

# Simply Personnel – Recruitment Manager

Simply Personnel
Login
Username:
Password:
Change Password:
Login Cancel
www.simplypersonnel.co.uk
Simply Personnel 12.8.0.1
Copyright © Croner Group Limited

## Training Workbook

## Objectives

- Schedule, manage, monitor and maintain Vacancies
- Add Applicants to Vacancies
- Setup Recruitment Flow
- Analyse Recruitment costs
- Set tasks to keep track of Vacancies, Applicants and Recruitment Flow
- Run , create and save reports
- Create mail merged document templates and merge with Applicant and Vacancy data
- Create email templates

Introduction to Simply Personnel Recruitment Manager	4
System Setup	5
Rejection Reasons	6
Action Codes	9
Recruitment Flow	10
Agency / Provider	15
Source	17
Cost Analysis Codes 1 & 2	19
Cost Types	21
Recruitment Documents	22
Creating a New Vacancy	27
Vacancy Maintenance Window	30
Task Summary	31
Vacancy	
Main	32
Notes	33
Applicants	34
Open Actions	35
Administration	
Advertising	37
Costs	38
Qualifications	39
Documents	
Mail Merge	40
Documents	41
Other	43
Existing Vacancy	44
Creating a New Applicant	45
Existing Applicant	48
Applicant Maintenance Window	49
Task Summary	50
Personal	
Main	51
Address	52
Personal	53
Applicant	
Events 1-2 & 3-4	54
References 1 & 2	55
Actions	56
Administration	
Notes	57
Costs	58
Qualifications	59
Documents	
Documents	60
Mail Merge	61
Other	62
Reports	63
Pre-Defined	64
Simply Answers	66
Print Letters	68
Online Recruitment	69
My Notes	70

## Introduction to Simply Personnel Recruitment Manager

The Recruitment Manager Modules allows a user to carry out several recruitment related tasks such as setting up Vacancies and adding Applicants on to the appropriate Vacancy. A user can then move the Applicant through a bespoke recruitment flow which (if created) allows the user to populate documents / emails based on the Applicants data record. The Applicant is then moved through the recruitment flow which then accepts the Applicant as an employee by converting their existing data from Applicant to employee.



## System Setup

The System setup section allows a user to configure the module to meet their company's requirement i.e. defining Rejection Reasons, Setting up the Recruitment Flow, Specifying Cost Types, etc...

Rejection Reasons	🗞 Cost Types
Action Codes	Recruitment Documents
Agency / Provider	
Source	
Cost Analysis Codes 1	
cost Analysis Codes 2	

The user will see an "**In Use**" tick box throughout the system setup, this allows the user to add the appropriate element to the system, taking this "Out of Use" saves this in the background but the user will be unable to run reports/select this element based on this criteria.

## **Rejection Reasons**

Rejection Reasons	🐼 Cost Types
Action Codes	Recruitment Documents
Agency / Provider	
Source	
Cost Analysis Codes 1	
Cost Analysis Codes 2	

This area allows a user to define the different Rejection Reasons that will be recorded against the Applicants record whilst going through the recruitment flow.

Name	In Use	Add
Application returned - after closing date		Update
Application returned - not suitable	M	D. L.
Did not attend Interview		Delete
Did not pass medical		Close
Did not pass written test		
Poor police check		
Poor reference	M	
Unsuccesful interview		

Add: Allows the user to ADD different rejection reasons

aintain Rejection Reas	ons 🗙
Not enough experier	nce
in use	
OK Ca	incel Help
	Not enough experier In Use OK

Update: Allows the user to amend previous entries

			N	laintain Rejection Reasons	;
			Main		
Maintain Rejection	Reasons	– = ×	<u>N</u> ame:	Not Enough Experience	
Name	In Use	▲ <u>A</u> dd			
Application returned - not suitable	M	Undate			
Did not attend Interview		C_CGGGGG			
Did not pass medical	M	D <u>e</u> lete			
Did not pass written test	M	Close			
Not enough experience	M				
Poor police check	M				
Poor reference	M				
University Contact Service	M				

Delete: Removes any highlighted Rejection Reasons





As above, when deleting any elements from the System Setup, if this data is recorded against an Applicants record <u>it will be lost</u>.

## **Action Codes**

•	Dashboard	- • ×
Recruitment System Setup		
×- ×- Rejection Reasons	<b>I</b>	Cost Types
Action Codes	Ó	Recruitment Documents
Agency / Provider		
Source		
Cost Analysis Codes 1		
Cost Analysis Codes 2		
Back		

This area allows users to setup the Recruitment Flow which is bespoke to their company needs from receiving a CV to converting a potential Applicant into an Employee.



Before adding any Action Codes to the system, it would be beneficial to draw out the company's current recruitment flow and split them into 3 sections: Action / Responses / Documents

Please see the example on the next page

## **Recruitment Flow**



The user is then able to start adding Action Codes to the system setup.

	Maintain Actions			– 🗆 🗙
Action		In Use	•	Add.
				Update
				Delete
				Close
			_	

Start by adding all of the actions, do this by clicking on the ADD button on the Maintain Actions window as above.

	Action Maintenance	
tion Res	sponses	
Action:		
Action:	CV Received	
	✓ In use	
Action Ty	/pe:	
Action	n <u>r</u> equires a response	
<ol> <li>Action</li> </ol>	n does <u>n</u> ot require a response	
Action	n rejects applicant (no further actions)	
<ul> <li>Action</li> </ul>	n a <u>c</u> cepts applicant (no further actions)	
Immediate	e Follow-On Action:	
Action	n triggers immediate follow-on action	
Action:		Ŧ
Owner:		
Documen	nt Production:	
Action	n produces a document	
O Docu	ment:	Ŧ
O Email:		Ŧ

The user only has to label the Action name as shown opposite. The other settings can be added at a later time.

This allows the user to create all of the basic Action Codes and they will then be able to determine what each Action does as per the **Recruitment Flow.** 



Ensure 'Action does not require a response' is selected, otherwise Simply Personnel will prompt the user to add further options. As above, this is done at a later stage.

Once added go back in to the first action, i.e. CV Received and select update, the user can now start to link this to documents and responses. (Please see the Recruitment Documents Section).

An immediate follow-on action can be setup by ticking the box in the middle of the window and then select the action from the drop down menu.

Immediate	Follow-On Action: triggers immediate follow-on action	
Action:	Forwarded to Recruiting Manager	•
Owner:		Ŧ

The user can not only set the immediate follow on action (or the next step of the Recruitment Flow), they can select a specific 'Owner'. This is another user on Simply Personnel, so one specific user can manage specific actions, or leave this field blank.

Document Produc     Action produce	ction: es a document		
O Document:	Invite to 1st Interview	•	
O Email:		Ŧ	
		_	_

The user can also specify that when a certain Action is reached the system can automatically populate a template previously created in the system. Please see the Recruitment Documents section for details.

An email template can also be selected from here should the required Action produce an email rather than a document.

If a response is required for an Action, e.g. CV Received – Suitable / Unsuitable, these are responses to an Action.



In 'Action Type' select 'Action Requires a Response' Version 1 **Recruitment Manager** Page | 12

	Action Mainte	nance	2
ction Respon	ses		
Response Tir Default re Default:	ne (Working Days): sponse time can be	changed by us	er
Maximum:	D		
Responses:			
Response	There are no item	s to show	n Use
6			144
	dd	<u>D</u>	elete

The 'Responses' tab allows the user to specify the desired response in regards to the opposite Action.

The Response time can be specified at the top or left blank if required.

At the bottom of the window, this allows the user to create a set of Responses based on the Action, in this example CV Received (as per the Recruitment Flow) has:

CV Possible

CV Suitable

CV Unsuitable

Click the **ADD** button to add these as a response.

The user can now add the Response as mentioned above and the follow on action for that specific Response.

	Response Mainten	ance	x
Response: <u>R</u> esponse:	CV Suitable		
Follow-On /	Action: use <u>triggers follow-on action</u>		•
<u>0</u> wner:			•
		<u>S</u> ave	<u>C</u> ancel

The user can now follow and set up the different Action Codes that relate to the bespoke Recruitment Flow.

There are several areas on the Recruitment Flow where there is no follow on action i.e. Accept / Reject Applicant.

Action Type:		
O Action rec	quires a response	
Action do	es <u>n</u> ot require a response	
<ul> <li>Action rej</li> </ul>	ects applicant (no further actions)	
Action ac	cepts applicant (no further actions)	

The above Action Type will stop the Recruitment Flow and therefore reject the Applicant.

Ac	ction Type:
C	Action requires a response
C	Action does not require a response
C	Action rejects applicant (no further actions)
G	Action accepts applicant (no further actions)

The above Action Type will also stop the Recruitment Flow and accepts the Applicant as above

## Agency / Provider

•	Dashboard – 🗆	×
Recruitment System Setup		
×— ×— Rejection Reasons	🗞 Cost Types	
Action Codes	Recruitment Documents	
Agency / Provider		
Source		
Cost Analysis Codes 1		
Cost Analysis Codes 2		
Back		

Agency / Provider allows the user to keep a log of all addresses and contact details for different agencies and providers used for Recruitment.



This feature is completely optional as is not essential to complete the Recruitment Manager System Setup

Agency / Advertising Provi	der	>
Name	In Use	Add.
Austin Benns	R	Undate
Howard Jackson Agency	R	
Yorkshire Post Newspaper	M	D <u>e</u> lete
		Close

Click on **ADD** to enter the details for the different Agency / Provider as per the following screenshot:

Agency / Advertising Provider 🛛 🗙				
Main Address				
<u>P</u> rovider Name:	Jer Name: Local College			
Contact Name:	John Smith			
Telephone 1:	01234 456789			
Telephone 2:	01234 456798			
F <u>a</u> x:	01234 456799			
<u>E</u> mail:	john.smith@localcollege.com			
🕑 In Use				
	UK Cancel Help			

Address details can also be added by click the 'Address' tab at the top of the window.

#### **Source**

٠	Dashboard – 🗆 🗙
Recruitment System Setup	
×— ×— Rejection Reasons	Cost Types
Action Codes	Recruitment Documents
Agency / Provider	
Source	
Cost Analysis Codes 1	
Cost Analysis Codes 2	
Back	

The user can also add the different type of sources of the origin of the Applicant, e.g. Internet, Newspaper, Agency, Magazine etc...

۲	Maintain Sources		– 🗆 🗙
Name		In Use	Add
Internal			Update
Internet			Delete
Intranet			Delete
Magazine			Close
Newspaper			

Similar to the Agency / Provider section, click on **ADD** and enter the different sources



This is also an optional section and is not mandatory to complete the setup.

Main		
<u>N</u> ame:	Social Media	
	🔽 <u>I</u> n Use	
	OK Cancel	Help

## Cost Analysis Codes 1 & 2

Das	hboard – 🗆 🗙
Recruitment System Setup	
×- ×- Rejection Reasons	🗞 Cost Types
Action Codes	Recruitment Documents
Agency / Provider	
Source	
🛿 😰 Cost Analysis Codes 1	
Cost Analysis Codes 2	
Back	

Cost Analysis Codes are to be used in conjunction with Cost Types to allow the user to specify and filter individual cost types through reporting.

For example, Cost Analysis Codes 1 can be used for keeping track on what the cost relates to:

Maintain Cost Analysis Code 1		>
Name	In Use	Add
Documentation		Undate
Medical	R	
Police Check	M	D <u>e</u> lete
Promotion of Vacancy	M	Close
Reference	M	
Room Rental	M	_
Subsistance	M	
Travel	M	
	PC.	

The user clicks on **ADD** and labels the different types of Analysis Codes. These can be used to filter out specific costs through the reports within Simply Personnel, e.g. all costs relating to Travel.

Analysis Codes 2 can be used for keeping track of who the cost gets billed to.

Maintain Cost Analysis Code 2		– 🗆 X
Name	In Use	<u>A</u> dd
Recharged to Admin		Update
Recharged to Development	Z	
Recharged to IT		Delete
Recharged to Sales		Close



The Analysis Codes are completely optional and should only be populated if there is a requirement to do so.

## Cost Types

•	Dashboard	×
Recruitment System Setup		
×— ×— Rejection Reasons	•	Cost Types
Action Codes		Recruitment Documents
Agency / Provider		
Source		
Cost Analysis Codes 1		
Cost Analysis Codes 2		
Back		

As mentioned previously, Cost Types are associated with the Cost Analysis Codes. These are more generic and should mainly be used to detail how much it has cost the company to Recruit and setup Vacancies.

ne In Use In Use Add. ncy Fee ⊠ Update licant Cost ⊠ Dglete pazine Advertisement ⊠ Close rspaper Advert	Maintain Cost	t Types	– 🗆 🗙
ncy Fee   Icant Cost Iview Room Hire Jazine Advertisement Icant Advert Icant Advert Icant Advert Icant	Name	In Use	Add.
licant Cost     Image: Control of Contro of Contro of Control of Control of Control of Control of Control	Agency Fee	M	Undate
rview Room Hire jazine Advertisement /spaper Advert /spaper Advert /spaper Advert /spaper Advert /spaper Advert //	Applicant Cost		
azine Advertisement 🕅 Close	Interview Room Hire		D <u>e</u> lete
/spaper Advert	Magazine Advertisement		Close
	Newspaper Advert		
	Newspaper Advert	M	_

Click on **ADD** to add the different Cost Types associated with Recruitment.

## **Recruitment Documents**

•	Dashboard	-	
Recruitment System Setup			
×— ×— Rejection Reasons	<b>र</b>	Cost Types	
Action Codes		Recruitment Documents	
Agency / Provider			
Source			
<b>₽</b> Cost Analysis Codes 1			
Cost Analysis Codes 2			
Back			

The final part of system setup relates to Document templates

This is where the user can develop and design all documents associated with Recruitment from confirming receipt of CV, Interview invites to an Offer and Contract for successful Applicants.



Before setting up any document, the user will need to create a Document Group in Personnel Manager First.

#### Go to Dashboard -> Personnel Manager -> System Setup -> Business Rules -> Document Groups

And create a Document Group titled 'Recruitment'

Documer	nt Groups		– – ×
Name	In Use	•	Add
Leaver	M		Undate
New Starter	M		e parte
Recruitment			D <u>e</u> lete
Right to Work	M		Close
Scanned Documents	M		
SP TRAINING	M		
Training	M		
Working Time			

After setting

up the group

in Personnel Manager the user is then able to setup document templates in Recruitment Manager.

Return to Recruitment Documents as shown in the first screenshot.

Recruit	ment Documents	– 🗆 🗙
Document Group: < <all>&gt;</all>		- Add
Document 🛆	Group	Ed <u>i</u> t
Application Form	Recruitment	Сори
Invite to 1st Interview	Recruitment	Copy
Offer Letter 2015	Recruitment	Delete
Reference Request	Recruitment	
		Cjose

#### Click ADD to add a new template

standard document you are be shown in the list of stand merging a letter for applicar	creating. This is the name that will dard documents to use when mail its.	Cancel
Standard Document Name:	Rejection Letter	
Document Group:	Recruitment	
Application Form Invite to 1st Interview Offer Letter 2015 Reference Request	Appraisal Contract Disciplinary Emails Grievance Leaver New Statter Recruitment Right to Work Scanned Documents SP TRAINING Training Working Time	сцк Соду D <u>e</u> lete

The user can now enter a name for the template e.g. Rejection Letter, and specify which group this template resides i.e. 'Recruitment'



Simply Personnel will not allow duplicate names, for past/future templates it is worth specifying the year they were made; 2014, 2015, 2016 etc...

Click OK

Afterwards in the 'Insert Object' window the user now has two options:

#### **Create New**

	Insert Object	×
<ul> <li>Create New</li> <li>Create from File</li> </ul>	Object Type: Microsoft PowerPoint Presentation Microsoft PowerPoint Slide Microsoft Word 97 - 2003 Document Microsoft Word Document Microsoft Word Macro-Enabled Docu OpenDocument Presentation OpenDocument Spreadsheet OpenDocument Text	OK Cancel
Result Inserts into yo	s a new Microsoft Word Document object our document.	

This gives the user the option to create a brand new template from scratch, in the 'Object Type' list, select the desired document i.e. Microsoft Word Document and click **OK**.

#### **Create from File**

	Insert Object	x
Create <u>N</u> ew Create from File	Fil <u>e</u> : C:\Program Files (x86)\Simply Personnel\ <u>B</u> rowse	Cancel
Result Inserts your do the pro	the contents of the file as an object into ocument so that you may activate it using gram which created it.	

This gives the user the option to select a previously created template to upload this into Simply Personnel.

When creating a new document template, create the basic letter as shown in the example below

Re Hone Inset Page Layout References Malinas	Document in Simply Personnel - Microsoft Word Review View	- 6
Corr Bunk Page Table Picture Clip Shapes SmartArt Chart Page Table Table District Chart Shapes SmartArt Chart Page Table Table District Chart Shapes SmartArt Chart Pages Table District Chart Picture Clip Shapes SmartArt Pi	A     A	πΩ Equation Symbol Symbols
	anna anna anna anna anna anna anna ann	ě
	Date Applicant Name	
	Street Address Post Code	
	at.] Dear	
	Thank you for your interest in our recently advertised position as detailed above.	
	In light of your background and the position available, it does not appear that an interview would be mutually beneficial at this time. We <u>WIII</u> , however, maintain your CV for a period of one year for future considerations.	
	We appreciate your interest in our company and with you every success.	
	Sincerely	
Page: 1 of 1 Words: 78 📣 English (U.K.)		

The user can now add mail merge fields from Simply Personnel to populate the template with the Applicant and Vacancy details.

	Document in Simply Personnel - Microsoft Word
References Mailings Review	View
Edit ipient List Merge Fields Block Line	Insert Merge       Whatch Fields         Field *       Update Labels
Write & In	Applicant_ID     iew Results     Finish       Vacancy_Reference     1 + 9 + 1 + 10 + 1 + 11 + 1 + 1       Vacancy_Post
	Title Surname
	Other_Names Known_As
Date	Enquiry_Date Vacancy_Closing_Date Address_1
«Title» «Forename» «S	Address_2 Address_3
Street Address	Address_4 Address_5

Complete the rest of the letter template by adding the appropriate mail merge fields, header, signature and any other formats if applicable.

Γ	Croner T HR·Tax·H&S·Reward
	Date
	«Address_1»
	«Address_2»
	«Address_3»
	«Address_4»
	«Address_5»
	«Postcode»
	BE: «Vacancy_Reference» «Vacancy_Post»
	Dear «Forename»,
	Thank you for your interest in our recently advertised position as detailed above.
	In light of your background and the position available, it does not appear that an interview would be mutually beneficial at this time. We will, however, maintain your CV for a period of one year for future considerations.
	We appreciate your interest in our company and wish you every success.
	Sincerely,
	A Sample
	HR Team

#### All text formats, images as done above will be saved in Simply Personnel.

The user closes Microsoft Word down, and this template is now saved in Simply Personnel.

ecrui	tment Documents		- • ×
Document Group: << <all>&gt;</all>	>	•	<u>A</u> dd
Document 🛆	Group		Edjt
Application Form	Recruitment		Сору
Offer Letter 2015	Recruitment	-	D <u>e</u> lete
Reference Request	Recruitment		
Rejection Letter	Recruitment		
			Close
		_	Ciose

## Creating a New Vacancy

•	Dashboard – 🗆 🗙
Recruitment Manager	
🔀 System Setup	Task Summary
😋 Existing Applicant	1 4 URGENT TASKS
New Applicant	0 UPCOMING TASKS     1 FUTURE TASK
Existing Vacancy	
New Vacancy	Print Letters
Reports	Online Recruitment
Back	

To add a new Vacancy in the recruitment module select New Vacancy as above.

This will open up the following window:

		INEW	vacano	у		_	
Vacancy:				Details:			
R <u>e</u> ference:	POS123			Location:	London		•
<u>P</u> ost:	Payroll Mana	ger	•	Department:	Payroll		•
<u>S</u> tatus:	OPEN		•	Salary <u>B</u> and:	Band 2		•
Application Closi	ng Date:	31/08/2015		Specific Salary:	£28,000		
Target Date To I	F <u>i</u> ll Vacancy:			Employment Typ	e: Full Time		•
Date Vaca <u>n</u> cy C	reated:	24/07/2015					
Date Vacancy C	l <u>o</u> sed:						
Show on We Show Vacancy F Show Vacancy T Number of Vaca	b From: To: ncies:	1					
First Action:			•				
			< <u>B</u> ack	Finish	Cancel	He	elp

Enter a reference number, assign it to a post (position in the company) and enter the closing dates, location and salary.



If the self service module is installed, the Vacancy can be made available to employees by updating the 'Online Settings'.

Once all the required information has been completed, click **FINISH**. The system will confirm that the Vacancy has been added and will ask the user to enter any further details:



If the user selects YES they will be taken through to the Vacancy maintenance window.

## Vacancy Maintenance

The user can now detail various aspects of the Vacancy and maintain the interview location, dates, time etc. The status of the Vacancy can be changed or re-scheduled. Applicants can be added to the Vacancy.



Utilise the tabs on the side to navigate

The Maintenance window displays quick links on the right hand side.



The Task Summary will identify any upcoming/current and out of date tasks in regards to the opened record.

Current Vacancy costs are displayed.

Application Summary shows total number of Applicants recorded against the Vacancy of which are Pending / Rejected.

The user can also quickly Add or Process an Applicant.

Clicking on the 'Future/Upcoming/Urgent Tasks' icon will open up the Task Summary window which displays tasks in relation to the record that is open.

#### Task Summary

	. 🕶 🗟 📼 🍩	÷			Simpl	y Personnel	<ul> <li>Vacancy Mair</li> </ul>	tenance -	POS123 - Payroll Manager [OPEN]		
HOME	SYSTEM SETUP	PERSONNEL	TRAINING	RECRUITMENT	REPORTS	<u>U</u> PDATES	DOCUMENTS	HELP			
Recruitment Dashboard	w Vacancy Maintenance Vacancies	Delete Vacancy	Applicant Maintenance	Transfer Delete Applicant Applicant	Change t Applicant ID	Mail Merge Queue Documents	Task List Tasks Online	<b>r</b> Recruitment			
Task List											
ask List											
A n	· · · · • • • •										
Personnei A	raining 🛕 Recrui	tment									
Task Date $\Delta$	raining 🚹 Recrui	sk 🛆			Vacancy 🛆				Applicant a	Owner	Notes
Task Date 🛆	raining 🚹 Recrur Ta CV	tment sk д / Received			Vacancy $\Delta$ SP 009				Applicant a Mitchell, Adam	Owner	Notes
Task Date	raining 🚹 Recrui Ta CV Aw	sk a 'Received vaiting Interview Dat	e		Vacancy $\Delta$ SP 009 SP 001				Applicant 🗳 Mitchell, Adam Poyser, Trevor Philip	Owner	Notes
Task Date 29/10/2014 20/04/2015	raining 🚹 Kecrur Ta CV Av Fo	sk Received vaiting Interview Dat	e g Manager		Vacancy SP 009 SP 001 001 LONDON				Applicant s Mitchell, Adam Poyser, Trevor Philip Smith, James	Owner ADMIN ADMIN	Notes
Task Date 29/10/2014 20/04/2015 20/04/2015	raining A Recrui Ta CV Aw Fo Fo	tment Received vaiting Interview Dat nwarded to Recruitin nwarded to Recruitin	e g Manager g Manager		Vacancy A SP 009 SP 001 001 LONDON APP POOL				Applicant <u>a</u> Mitchell, Adam Poyse, Trevor Philip Smith, James Smith, James	Owner ADMIN ADMIN ADMIN	Notes
Personnel         I           Task Date         1           29/10/2014         1           20/04/2015         20/04/2015           20/04/2015         22/04/2015	raining A Recrui Ta CV Av Fo Fo Av	tment Received vaiting Interview Dat rwarded to Recruitin rwarded to Recruitin rwarded to Recruitin	e g Manager g Manager e		Vacancy A SP 009 SP 001 001 LONDON APP POOL 005 LINCOLN				Applicant 3 Mitchell, Adam Poyser, Trevor Philip Smith, James Smith, James	Owner ADMIN ADMIN ADMIN ADMIN	Notes

Simply Personnel separates tasks for each module as per the tabs above.

Scroll down to the bottom of the task list to see the Task Summary features.

<u>P</u> rint <u>E</u> xport	The user is able to Print / Export this data to an external application should this data be required for business purposes.
E <u>m</u> ail	Click 'Email' to send an email to either Applicant or Task Owner if associated against that specific task.
Respond	Applicants can be moved through the Recruitment Flow from here. The user clicks <b>RESPOND</b> if the task specifies a response is required.
Applicant Vacanc <u>y</u>	Applicant / Vacancy maintenance windows can be accessed via the corresponding buttons.
<u>N</u> arrative	The user can also add Narrative information here.



The User can move the Task List to all edges of the screen and use the " " to lock the list into place which will auto-hide when not in use.

### Vacancy

<u>Main</u>

•	Vacancy Maintenance - POS123 - Payroll Manager [OPEN]	×
	Main Notes Applicants Open Actions	FUTURE TASKS
	Vacancy: Reference: POS123 Bati Parenti Managar	Cost Details
POS123	Loss.     Payroli Mariager       Status:     OPEN       Salary Band:     Band 2	Costs: 0.00
Payroll Manager Payroll	Application Closing Date: 31/08/2015 Specific Salary: £28,000 Target Date To Fill Vacancy: Employment Type: Full Time *	Applicant Summary
London	Date Vacancy Created:     24/07/2015       Date Vacancy Closed:	Pending: 0 Rejected: 0
Vacancy	Online Settings: Show on Web	
Administration Documents	Show Vacancy From: Show Vacancy To:	
Other	Number of Vacancies: 1 First Action:	
		Add Applicant Process Applicant

The main page will show the information that the user entered when creating the Vacancy it is also where the user will change the status once the Vacancy has been filled.

The change status will allow the user to set the Vacancy from Open/Suspended/Closed.



To save the record, simply close down the window after making any changes

#### <u>Notes</u>

	Vacancy Maintenance - POS123 - Payroll Manager [OPEN]	– = ×
POS123 Payroll Manager Payroll London Vacancy Administration Documents Other	Main       Notes       opplicants       Open Actions         Image: Complexity of the second	FUTURE TASKS  Cost Details  Costs: 0.00  Applicant Summary  Total Applicants: 0  Pending: 0  Rejected: 0
	Import	Add Applicant Process Applicant

The notes section allows the user to input any details in regards to the Vacancy.

The import button (when clicked) will import text from any document associate with the Vacancy job position in Personnel Manager -> System Setup -> Business Rules -> Posts see below:

			Posts	x
•		Post Maintenance		
Post	TNA Profil	Post:	Payroll Manager	
HR Officer		Reports to:	Managing Director	
Managing Director		Positions:	999 *	
Marketing Assistant		r contorio.		
Marketing Director		Shares:	1 📮	
Marketing Manager			🕑 In Use	
Office Manager		TNA Profile:	·	
Payroll Manager		Description		
Sales Consultant		Document:	Chemical Description. Joes Ope	a 1
a 1 an 1				
			OK Cancel He	lp

#### **Applicants**

٠		Vacancy Maintenance - POS123 -	Payroll Manager	OPEN]		×
	Main	Notes Applicants Open Actions				
	ID 49	Reference Name	Status Pending	Rating 4	Enquiry Date	Cost Details
			renaing	•	24/01/2015	Costs:
POS123						0.00
Payroll Manager						Applicant Summary
Payroll						Total Applicants: 1
London						Pending: 1
						Rejected: 0
Vacancy						
Administration						
Documents						
Other						
	•	Ш			•	
	ln In	nclude rejected applicants nclude accepted applicants	Email	Add	Update	Add Applicant
	_					Process Applicant

The Applicant page allows the user to add Applicants against the Vacancy.

Double clicking an Applicant will take the user directly to the Applicant Maintenance window.

Emails can be sent directly to the Applicant from here by highlighting an Applicant and clicking on **Email** at the bottom of the screen.



Email templates will need to be setup in the Business Rules via Personnel Manager's system setup.

Clicking A<u>DD</u> allows the user to create a new Applicant for this Vacancy. Please go to the 'Creating a New Applicant' section for more details.

#### **Open Actions**

٠	Vacancy Maintena	nce - POS123 - Payroll Man	ager [OPEN]	–
	Main Notes Applicants Open Action: < <all>&gt;</all>	Action		L UPCOMING TASKS
	TasksAction DateReference127/07/2015186	Applicant y Mitchell, Adam Charles	Action Invite to 1st Interview	Cost Details Costs:
POS123	A 27/07/2015 181	Green, Teresa	Invite to 1st Interview	0.00
Payroll Manager				Applicant Summary
Payroll				Total Applicants: 3
London				Pending: 2
				Rejected: 1
Vacancy				
Administration				
Documents				
Other				
	4		•	
		R <u>e</u> spond.	<u>N</u> arrative <u>A</u> pplicant	Add Applicant
				Process Applicant

The Open Actions page allows the user to keep a track on multiple Applicants and which records require attention.

The example above prompts the user to 'Invite to 1<sup>st</sup> Interview' as per the Recruitment Flow setup earlier (see Action Codes).



Actions can be responded to for multiple Applicants by multi select (Hold down CTRL + Click Applicants or Hold down SHIFT + [down arrow))

The user would then click 'Respond' and select the appropriate response to move the Applicants along the Recruitment process.

ct <u>i</u> on:	< <all>&gt;</all>		•			
lasks 🛛	Action Date	Reference	Applicant 🔻 🗸		Action	
Δ	27/07/2015	186	Mitchell, Adam Ch	arles	Invite to 1st	Interview
A	27/07/2015	181	Green, Teresa		Invite to 1st	Interview
_						_
•			Ш			
				Respond	Narrative	Applicant

Respond to Action

Applicants telephoned and have confirmed they can attend Interview

Interview 1 confirmation

31/07/2015

Applicants: <<Total: 2>>

Response: Interview Confirmed

Action:

Response:

Closing <u>N</u>arrative:

Follow-On Actions:

Awaiting Interview Date

Invite to 1st Interview

Select multiple Applicants and click
'Respond'

Change the Response field and select the approripate response in relation to the action.

lain	Notes Appli	cants Oper	n Actions	
Action	< <all>&gt;</all>		•	
Tasks	Action Date	Reference	Applicant 😙	Action
Θ	31/07/2015	187	Mitchell, Adam Charles	Awaiting Interview Date
Θ	31/07/2015	188	Green, Teresa	Awaiting Interview Date
4				

Return to the Vacancy Maintenance window and notice how the Applicants Action has now been moved along the Recruitment Flow.

lints and Typs star

Tasks icons change from a status that requires attention to a future task

ОΚ

Heli

.

ADMIN

Update... <u>D</u>elete

## **Administration**

#### **Advertising**

<b>4</b>	Vacancy Maintenance - PO	S123 - Payroll Manager [OPEN]	– 🗆 🗙
	Advertising Costs Qualifications		FUTURE TASKS
	Date Description	Provider Source	
	24/07/2015 Website	Howard Jackson Agency Internet	Cost Details
	24/07/2015 Advertisment	Yorkshire Post Newspap Newspaper	Costs:
POS123			0.00
Payroll Manager			Applicant Summary
Payroll			Total Applicants: 3
London			Pending: 2
			Rejected: 1
Vacancy			
Administration			
Documents			
Other			
	4	₩	
		Add Delete Provider	Add Applicant
			Process Applicant

The Advertising page can be used to keep historic records on the different methods used to advertise this current Vacancy.

- ADD Allows the user to add new methods of advertising.
- **UPDATE** Can be used to change current data
- **DELETE** Will remove the highlighted data record

**PROVIDER** Allows the user to view additional provider details (opens in a separate window)

<u>Costs</u>

٠	Vac	ancy Mai	intenance - POS123 - I	Payroll Manage	r [OPEN]		-	• ×
	Advertising Costs Jualifications						FUTURE TASKS	
	Date	Cost	Cost Type	Description				
	24/07/2015	250.00	Magazine Advertisement	Colour Advert			Cost Details	
	24/07/2015	300.00	Interview Room Hire	Outsourced			Costs:	
POS123							550.00	
Payroll Manager							Applicant Summ	ary
Payroll							Total Applicants:	3
London							Pending:	2
							Rejected:	1
Vacancy								
Administration								
Documents								
Other								
	Vacancy Tota	I:	550.00	<u>A</u> dd	U <u>p</u> date	D <u>e</u> lete		
	Applicant Tota	al:	0.00					
	Grand Total:		550.00				Add Applica	int
							Process Appli	cant

The Costs page can be used to record different types of costs involved in regards to Recruitment.

As additional costs get added to this section, this page also displays both Vacancy and Applicant costs separately (which can be added to individuals via the Applicant Maintenance window).

## **Qualifications**

•	Vacancy Mainter	nance - POS123 - Payrol	l Manager [OPE	N]	×
	Advertising Costs Qualification	ons			FUTURE TASKS
	Qualification $\Delta$	Subject	Grade	Notes	
	Degree	Π	2.2		Cost Details
	GCSE	English	В		Costs:
PO\$123	GCSE	Maths	C		550.00
Pavroll Manager	HND	11 Management Skills	Distinction		Angelian et Commune
Pavroll		management skins	Distinction		Applicant Summary
London					Total Applicants: 3
					Pending: 2
					Rejected: 1
Vacancy					
Administration					
Documents					
Other					
	•			•	
		A	dd Update	e Delete	Add Applicant
					Process Applicant

The Qualifications page can be used to identify minimum qualification levels for potential Applicants.

The user clicks on **ADD** and adds the qualifications in the pop up window.

## **Documents**

#### Mail Merge

٩	Vacancy Mair	ntenance - PC	) S123 - Payroll Manager [O	PEN]	– 🗆 🗙
	Mail Merge Documents				FUTURE TASKS
	Action Date Produced	Date Produc.	Applicant	Template	
		24/07/2015	(49) Green, Teresa	Invite to 1st Interv	Cost Details
		24/07/2015	(50) Mitchell, Adam Charles	Invite to 1st Interv	Costs:
	31/07/2015		(50) Mitchell, Adam Charles	Interview 1 confin	550.00
POS123	31/07/2015		(49) Green, Teresa	Interview 1 confin	
Payroll Manager	31/08/2015		(49) Green, Teresa	Standard applicati	Applicant Summary
Payroll					Total Applicants: 3
London					Donding: 3
					Penuing, Z
					Rejected: 1
Vacancy					
Administration					
Documents					
Other					
	4			•	
	Include produced letters		Prod	duce Delete	Add Applicant
					Process Applicant

From this page, as the Applicant is moved through the Recruitment Flow by selecting responses to actions, Simply Personnel will keep a repository of documents to be produced.

Several documents can be highlighted and produced at the same time. Holding the CTRL key and selecting the documents required allows the user to do this.

#### **Documents**

	Vacancy	/ Maintenance - POS123 -	Payroll Manager [OPE	N]		– = ×
	Mail Merge Docum	ents				L UPCOMING TASKS
	Document Group:	< <all>&gt;</all>	•			Cast Dataila
	Date Created	Description	Group	Linked	Docur	Cost Details
	07/07/2015	Interview Questions	Recruitment		Micros	Costs:
POS123						
Payroll Manager						Applicant Summary
						Total Applicants: 3
London						Pending: 2
						Rejected: 1
Vacancy						
Administration						
Documents						
Other						
		100				
			Properties Activa	ta D	lalata	Add Applicant
		Inser	Active Active			
						Process Applicant

Documents in relation to the Vacancy can be stored on the Documents tab. To load a document, the user clicks **INSERT** 



The pop-up windows allows the user to create a document from scratch, or browse to a file location to locate a previously created file.

Clicking **OK** displays a second window which requires additional information:

- Type a name for the document
- Date created
- Select the appropriate group
- Comments (optional)
- Click OK

	Document Properties		X
Description:	Meeting Room Booking Invoice	•	OK
Date Created:	22/07/2015		Cancel
Document Group	Recruitment	•	
Notes:			
Comments attac	hed. 22/07/2015		

•	Vacancy	/ Maintenance - POS12	23 - Payroll Manager [OPE	N]			• ×
POS123 Payroll Manager Payroll London	Mail Merge Docum Document Group: Date Created 07/07/2015 22/07/2015	ents       < <all>&gt;       &lt;<all>&gt;       Absence       Appraisal       Contract       Disciplinary       Emails       Grievance       Leaver       New Starter       Right to Work       Scanned Documents       SP TRAINING       Training       Working Time</all></all>	roup ecruitment ecruitment	Linked	Docur Micros Micros	UPCOMING TA Cost Details Costs: 550.00 Applicant Summ Total Applicants: Pending: Rejected:	sks Pary 3 2 1
Vacancy Administration Documents Other	4	III İnse	ert <u>P</u> roperties <u>A</u> ctiva	e D	) Sete	Add Applica Process Appl	int icant

Multiple documents can be stored and filtered through the appropriate group from the top drop down box for quicker navigation.

Clicking **PROPERTIES** allows the user to change the document details.

**ACTIVATE** opens the highlighted document.

**DELETE** will delete this document from Simply Personnel



When uploading documents to Simply Personnel, the user has the option to link a document rather than defaulting to embed.

**Linking Documents** Tells the system where a document is saved on a local / network drive. As the document is now linked, the document must remain in the same location path at all times (if removed, the link to Simply Personnel will be broken.

**Embedding Documents** Saves a copy of the document on the database. The original document on the local / network drive can be removed if desired. Unlike Linking a document, if the original document is updated the same document on Simply Personnel will also need to be updated.

#### <u>Other</u>



Simply Personnel has a Screen Designer feature that will allow the user to create a bespoke page to input data on to a record which cannot be recorded on the pre-defined fields.

Please see the Screen Designer Guide for more details.

## **Existing Vacancy**

	Dashboard	>
Recruitment Manager		
🔀 System Setup		Task Summary
Section Content		A URGENT TASKS
New Applicant		<ul> <li>2 UPCOMING TASKS</li> <li>① 1 FUTURE TASK</li> </ul>
Existing Vacancy		
New Vacancy		Print Letters
Reports		Online Recruitment
Back		

Existing Vacancy opens a search window allowing the user to browse previous, current and future Vacancies created on Simply Personnel and filter out:

			Search Results:					
Reference	2:		Reference A	Post	Location	Department	Status	
Post:	ccALLSS.		001 LONDON	Administrator			OPEN	
			005 LINCOLN	Administrator			OPEN	
status:	OPEN	•	APP POOL	Accountant			OPEN	
			POS123	Payroll Manager	London	Payroll	OPEN	
Location:			SP 001	Administrator			OPEN	
< <all>&gt;</all>		•	SP 002	HR Manager			OPEN	
			SP 003	Administrator			OPEN	
Departme	ent:		SP 004	Administrator			OPEN	
< <all>&gt;</all>		•	SP 009	HR Officer	London	Human Reso	OPEN	

- A specific reference number/code
- Different Posts
- Open/Closed/Suspended Status
- Locations and/or Departments

## **Creating a New Applicant**

Dashboard	- 0
	Task Summary
	1 4 URGENT TASKS
	2 UPCOMING TASKS     1 FUTURE TASK
	Print Letters
	Online Recruitment
	Dashboard

Once a Vacancy has been created, the user can now add an Applicant to the system and linked to the appropriate Vacancy.

The following pop-up windows will need to be populated:

•	New Applic	ant	- • ×	Details of the Applicant will be
Basic Details: Applicant Ref: Sumame: Forename: Other Names: Known As: Title: Se <u>x</u> : Rating: Rating: Comments: Suitable CV	<undefined> 001 Green Teresa Teresa Miss Male O Female 4</undefined>	Vacancy: Vacancy Ref: POS123 Post: Payroll Manage Enquiry: Agency: Howard Jackso Sgurce: Internet Enquiry Date: 24/07/2015	n Agency V	Not all fields have to be completed in this section, this can always be done at a later date however basic details will still need to be recorded to add this Applicant.
Address:	< Back	Cancel	Hep	Click <b>NEX</b> Add the Applicants contact
<u>A</u> ddress: <u>P</u> ostcode:	123 Fake Street Town Country AB123DE	Work Phone:         01234 56789           Home Phone:         01234 54788           Mobile Phone:         07715 12345           Work Email:         email@work.co           Home Email:         email@home.co	uk 💟	details.
				use these address fields to populate document templates and send emails to any email address stored in these fields.
	< <u>B</u> ack	Next > Cancel	Help	Click <b>NEXT</b>

	New Applie	cant -	- 🗆 X	OPTION
Personal: Date of Birth: Age: Marital Status: Nationality: Ethnic Origin:	Registered Disabled	Picture:	ear	the Use date of nationa they ha disabled Simply I storage Applicat
	< <u>B</u> ack	Cancel	Help	
	< Back	Cancel	Help	_On the
First Action:	< Back	Cancel	Help	_On the
First Action:	< Back	Cancel	Help	_On the Select ti
First Action: First Action: CV Received Qwner: J(	< Back New Applic	Cancel Ca	Help	_On the Select th Recruitr owner (
First Action: First Action: CV Received Owner: Action Date: Vacancy closing Specific Date:	< Back New Applic	Cancel Cancel Cancel Cancel Cregion Narative: Cregion Narative: CV Looks good, double check recent employment background.	Help	_On the Select th Recruitr owner ( Browse the loca
First Action: First Action: CV Received Qwner: Ju Action Date: Vacancy closing Specific Date: CV Details:	< Back	cant - Cregtion Narrative: Cregtion Narrative: CV Looks good, double check recent employment background.	Help	_On the Select t Recruite owner ( Browse the loca Input C
First Action: First Action: CV Received Qwner: Action Date: Vacancy closing Specific Date: CV Details: Document Path:	< Back New Applic	Cancel Cancel Cancel Cancel Cancel Cregion Narative: Cry Looks good, double check recent employment background. re\Personal Documents\CV02072015, Preversonal Documents\CV020720	Help	_On the Select th Recruitr owner ( Browse the loca Input CV group e
First Action: First Action: CV Received Owner: Action Date: Vacancy closing Specific Date: CV Details: Document Path: Description:	< Back	Cancel	Help	_On the Select th Recruitr owner ( Browse the loca Input CV group e
First Action: First Action: [CV Received @wner: Ju Action Date: Vacancy closing Specific Date: CV Details: Document Path: Description: Date Created:	Rew Applic      New Applic      ONH     C:\Users\adam.mitchell\OneDriv      Covering Letter and CV      22/07/2015	cant - Narrative: Cregtion Narrative: Cregtion Narrative: CV Looks good, double check recent employment background. re\Personal Documents\CV02072015,	Help	_On the Select th Recruite owner ( Browse the loca Input CV group e Add not
First Action: First Action: CV Received Qwrer: Jr Action Date: Vacancy closing Specific Date: CV Details: Document Path: Description: Date Created:	< Back New Applic New Applic ONH Columnation (Columnation) (Columnation) (Columnation) (Columnation) (Columnation) (Columnation) (Columnation) (Colu	Cancel Cancel Cancel Cancel Cancel Cregion Narrative: Cry Looks good, double check recent employment background. re\Personal Documents\CV02072015, Pr	Help	_On the Select t Recruiti owner ( Browse the loca Input CV group e Add not
First Action: First Action: CV Received Owner: Jr Action Date: Vacancy closing Vacancy closing Vacancy closing Vacancy closing CV Details: Document Path: Description: Date Created: Document Group: No.	< Back New Applic New Applic Covering Letter and CV 22/07/2015 Linked Recruitment Event of Linked	Cancel	Help	_On the Select t Recruite owner ( Browse the loca Input C group e Add not
First Action: First Action: CV Received Owner: Action Date: Vacancy closing Specific Date: CV Details: Document Path: Description: Date Created: Document Group: Notes:	C:\Users\adam.mitchell\OneDriv  C:\Users\adam.mitchell\OneDriv  Covering Letter and CV  22/07/2015  Linked  Recruitment  Attached notes]	Cancel Cancel Cancel Cancel Creation Narrative: Creation Narrative: CV Looks good, double check recent employment background.	Help	_On the Select ti Recruitr owner ( Browse the loca Input CV group e Add not

**OPTIONAL :** If required to do so, record an Applicants marital status, ethnic origin and if en registered

onnel also allows the notos against the ecord.

s tab does NOT have be populated, leave nk then:

Click **NEXT** 

screen:

st Action Code as per Flow and select an uired).

cate the CV stored on etwork drive.

ails, name, date,

required.

Click FINISH

## **Existing Applicant**

ashboard – 🗆 🗙
Task Summary
4 URGENT TASKS
! 3 UPCOMING TASKS         (b) 1 FUTURE TASK
Print Letters
Online Recruitment

After loading Applicants on to Simply Personnel, the user can access these by clicking on Existing Applicant as highlighted above and search for:

	Search	Results:					
ID / Ref.:	ID	Vacancy	Reference	Name	Status	Rating	Enquiry Date
Surname:	38	SP 001 (Ad	38	Poyser, Trevo	Pending	0	22/10/2014
atininum Dations	41	SP 001 (Ad	41	Mitchell, Adam	Pending	0	31/10/2014
Minimum Raung:	42	SP 003 (Ad	42	D, Heather	Pending	4	04/11/2014
	45	SP 009 (HR	45	Mitchell, Adam	Pending	0	11/12/2014
Include rejected applicants	46	APP POOL (	46	Smith, James	Pending	0	15/04/2015
Include accepted applicants	47	001 LONDO	47	Smith, James	Pending	0	15/04/2015
	48	005 LINCOL	48	Smith, James	Pending	0	15/04/2015
	49	POS123 (Pa	001	Green, Teresa	Pending	4	24/07/2015
	50	POS123 (Pa	002	Mitchell, Ada	Pending	0	24/07/2015

- An ID/Ref Number
- Surname
- Minimum CV Ratings
- Show Accepted/Rejected Applicants

Highlighting an Applicant and clicking **SELECT** will take the user to the Applicant Maintenance Window.

## **Applicant Maintenance Window**

The user can now detail various aspects of the Applicant and maintain the interview location, dates, time etc. The user can move an individual Applicant through the recruitment flow if required.



Utilise the tabs on the side to navigate

The Maintenance window displays quick links on the right hand side.

The Task Summary will identify any upcoming/current and out of date tasks in regards to the opened record.

FUTURE TASKS	Also displayed:
Applied For: HR Officer Source: Internet Department: Human Resources	Post Applicant has applied for The application source Where the post is based (Location/Department)
Location: London Current Action: CV Received	The current Recruitment Flow Action which the user can respond to here The user can also quickly go to the Actions tab and view the Vacancy Details which will open in a separate window.
Respond All Actions Vacancy Details	

Clicking on the 'Future/Upcoming/Urgent Tasks' icon will open up the Task Summary window which displays tasks in relation to the record that is open.

#### Task Summary

🌨 💿 🗎 🍳 🕶 😸	🖾 🍈 🔻	Simply Pe	rsonnel - Vacancy Maintenance - POS123 - Payroll Manager [OPEN]	
HOME SYSTEM	I SETUP PERSONNEL TRAINING	<u>RECRUITMENT</u> REPORTS <u>UP</u>	DATES DOCUMENTS <u>H</u> ELP	
Cecruitment Dashboard Dashboard	Cancy Delete tenance Vacancy ancies	Transfer Delete Change Applicant Applicant Applicant Do	Il Merge Juseus List Denuents Task Online Recoultment	
Task List				
Personnel 🛕 Training 🖌	Recruitment			
Task Date 🛆	Task 🛆	Vacancy 🛆	Applicant 🛆	Owner Notes
	CV Received	SP 009	Mitchell, Adam	
29/10/2014	Awaiting Interview Date	SP 001	Poyser, Trevor Philip	ADMIN
20/04/2015	Forwarded to Recruiting Manager	001 LONDON	Smith, James	ADMIN
20/04/2015	Forwarded to Recruiting Manager	APP POOL	Smith, James	ADMIN
22/04/2015	Awaiting Interview Date	005 LINCOLN	Smith, James	ADMIN

Simply Personnel separates tasks for each module as per the tabs above.

Scroll down to the bottom of the task list to see the Task Summary features.

<u>P</u> rint <u>E</u> xport	The user is able to Print / Export this data to an external application should this data be required for business purposes.
E <u>m</u> ail	Click Email to send an email to either Applicant or Task Owner if associated against that specific task.
Respond	Applicants can be moved through the Recruitment Flow from here. The user clicks RESPOND if the task specifies a response is required.
Applicant Vacancy	Applicant / Vacancy maintenance windows can be accessed via the corresponding buttons.
<u>N</u> arrative	The user can also add Narrative information here.



The User can move the Task List to all edges of the screen and use the " 🖪 " to lock the list into place which will auto-hide when not in use.

#### Personal

<u>Main</u>

•	Applicant Maintenance - 49 - Green, Teresa [Pending]	×
Teresa Green Known As: Teresa	Main       ddress       Personal         Basic Details:	Payroll Manager Source: Internet Department: Payroll Location:
Personal Applicant Administration Documents Other	Rating: Rating: Comments: Suitable CV	London Current Action: Awaiting Interview Date Respond All Actions Vacancy Details

The Main tab will display the already populated fields when the Applicant was initially added.



To save the record, simply close down the window after making any changes

#### <u>Address</u>

٠	Applicant Maintenance - 49 - Green, Teresa [Pending]	×
Teresa Green Known As: Teresa	Main       Address       Personal         Address:	UPCOMING TASKS  Applied For: Payroll Manager Source: Internet Department: Payroll Location:
Personal Applicant Administration Documents Other		London Current Action: Awaiting Interview Date Respond All Actions Vacancy Details

The Applicants contact details can be changed from this tab.



The Email icon next to the email addresses, will allow the user to send an email to the Applicant using the default email client.

## <u>Personal</u>

٠	Applicant Maintenance - 49 - Green, Teresa [Pending]	– 🗆 🗙
Teresa Green Known As: Teresa	Main Address Personal Personal: Date of Birth: Age: Marital Status: Nationality: Ethnic Origin: Registered Disabled	! UPCOMING TASKS         Applied For:         Payroll Manager         Source:         Internet         Department:         Payroll         Location:
Personal Applicant Administration Documents Other	Import Clear	London Current Action: Awaiting Interview Date Respond All Actions Vacancy Details

Personal details for the Applicant can be loaded on to this tab if necessary.

## **Applicant**

#### Events 1-2 & 3-4

•	Applicant Maintenance - 49 - Green, Teresa [Pending]	×
Teresa Green Known As: Teresa	Events 1-2       Events 3-4       Reference 1       Reference 2       Actions         Event 1.       Type:       Event 2:       Type:       Type:       Type:         Datg:       31/07/2015       .       Date:       Type:       Date:       Type:         Image:       09:00        Location:       Meeting Room 1       Location:       Location:       Participants:       Charles Abbey         Add       Add       Add       Add       Add	POPCOMING TASKS      Applied For:     Payroll Manager     Source:     Internet     Department:     Payroll     Location:
Personal Applicant Administration Documents Other		Location: London Current Action: Awaiting Interview Date Respond All Actions Vacancy Details

Tabs 'Events 1-2 and 3-4' allow the user to input any details in regards to Interviews, Practical Exercises, Telephone Interview, a few examples of events which data can be merged to document / email templates created within Recruitment Manager.

#### Reference 1 & 2

•	Applicant Maintenance - 49 - Green, Teresa [Pending]	×
	Events 1-2 Events 34 Reference 1 Reference 2 Actions	4. UPCOMING TASKS
	Sumame:         Lingard         Address:         1 High St           Forenames:         Claire         Town	Applied For:
Teresa Green Known As:	Title: Ms  County Position: HR Manager	Payroll Manager Source: Internet
Teresa	Organisation:         A Company           Telephone:         01255 545454         Postcode:         AD123DE	Department: Payroll
	Relationship: Manager	Location: London
Personal Applicant		Current Action: Awaiting Interview Date
Administration		Respond
Documents Other		
		All Actions
		Vacancy Details

Tabs 'Reference 1 and 2' allow the user to input any details in regards to the Applicants reference details supplied with their application for a Vacancy.

As mentioned before, these can be used for document and email templates if necessary.

#### <u>Actions</u>

٠	Applicant Maintenance - 49 - Green, Teresa [Pending]	– 🗆 🗙
	Events 1-2 Events 3-4 Reference 1 Reference 1 Actions	1 UPCOMING TASKS
	Tasks Action Date Created Closed Date Action Response	
	✓ 31/08/2015 24/07/2015 24/07/2015 CV Received -	Applied For:
	27/07/2015 24/07/2015 24/07/2015 Forwarded to Recruiting Manager CV Suitable           27/07/2015 24/07/2015 24/07/2015 Invite to 1st Intension	Payroll Manager
Teresa Green	31/07/2015 24/07/2015 Awaiting Interview Date	Source:
Known As:	<b>a</b> //	Internet
Teresa		Department:
		Payroll
		Location:
		London
Personal		Current Action:
Applicant		Awaiting Interview Date
Administration		
Administration		Respond
Documents		
Other		
	▲	
	✓ Include closed actions     Convert   Respond   Narrative   Add   Delete	All Actions
		Vacancy Details

This tab shows where the Applicant is in the Recruitment Flow. From here the user can move the Applicant through the flow by clicking RESPOND.



The Action Code Reponse process is explained in the Vacancy Maintenance section under 'Open Actions'.

The user can also add Narrative information in regards to the current Applicant's status, and also manually amend the Recruitment Flow for this Applicant by deleting and adding actions as necessary.

## **Administration**

<u>Notes</u>

٠	Applicant Maintenance - 49 - Green, Teresa [Pending]	– 🗆 🗙
	Notes Notes: 22 🛃 🐚 🕉 🛍 副 喜 喜 喜 B I U S   譯 譯 📆 🎸	1 UPCOMING TASKS
	n a 📾 🔚 🗄 🗒	Applied For:
Teresa Green Known As: Teresa	Notes about the Applicant	Payroll Manager Source: Internet Department: Payroll Location:
Personal		Current Action:
Applicant		Awaiting Interview Date
Administration		Perpend
Documents		Respond
Other		
	Rejection Reason: Status: Pending •	All Actions Vacancy Details

The Notes section allows the user to input any details regarding the Applicant here.

This tab will also show Rejection Reasons for previous Applicants with the corresponding Status.

#### <u>Costs</u>

٠	A	pplicant	: Maintenance - 49 - G	reen, Teresa [Pending]	– 🗆 X
	Notes Costs	ualifica	tions		L UPCOMING TASKS
	Date	Cost	Cost Type	Description	-
	24/07/2015	10.00	Applicant Cost	Food & Drink	Applied For:
					Payroll Manager
Teresa Green					Source:
Known As:					Internet
Teresa					Department:
					Payroll
					Location:
					London
Personal					Current Action:
Applicant					Awaiting Interview Date
Administration					Demond
Documents					Respond
Other					
		. —	10.00		
	Applicant Tota	al:	10.00	Add Update Delete	
					Vacancy Details

Any costs associated with the Applicant can be recorded here. Click **ADD** to add the cost and select the type in the pop up window.

## **Qualifications**

•	Applicar	nt Maintenance - 49 - (	Green, Teresa [Pending]	×
	Notes Costs Qualific	ation		I UPCOMING TASKS
	Qualification	Subject	Date Passed Grade	Expi
	GCSE	English	26/07/1990 C	Applied For:
	GCSE	Maths	26/07/1990 B	Applieu Fol.
Teresa Green				Source'
Known As:				Internet
Teresa				Department:
				Payroll
				Location:
				London
Personal				Current Action:
Applicant				Awaiting Interview Date
Administration				Respond
Documents				
Other				
	4	Ш	$\sim$	•
			AddDelet	e All Actions
				Vacancy Details

Any Qualifications associated with the Applicant can be recorded here. Click **ADD** to add the Qualification and select the type in the pop up window.

## **Documents**

#### **Documents**

•	Applicant Maintenance - 49	- Green, Teresa [Pending]		– = ×
	Documents Mail Merge			L UPCOMING TASKS
	Document Group: < <all>&gt;</all>	· · · · · · · · · · · · · · · · · · ·		
	Date Created Description 24/07/2015 Invite to 1st Interview email	Group Li led at 24	inked Docur Micros	Applied For:
T			La micro.	Payroll Manager
Teresa Green				Source:
Known As:				Internet
leresa				Department:
				Payroll
				Location:
				London
Personal				Current Action:
Applicant				Awaiting Interview Date
Administration				
Documents				Respond
Other				
	<ul> <li>■</li> </ul>		•	
	Email Mail Merge New Doc Inser	t <u>P</u> roperties <u>A</u> ctivate	D <u>e</u> lete	All Actions
				Vacancy Details

Applicant Documents can be stored and created here. Emails can also be sent to the Applicant and saved against the record for historic purposes.



Creating document process can be found within the Vacancy Maintenance section.

#### Mail Merge

٩	Applicant	Maintenance	- 49 - Green, Teresa [Pending]		– 🗆 🗙
	Documents Mail Merge				I UPCOMING TASKS
	Action Date Produce	d Date Produc	Template	Action Date Proc	
	M	24/07/2015	Invite to 1st Interview		Applied For:
	31/07/2015		Interview 1 confirmation	31/07/2015	Applied For.
Teresa Green	31/08/2015		Standard application form + letter	31/08/2015	Source
Known As:					Internet
Teresa					Department:
					Pavroll
					Location:
					London
Personal					Current Action:
Applicant					Awaiting Interview Date
Administration					Respond
Documents					
Other					
	•			•	
	Include produced lette	ers	Produce	e. D <u>e</u> lete	All Actions
					Vacancy Details

Moving Applicants through the Recruitment Flow via Action Codes (if setup), Simply Personnel will use the document / email template associated with an Action Code and prepare the document and save this in the Mail Merge tab to be produced at a later stage.

Select the document by highlighting it as above and click **PRODUCE**.

#### <u>Other</u>



Simply Personnel has a Screen Designer feature that will allow the user to create a bespoke page to input data on to a record which cannot be recorded on the pre-defined fields.

Please see the Screen Designer Guide for more details.

## **Reports**

•	Dashboard – 🗆 🗙
Recruitment Manager	
🔀 System Setup	Task Summary
C Existing Applicant	1 4 URGENT TASKS
New Applicant	1 UPCOMING TASK     1 FUTURE TASK
Existing Vacancy	
New Vacancy	Print Letters
Reports	Online Recruitment
Back	

This section of the software allows users to report on Vacancies, and the Applicants associated with a Vacancy etc. There are cost summary reports and budget analysis reports.

#### Pre-Defined Reports

Financial Summary       Adminis         Cost Type Analysis       Gender M         Vacancy Cost Details       Vacancy         Cost Type Analysis by Vacancy       Vacancy         Analysis Code Summary       Disabled	tration
Financial Summary       Adminis         Cost Type Analysis       Gender M         Vacancy Cost Details       Vacancy         Cost Type Analysis by Vacancy       Vacancy         Analysis Code Summary       Disabled	tration
Financial SummaryAdminisCost Type AnalysisGender MVacancy Cost DetailsVacancy ICost Type Analysis by VacancyVacancy IAnalysis Code SummaryDisabled	tration
Cost Type AnalysisGender NVacancy Cost DetailsVacancyCost Type Analysis by VacancyVacancyAnalysis Code SummaryDisabled	lix Report
Vacancy Cost Details     Vacancy       Cost Type Analysis by Vacancy     Vacancy       Analysis Code Summary     Disabled	in the port
Cost Type Analysis by Vacancy     Vacancy       Analysis Code Summary     Disabled	Details Report
Analysis Code Summary Disabled	Summary Report
	Representation Report
Cost Type Analysis Summary Ethnic Re	presentation Report
Cost Type Analysis by Vacancy Summary Age Profi	le Report
Applicant	Details

The user can select any of the pre-defined reports above



The user can then select from the following window (this differs per report) to customise what the report should show.

Click **PRINT** to see the Report

The S Recr Vacano Depart Locatio Open Vacano	Simpl uitme cy Ref : ment : < on : < <a cy Refer</a 	y HR nt Va POS12 < <all> LL&gt;&gt; rence :</all>	Soft canc <sup>3</sup> > POS12	ware Co cy Detai	ompan Is Rep	y l or	Ltd t			
Vacancy Re	eference :	POS123			Departmen	t:		Payroll		
Post :		Payroll Ma	anager		Location :			London		
Status :		OPEN								
Creation Da Closing Dat Target Date	ate: te: e:	24/07/201 31/08/201 N/A	5 5		Salary Ban Specific Sa Employme	d : lary : nt Typ	e:	Band 2 £28,000 Full Time		
Advert	ising									
Date	Description			Provider			Source			
24/07/2015 24/07/2015	Advertisment Website	t		Yorkshire Post Ne Howard Jackson	ewspaper Agency		Newspa Internet	per		
Costs										
Date	Cost Type		Descriptio	on		Cost				
24/07/2015 24/07/2015	Interview Roo Magazine Ad	om Hire Ivertisement	Outsource Colour Adv	d vert			300.00 250.00 550.00			
Applica	ants									
Applicant Reference		Appl	icant Name	e Rejecte	ed <u>Reason fo</u>	r Reje	ction			

#### Simply Answers

ceruitment reports	
Financial Summary	Administration
Cost Type Analysis	Gender Mix Report
Vacancy Cost Details	Vacancy Details Report
Cost Type Analysis by Vacancy	Vacancy Summary Report
Analysis Code Summary	Disabled Representation Report
Cost Type Analysis Summary	Ethnic Representation Report
Cost Type Analysis by Vacancy Summary	Age Profile Report
	Applicant Details

As above at the bottom of the pre-defined reports list, select Simply Answers. Users can define what fields to report on.

Simply Answers	Singly from	
File Query Help	and Owner Free DR - 🖓 Drink 🤗 Free at To Freed - 💆 Cheek 🚳 Land Owner Free Web. 🥅 Or	un Ourse - The Delate Existing Ourse - Ourse Ordinana
Employee     Berguitment	Dad Query from Dis Cal Print Cal Export to excel So Chart So Load Query from Web Cal So	re Query 🙀 Delete Existing Query Query Options •
U: Hocurament G: Trannig G: Auding	simplypersonel	1ply Answers         uick, Easy access         your information         Tutorial Video         Getting Started Guide         in Guery         Getting Started Guide         in Guery         Getting Started Guide         in Guery         Getting         in Guery         Guery         Getting         Guery         Guery
	SQL to be used for this query:	

Simply Answers opens up in a separate window:

From here the user can decide to create a New Query, Open an Existing or view Online Queries.

#### New Query

After selecting New Query, the user double ticks the data required for the query from the left hand menu.



The data fields selected are identified with a green tick as per the example.

Clicking the "+" icon next to a field expands that section showing more fields for the user.

Once all fields have been selected for the query, the user then clicks on the *Run Query* button which displays the query:

ApplicantID	Σ⊽≠ Forename Σ	⊽ 中 Surname Σ	7 ≠ Source Σ ⊽	-⊨ VacancyRef ∑	'∇+¤ Post Σ ∇⊀
28	Cat	Briggs	Newspaper	REF00002	HR Officer
29	James	Smith	Newspaper	000014	HR Officer
30	Roy	Fenwick	Newspaper	000014	HR Officer
31	Sam	Jones	Internet	000015	Secretary
32	Jane	Brown	Newspaper	000015	Secretary
33	Sandra	Robberts	Intranet	AD1	Admin Assistant
34	Sarah	Burns	Internet	AD1	Admin Assistant
35	Simon	Taylor	Newspaper	AD1	Admin Assistant
36	Robert	Key	Internet	AD1	Admin Assistant
37	James	Smithe		AD1	Admin Assistant
38	Trevor	Poyser		SP 001	Administrator

Data can be filtered out by clicking the  $\overline{\ }$  filter icon.

The **D** feature allows the user to select a numerical summary in regards to the column selected i.e. Count, Average, Minimum etc...



To export the report to Excel, select export to excel. To create charts, ensure the query has firstly been run, and then select Chart. Users can save the report template using the Save query function.

Selecting Load Query from web will take the User to a list of additional reports.



If running a report to show Leavers, update Query Options to show Leavers otherwise Simply Answers defaults to only show Live Employees / Applicants.

## **Print Letters**

	Dashboard – 🗆 🔿
Recruitment Manager	
🔀 System Setup	Task Summary
😪 Existing Applicant	4 URGENT TASKS
New Applicant	1 UPCOMING TASK      1 FUTURE TASK
Existing Vacancy	
New Vacancy	Print Letters
Reports	Online Recruitment
Back	

Print Letters allows the user to produce any documents for the Applicants loaded against any Vacancy without having to go into the individual records.

<b>)</b>	Mail Merge Queue		– 🗆 X
- Select Range:			Chow
<u>0</u> wner:	< <all>&gt;</all>	•	i snow j
T <u>e</u> mplate:	Invite to 1st Interview	•	Ennt

The Mail Merge Queue window opens up and user selects the type of document to produce.

Click SHOW

۵	Recruitment Mail Merge Letters –		
Template	Vacancy	Applicant	Owner
Invite to 1st Interview	005 LINCOLN	(48) Smith, James	ADMIN
Invite to 1st Interview	SP 001	(38) Poyser, Trevor Philip	ADMIN
Invite to 1st Interview	SP 004	(44) Mitchell, Adam	ADMIN
	$\frown$		

Simply Personnel displays the documents associated with that template.

The user can multi-select several document and then click **PRODUCE** for further options in regards to printing directly, emailing or reviewing the document(s).

## **Online Recruitment**

•	Dashboard – 🗆 🗙
Recruitment Manager	
🔀 System Setup	Task Summary
See Existing Applicant	4 URGENT TASKS
New Applicant	1 UPCOMING TASK      1 FUTURE TASK
Existing Vacancy	
New Vacancy	Print Letters
Reports	Online Recruitment
Back	

Please contact a member of the Support team in regards to setting up Online Recruitment.

Any Vacancies created in Simply Personnel can be shown online if required to. The website mirrors across the Vacancies that have been posted ensuring the "Show on Web" option is ticked.

Online Settings:				
Show Vacancy From:	24/07/2015			
Show Vacancy To:	31/07/2015			
Number of Vacancies:	5			
First Action:				
CV Received	•			

This is accessed in the Vacancy Maintenance Window -> Main tab.



Applicants can also submit a covering letter and CV through Online Recruitment.

## My Notes: