form/User	Provides the ability to record the degree earned.

Buttons	Function
Import	Provides the ability to import a document related to the Formal Education records.

Qualifications

This screen provides the ability to enter skills qualifications for the applicant. This screen is populated by the Web Form. This information is also transferred to the Skills screen in info:HR when the applicant is hired.

Screen Layout



- To enter a new skill record, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the delete icon button to delete the record.

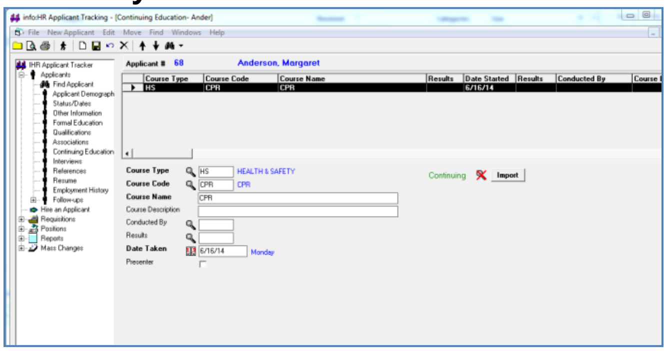
Information Validation

Field	Source	Purpose
Qualification	Web Form/info:HR	Provides the ability to record Skills, related to or required for the position, possessed by the applicant.
Date	User	Provides the ability to record a date associated with the skill.
Comments	User	Provides the ability to record comments for the related to the record.

Continuing Education

This screen provides the ability to store Continuing Education records for the applicant. This screen is updated by the user. The information in this screen is transferred to the Continuing Education screen in info:HR when the applicant is hired.

Screen Layout



- To enter a new continuing education record, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

Information Validation

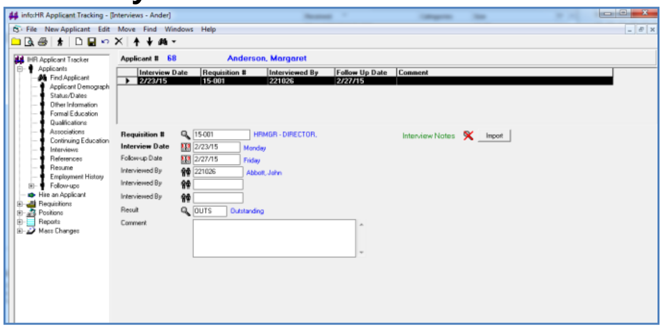
Field	Source	Purpose
Course Type	User	Provides the ability to record a Course Type Code.
Course Code	User	Provides the ability to record a Course Code.
Course Name	User	Provides the ability to record a Course Name.
Course Description	User	Provides the ability to record a Course Description.
Conducted By	User	Provides the ability to record a conducted by Code.
Results	User	Provides the ability to record a Result.
Date Taken	User	Provides the ability to record the date the course was completed.
Presenter	User	Check if the applicant was the presenter for the course.

Buttons	Function
Import	Provides the ability to import a document related to the Continuing Education records.

Interviews

This screen provides the ability to track summary information and comments related to interviews conducted with the applicant.

Screen Layout



- To enter a new interview record, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

Information Validation

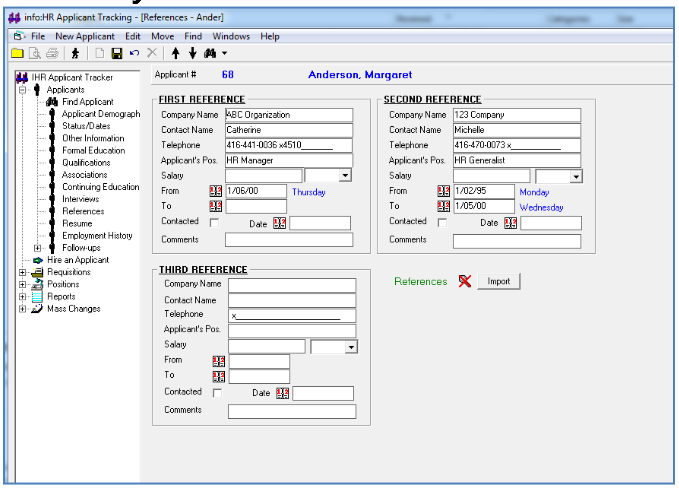
Field	Source	Purpose
Requisition #	User	Provides the ability to attach a requisition number to the interview.
Interview Date	User	Provides the ability to record the interview date.
Follow Up Date	User	Provides the ability to enter a follow up date, generating a follow up record.
Interviewed By	User	Provides the ability to record up to 3 Interviewers.
Result	User	Provides the ability to enter an interview result.
Comment	User	Provides the ability to record comments or Notes.

Buttons	Function
Import	Provides the ability to import a document related to the Interview records.

References

This screen provides the ability to record up to three references and information related to reference contacts.

Screen Layout



Complete screens as desired.

- To make changes, click in the field and type. Click on the **Save** icon button to safe the changes.

Information Validation

Field	Source	Purpose
Company Name	Web Form/User	Provides the ability to record the company the reference works for.
Contact Name	Web Form/User	Provides the ability to record the contact name of the reference.
Telephone	Web Form/User	Provides the ability to record the contact telephone number.
Applicant Pos.	Web Form/User	Provides the ability to record the position held by the applicant.
Salary	Web Form/User	Provides the ability to record the applicant's Salary with the organization.
From	Web Form/User	Provides the ability to record the date the applicant started with the organization.
To	Web Form/User	Provides the ability to record the date the applicant left the organization.

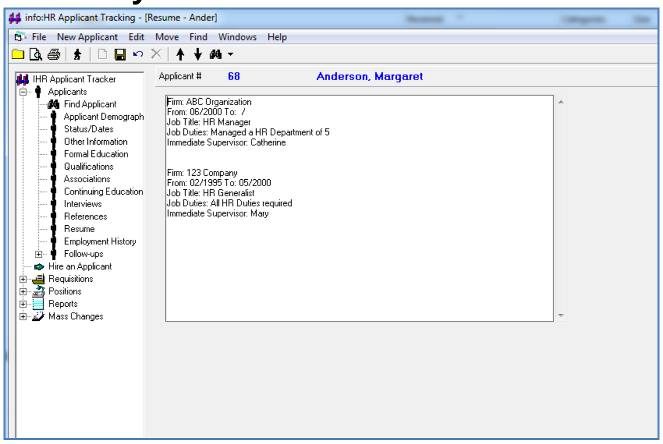
Contacted	User	Provides the ability to check that the contact was reached.
Date	User	Provides the ability to record the contact date.
Comments	User	Provides the ability to record comments.

Buttons	Function
Import	Provides the ability to import a document related to the Reference records.

Resume

This screen provides a view of the applicant's Employment History from the Web Form.

Screen Layout



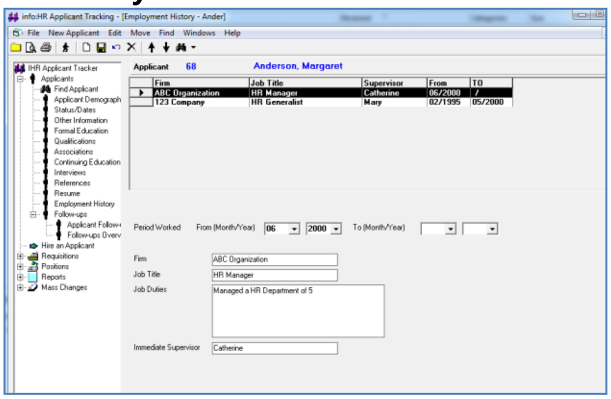
The information in this screen is populated from the Employment History screen in the Web Form, if any was entered. This information may be changed by the user.

- To make changes, click in the field and type. Click on the **Save** icon button to safe the changes.

Employment History

This screen is populated by the Employment History screen from the Web Form. The information is presented in a grid box format. Records may be added by the user if required.

Screen Layout



- To enter a new Employment History Record, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the Delete icon button to delete the record.

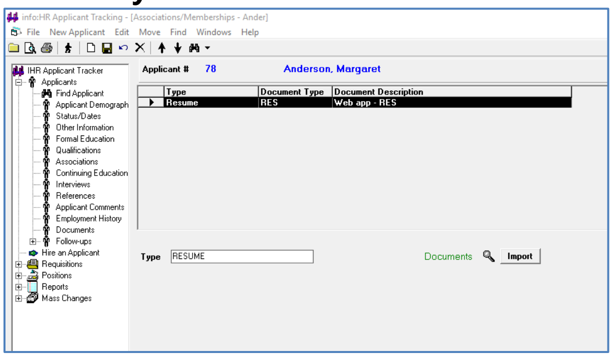
Information Validation

Field	Source	Purpose
Period Worked	Web Form	Provides the ability to record the month and year of the start and end of employment.
Firm	Web Form	Provides the ability to record the organization the applicant was employed by.
Job Title	Web Form	Provides the ability to record the position held by the applicant.
Duties	Web Form	Provides the ability to record the duties performed by the applicant.
Immediate Supervisor	Web Form	Provides the ability to record the applicant's Supervisors name.

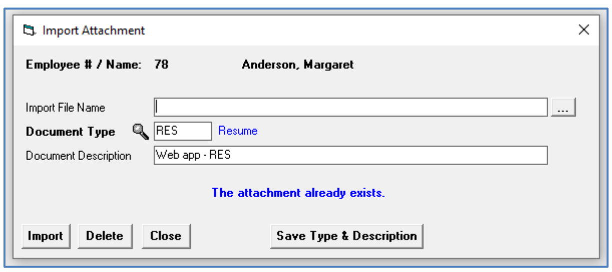
Documents

The Document screen provides the ability to view any documents uploaded by the applicant.

Screen Layout



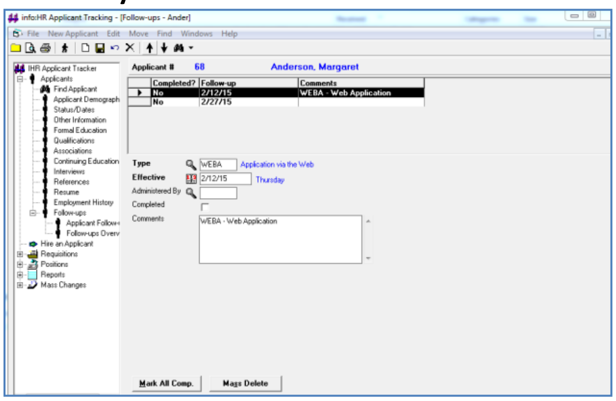
- Select the document from the list.
- Click the **Magnify Glass**.



Documents may also imported by the user.

- Click the **Import** Import button.
- Click the **Browse** ... button to search for the file.
- Assign a **Document Type**.
- Enter a **Document Description**.
- Click **Import** Import button.

Follow-ups
Applicant Follow-ups
The Applicant Follow-ups screen is a history of all follow-ups that are specific to each applicant. Many of these follow-ups are automatically generated from the system by entering dates on items such as Interview Follow-up. This gives the status of each follow-up, listing whether it is completed or not. Additional follow-ups can be entered in this screen. The security on this screen is specific to each Follow-up Reason Code. You can allow employees or supervisors to see some follow-ups, but not all. Refer to the Setup User Manual, Security Master for more details.

Screen Layout


- To enter a new follow up record, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

Information Validation
Field	Source	Purpose
Type	App Track/User	Enter the Reason or click on the magnify glass to select the code from the look up.
Effective	App Track/User	Date the Follow-up is due.
Administered By	App Track/User	Enter the Admin By or click on the magnify glass to select the code from the look up. By using this field, you can assign Follow-ups to a particular staff member by assigning them an Admin by code.
Completed	User	When the Follow-up is completed, check this box. Competed Follow-up records will be hidden in the Follow-up Overview screen.
Comments	User	Enter as necessary.

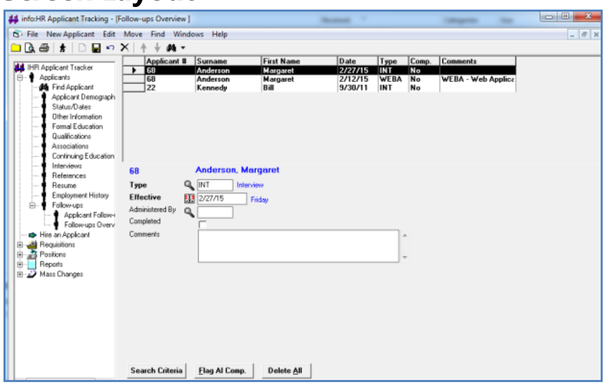
Follow-ups Overview

The Follow-up Overview screen can be considered a to-do list. Follow-ups displayed are based on the **Search Criteria** saved for the local computer. Individual computers may have different search criteria. Only incomplete Follow-Ups or Follow-Ups coming due within 'x' days are displayed.

By default, Follow-ups are displayed by employee's last name only. The sort order can be changed by clicking on any of the column headings.

The security on this screen is specific to each Follow-up Reason Code. You can allow employees or supervisors to see some follow-ups, but not all. Refer to the *Setup User Manual, Security Master* for more details.

Screen Layout



- To enter a new follow up record, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

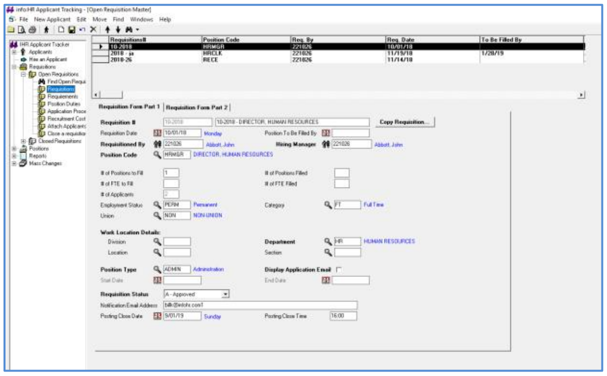
Buttons	Function
Search Criteria	Defines when this screen is displayed and what Follow-Ups will appear in the display.
Flag All Complete	Will mark all Follow-Ups as complete and remove them form the Overview Screen.
Delete All	Will delete all Follow-Ups displayed.

Requisitions

Open Requisitions

Requisition Form Part 1

This screen is used to record a requisition for a position to be filled.



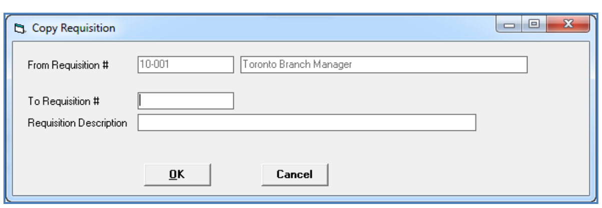
- To enter a new requisition, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

Information Validation Requisition Part 1

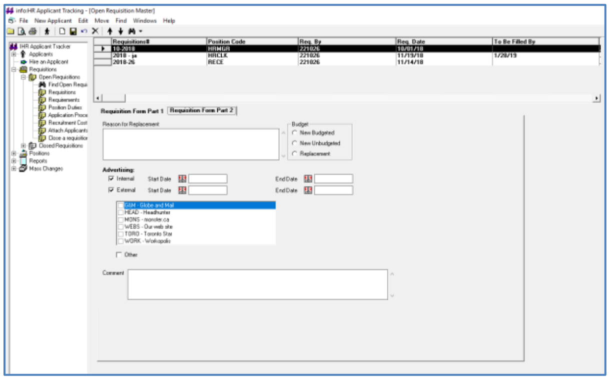
Field	Source	Purpose
Requisition #	User	Assign a number and an option description to the requisition.
Job Title	User	Enter the job title.
Requisition Date	User	Enter the requisition date.
Position To Be Filled By	User	Enter the date the position is to be filled by.
Requested By	User	Enter the employee number of the person who is requesting the requisition.
Hiring Manager	User	Enter the employee number of the Department Manager
Position Code	User	Select the position code.
# of Positions to Fill		Enter the number of open positions.
# of positions Filled	System	Displays the number of employees already filled.
# of FTE to Fill	User	Enter the number of FTE to be filled.
# of FTE Filled	System	Displays the number of FTE already hired.

# of Applicants	System	Displays the number of applications associated with the requisition.
Employment Status	User	Enter an Employment Status code. This will be transferred to info:HR upon hire.
Category	User	Enter a Category code.
Union	User	Enter a Union code
Work Location Details		
Division	User	Enter a Division.
Department		Enter a Department.
Location		Enter a Location.
Section		Enter a section.
Position type	User	Enter a Position Type code.
Display Application Email		Displays the contents of the email to be sent to the applicant.
Requisition Status	User	Select the requisition status code.
Notification Email Address		Enter the Email address of the people to be notified when an application is received.
Posting Close Date	User	Enter a posting close date.
Posting Close Time	User	Enter a posting close time.

Buttons	Function
Copy Requisition	This button can be used to copy an existing requisition, enabling the user to assign a new requisition number.



Requisition Form Part 2



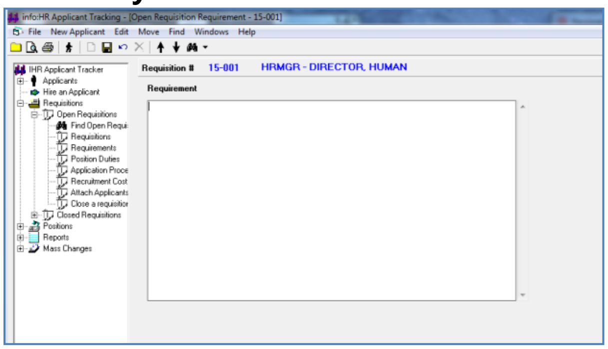
Information Validation Requisition Part 2

Field	Source	Purpose
Reason for Placement	User	Provides the ability to enter detailed notes regarding the reason for posting.
Budget	User	Provides the ability to select a reason.
Advertising		
Internal	User	Provides the ability to select how the job should be posted.
Start Date	User	Provides the ability to enter an internal post start date.
End Date	User	Provides the ability to enter an internal post end date.
External	User	Provides the ability to select how the job should be posted.
Start Date	User	Provides the ability to enter an external post start date.
End Date	User	Provides the ability to enter an external post end date.
Other	User	Provides the ability to select other posting places.
Comments	User	Provides the ability to enter additional comments.

Requirements

This screen may be used to document any specific requirements related to the Open Requisition. This is a free form notes screen and all notes are associated with one requisition only.

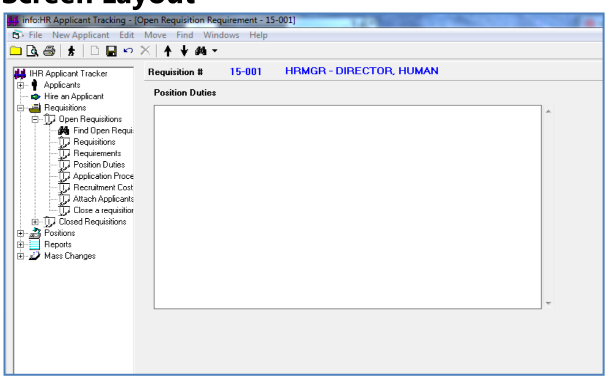
Screen Layout



Position Duties

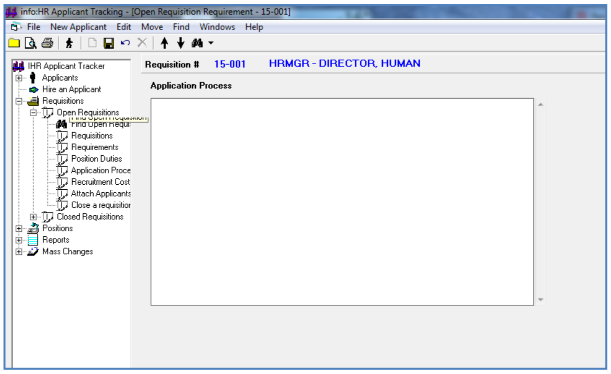
This screen may be used to document any specific Position Duties related to the Open Requisition. This is a free form notes screen and all notes are associated with one requisition only.

Screen Layout



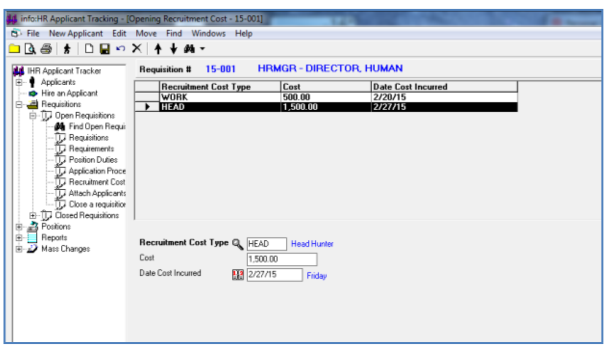
Application Process

This screen may be used to document any specific Processes related to the Open Requisition. This is a free form notes screen and all notes are associated with one requisition only.



Recruitment Costs

The purpose of this screen is to track recruitment costs associated with the requisition.



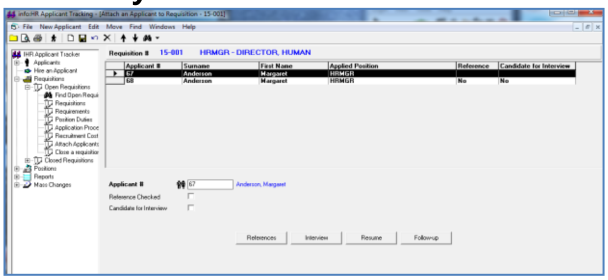
- To enter a new recruitment cost record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.
-

Field	Purpose
Recruitment Cost Type	This field provides the ability to store a cost type code.
Cost	This field provides the ability to store a cost amount in dollars.
Date Cost Incurred	This field provides the ability to enter a date associated with the cost.

Attach Applicants to Requisition

Applicants may apply for a position for which there is no open requisition. This screen provides the ability to attach the applicant to a desired requisition. This screen provides the ability to view the list of applicants and quickly review information on the applicant.

Screen Layout



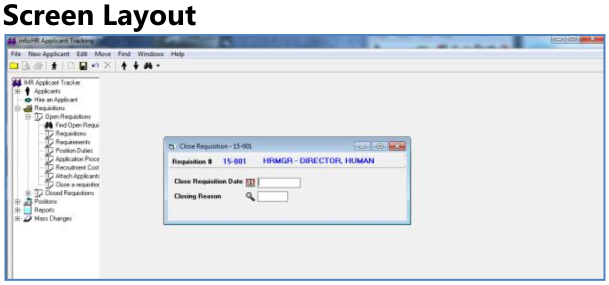
- To attach an applicant to the requisition, click the **New Record** button, then select the applicant number from the applicant lookup.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

Button	Purpose
References	When clicked the system will display the References screen.
Interview	When clicked the system will display the Interview screen.
Resume	When clicked the system will display the Resume screen.
Follow-Up	When clicked the system will display the Follow-Up screen.

Close a Requisition

Use this function to close a requisition.

Screen Layout

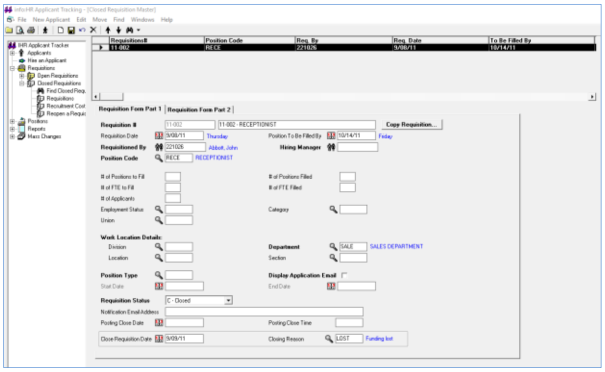


- Select the **Date**.
- Select the requisition **Closing Reason** from the lookup.

Closed Requisitions

Requisitions

The purpose of this screen is to view previous requisitions that have been closed. Requisitions may be changed after they have been closed.



- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

Information Validation

See the Requisitions screen in the Open Requisitions section.

Field	Source	Purpose
Close Requisition Date	User	The date the requisition was closed.
Closing Reason	User	The reason the requisition was closed.

Buttons

See the Requisitions screen in the Open Requisitions section.

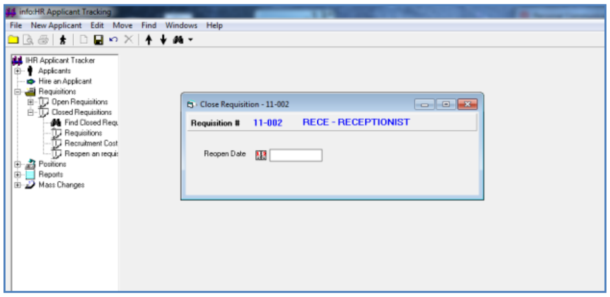
Recruitment Costs

The purpose of this screen is to track recruitment costs associated with a closed requisition.

- To enter a new recruitment cost record, click the **New Record** icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the **Save** icon button or the **Delete** icon button to delete the record.

Reopen a Requisition

This screen provides the ability to reopen a closed requisition.

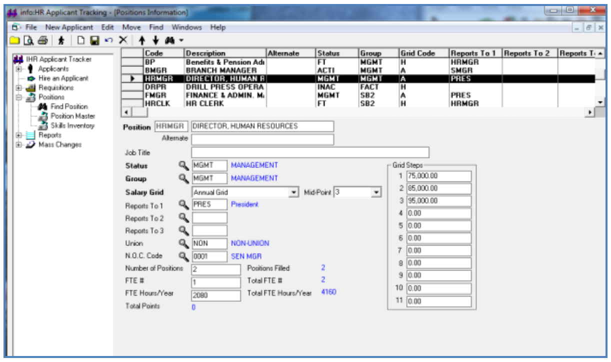


- Once the closed requisition has been selected, to reopen click the "**Reopen a Requisition**" menu item. Enter the date the requisition is to be opened.

Positions

Position Master

This screen provides the ability to view the position master from the Applicant Tracking module. Any changes made in this screen will be reflected in the Position Master in info:HR.

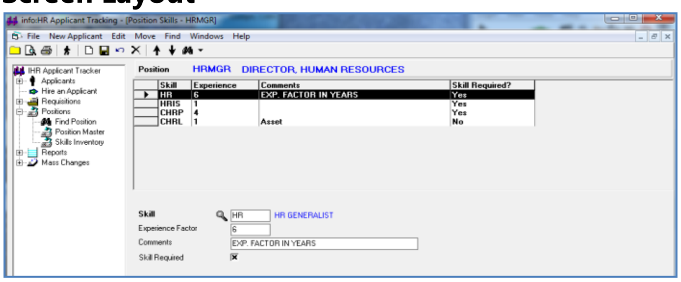


Please refer to the Position Master Reference Manual for more information.

Skills Inventory

This screen is used to assign skill records to the position. These records will appear on the web form as Required Skills or Work Related Skills. Changes made it this screen will be reflected in info:HR.

Screen Layout



- To enter a new skill record, click the new record icon button.
- To make changes to an existing record select the record from the grid box at the top of the screen by clicking on the line. Click on the save icon button or the delete icon button to delete the record.

Information Validation

Field	Source	Purpose
Skill	User	Enter a Skill Code.
Experience Factor	User	Enter an experience factor value.
Comments	User	Enter a Comment.
Skill Required	User	When this box is checked the skill will appear in the webform as a required skill; when the box remains unchecked the sill will fall under work related skills.

Reports

Selection Criteria

The Selection Criteria provides the opportunity to filter the information you wish to show on the report. For example, you may wish to run a report for a specific employee, or for all the employees in a specific department, or for activities that have occurred or will occur in a specified time period. By specifying those values in the Selection Criteria, a report will be generated excluding all other conditions.

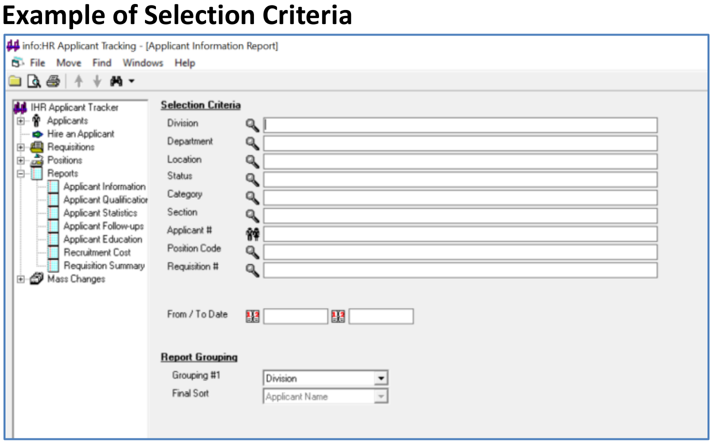
Multiple parameters can be entered in the Selection Criteria. For example, you may wish to run a report for all FT (full time) employees in a specific Union with activities occurring in the next 3 months. The three parameters would need to be entered in the Selection Criteria.

To look up a table value, double-click in the box where the data would be entered or single-click on the **Magnify Glass** ( ) located to the left of the data entry box.

On lookups where a long line appears, double-click on the icon and hold down the "Ctrl" key to select multiple entries, e.g., Employee Number lookup. Once you have selected all the entries, click on the Select button to insert the highlighted items into the selection criteria. Another method of selecting multiple employees is to just type in their employee number. Use a comma to delimit between employees.

Finally, some reports can be generated in either Detail or Summary format.

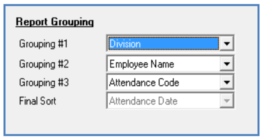
Example of Selection Criteria



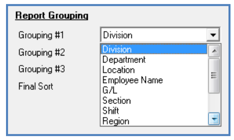
Groupings

The Report Grouping options allow you to sort the information selected on the report.

Report Grouping



Report Group Drop down



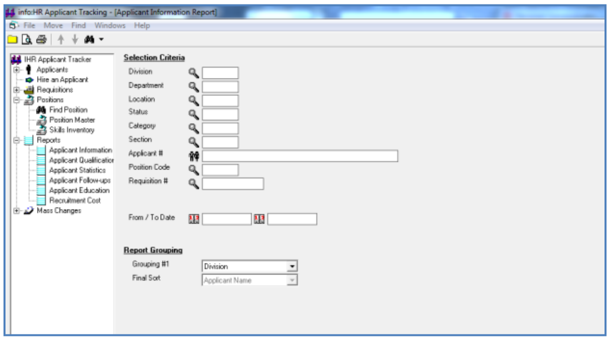
Grouping #1 is the major sort criteria. Grouping #1 controls totalling, page breaks, and headings. For example, if a report's Grouping #1 is Department, and you have asked for the report to be generated for every Department by leaving the Department option blank, the information will be totalled for each Department and the report will begin a new page for each Department with a heading. If Grouping #1 is (none) or blank, then page breaks will occur only as they happen naturally. If Grouping #1 is (none), then many reports will begin with the first employee in alphabetical order and print the report for all employees selected.

All other Groupings are secondary sorts. From the example screen in the Selection Criteria section above, if the Grouping #1 is Employee Name, Grouping #2 is Attendance Code, and Grouping #3 is (none), then the report would be printed by employee name in alphabetical order, and within each employee by attendance reason in alphabetical order, and within each attendance reason by descending Attendance Date. Page breaks (other than natural ones) would occur by employee so that you could give each employee their own report.

With some exceptions, the Final Sort is determined by info:HR.

Applicant Information

This report is used to view a one-page summary of the applicants' personal information as well as actions taken on the application such as interviews.



Sample Report

Date: 3/02/15
Time: 8:41:32 AM

HR Systems Strategies Inc.
Applicant Information

Page: 4
RAINFO

Applicant Number / Name : 67 **Anderson, Margaret**

Address 1 :	6 The Donway E	Current Employee # :	
Address 2 :		Other Referral :	
City :	Toronto	Agree to terms and conditions :	Yes
Province :	ON	Most Recent Employer :	ABC Organization
Country :	CANADA		
Date Of Birth :			
Email :	meanderson@gmail.com		
Postal Code :			
Home Phone :	4164440568		
Business Phone :			
Cell Phone :			
Pager Number :			
Referred by Employee :	Yes		
Referring Employee Name :	Dane Anderson		
Referring Employee Relation :	Family Member		
Eligible to work in Country:	Yes		
Hire Code :	OTHR		
Application Date :	2/12/15		
Called :			
Internal :	No		
Employed :	Yes		
Authorized to Contact Employer :	No		
Current Position :			
From :			
To :			
Hired :			
Supervisor :			

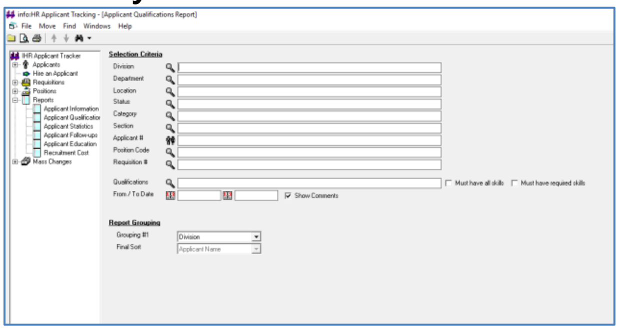
Jobs Applied For
DIRECTOR, HUMAN RESOURCES

Interview Date	Interviewed By	Interviewed By	Interviewed By	Result	Comments

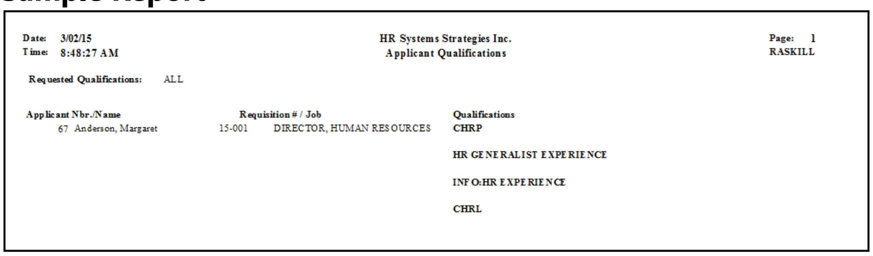
Applicant Qualifications

This report is used to view a list of applicant qualifications. The report can be filtered by requesting that applicants match either all of or any of the specified qualifications.

Screen Layout



Sample Report



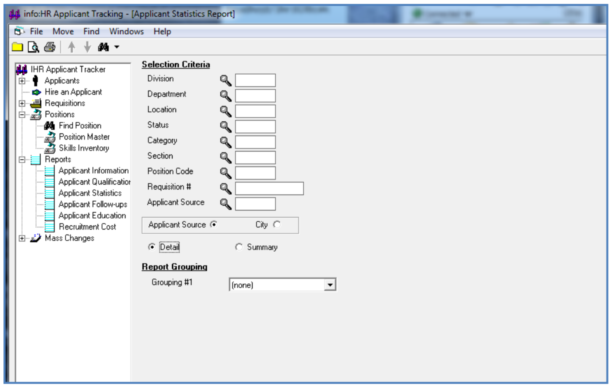
Date: 3/02/15 HR Systems Strategies Inc. Page: 1
Time: 8:48:27 AM Applicant Qualifications RASKILL

Requested Qualifications: ALL

Applicant Nbr./Name	Requisition # / Job		Qualifications
67 Anderson, Margaret	15-001	DIRECTOR, HUMAN RESOURCES	CHRP
			HR GENERALIST EXPERIENCE
			INFO:HR EXPERIENCE
			CHRL

Applicant Statistics

This report is used to view statistics of the application either by applicant source or by city.



Sample Report – Applicant Source Detailed

Date: Apr 17/15
Time: 10:05:56 AM

Applicant Statistics Report by Applicant Source

Page: 1
RASTATSR

Applicant Nbr./Name		Applicant Source		Requisition #	Position Applied For
68	green, george			10-001	BMGR
72	Anderson, Dane				BMGR
77	Red, Randy			10-001	BMGR
82	Armstrong, Bob			11-001	APCL
	Total of		**4**	**0.27%**	
22	Kennedy, Bill	monster.ca			BMGR
69	black, brian	monster.ca		10-001	BMGR
70	black, bobby	monster.ca		10-001	BMGR
73	purple, paul	monster.ca		10-001	BMGR
	Total of monster.ca		**4**	**0.27%**	
71	green, geoff	Our web site		10-001	BMGR
74	Oscar, Orange	Our web site		10-001	BMGR
76	blue, brad	Our web site		10-001	BMGR
78	yellow, yogi	Our web site		10-001	BMGR
83	smythe, sam	Our web site		10-001	BMGR
85	Jack, blueboy	Our web site		10-001	BMGR
86	Armstrong, Bob	Our web site		10-001	BMGR
	Total of Our web site		**7**	**0.47%**	

Grand Total Applicants 15

Sample Report - Source Summary

Date: Apr 17/15
Time: 10:11:02 AM

Applicant Statistics Report by Applicant Source

Page: 1
RASTATSR

Total of	**4**	**0.27%**
Total of monster.ca	**4**	**0.27%**
Total of Our web site	**7**	**0.47%**

Grand Total Applicants 15

Sample Report – City Detailed

Date: Apr 17/15
Time: 10:15:05 AM

Applicant Statistics Report by City

Page: 1
RASTATCT

Applicant Nbr./Name		Province	City	Requisition #	Position Applied For
73	purple, paul	ON	Aurora	10-001	BMGR
Total of	Aurora		1	0.07%	
78	yellow, yogi	ON	Ayr	10-001	BMGR
Total of	Ayr		1	0.07%	
85	Jack, blueboy	BC	barrie	10-001	BMGR
Total of	barrie		1	0.07%	
74	Oscar, Orange	ON	Burford	10-001	BMGR
Total of	Burford		1	0.07%	
71	green, geoff	ON	Greenville	10-001	BMGR
Total of	Greenville		1	0.07%	
76	blue, brad	ON	LaSalle	10-001	BMGR
Total of	LaSalle		1	0.07%	
72	Anderson, Dane	ON	LONDON		BMGR
Total of	LONDON		1	0.07%	
77	Red, Randy	ON	London	10-001	BMGR
83	smythe, sam	BC	London	10-001	BMGR
Total of	London		2	0.13%	
69	black, brian	ON	timmins	10-001	BMGR
Total of	timmins		1	0.07%	
22	Kennedy, Bill	ON	toronto		BMGR
68	green, george	ON	toronto	10-001	BMGR
70	black, bobby	ON	toronto	10-001	BMGR
Total of	toronto		3	0.20%	
82	Armstrong, Bob	ON	TORONTO	11-001	APCL
86	Armstrong, Bob	ON	TORONTO	10-001	BMGR
Total of	TORONTO		2	0.13%	
		Grand Total Applicants	15		

Sample Report – City Summary

Date: Apr 17/15
Time: 10:17:14 AM

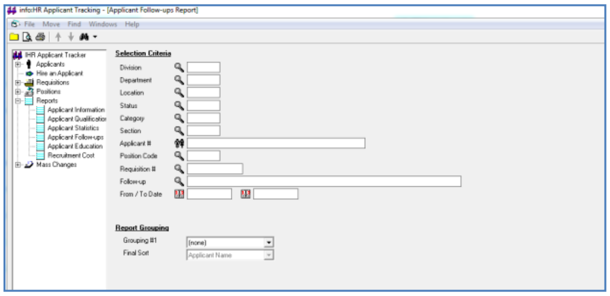
Applicant Statistics Report by City

Page: 1
RASTATCT

Total of	Aurora	1	0.07%
Total of	Ayr	1	0.07%
Total of	barrie	1	0.07%
Total of	Burford	1	0.07%
Total of	Greenville	1	0.07%
Total of	LaSalle	1	0.07%
Total of	LONDON	1	0.07%
Total of	London	2	0.13%
Total of	timmins	1	0.07%
Total of	toronto	3	0.20%
Total of	TORONTO	2	0.13%
	Grand Total Applicants	15	

Applicant Follow-ups

The purpose of this report is to view all Follow-up records in the system with the status of the follow-up and dates associated with it.



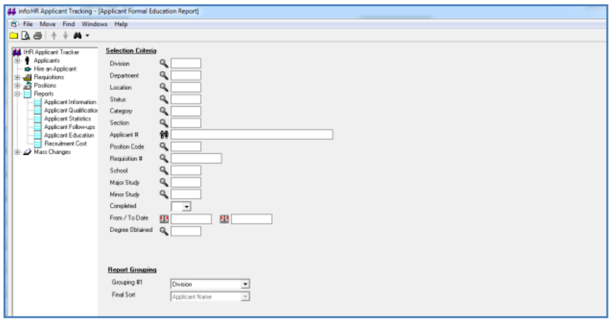
Sample Report

Date: 3/09/15　　HR Systems Strategies Inc.　　Page: 1
Time: 3:34:57 PM　　Follow-ups Report　　RAFOLLU1

Employee Name	Follow-up	Date	Completed
Anderson , Margaret	Application via the Web	2/12/15	Yes
Comments: WEBA - Web Application			
	Application via the Web	2/12/15	No
Comments: WEBA - Web Application			
	Interview	2/27/15	No
Comments:			
Kennedy , Bill	Application via the Web	8/03/11	Yes
Comments: WEBA - Web Application			
	Interview	9/30/11	No
Comments:			

Applicant Education

The purpose of this report is to view the applicant's education history.



Sample Report

Date: 3/09/15
Time: 3:53:54 PM

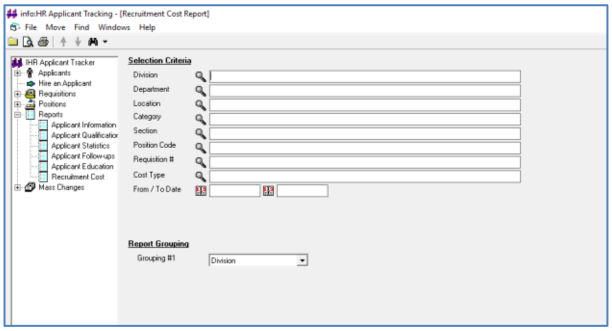
HR Systems Strategies Inc.
Formal Education Report

Page: 1
RAFORME1

Name	School	Major/Minor Study	Completed	Year	Degree Obtained
Anderson , Margaret	UNIVERSITY OF TORONTO	HUMAN RESOURCES	Y		BACHELOR OF ARTS
	UNIVERSITY OF GUELPH	BUSINESS ADMINISTRA	Y		MASTER OF BUSINESS AD
Anderson , Margaret	UNIVERSITY OF TORONTO	HUMAN RESOURCES	Y		BACHELOR OF ARTS
	UNIVERSITY OF GUELPH	BUSINESS ADMINISTRA	Y		MASTER OF BUSINESS AD

Recruitment Cost

The purpose of this report is to view the costs associated with recruiting for a position.



Sample Report

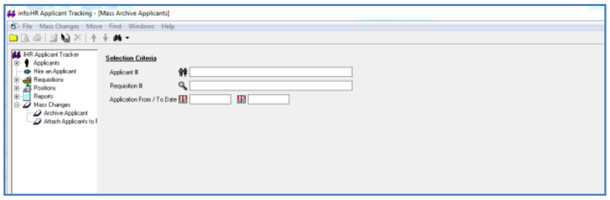
Date: Apr 17/15 **Page:** 1
Time: 10:28:09 AM **Recruitment Cost** RARCOST

Requisition #	Position	Type	Date Incurred	Cost
10-001	BRANCH MANAGER	Workopolis	Jan 2/12	$250.00
123	HR CLERK	Globe & Mail ad	Sep 4/06	$500.00
	HR CLERK	Referral bonus	Jul 27/09	$250.00
		Grand Total Cost		**$1,000.00**

Mass Changes

Archive Applicants

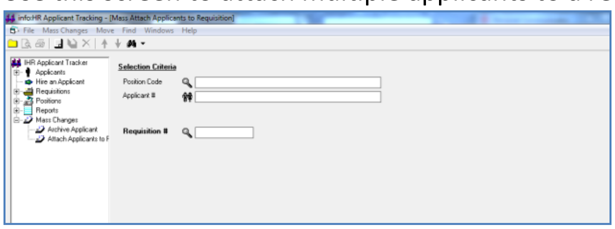
Use this screen to archive applicants by applicant number, requisition number or date range. Applicants will remain in the system under Archived Applicant.



- Select the group of employees or the date range and click the mass update button.

Attach Applicants to Requisition

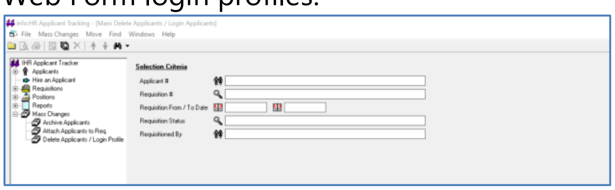
Use this screen to attach multiple applicants to a requisition.



- Enter the applicants and select the open requisition, then click the mass add button.

Delete Applicants/Login Profile

Use this screen to remove applicants from Applicant Tracking along with their applicant Web Form login profiles.



- Select the group of employees or the date range and click the mass update button.