Simply Personnel – Recruitment Manager

Simply Personnel

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Simply Personnel 12.8.0.1

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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

Version 1

Recruitment Manager   Page | 3   Build 12.8

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...
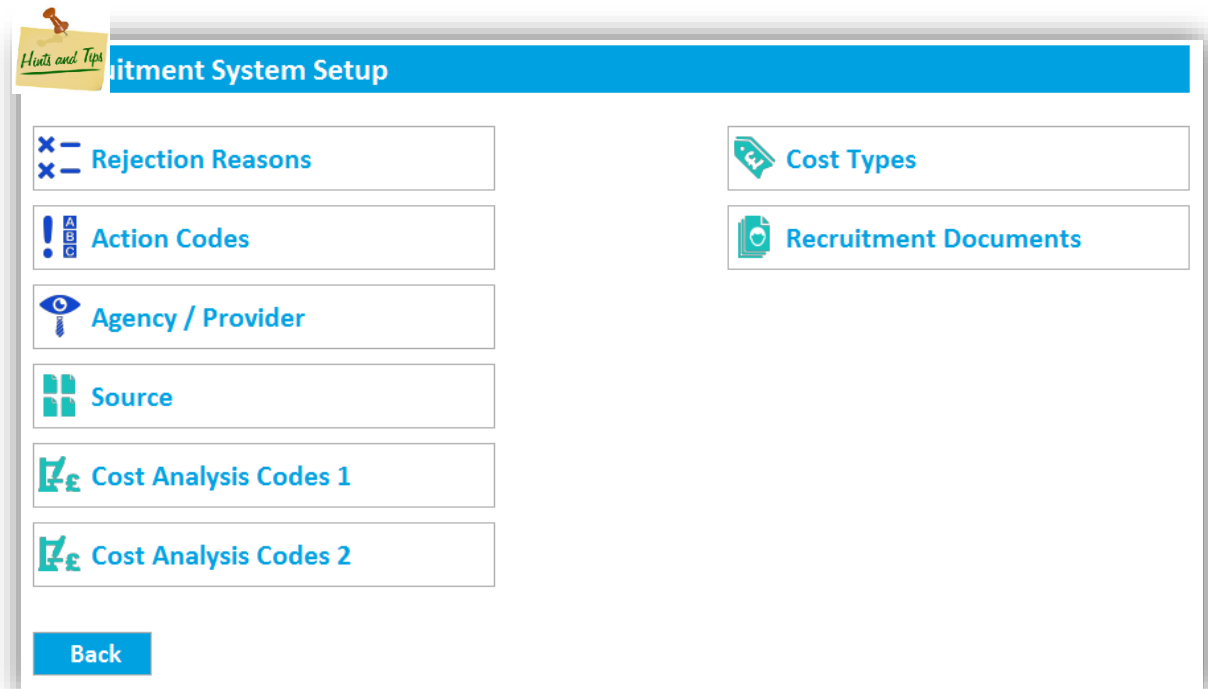
The user will see an "**In Use**" tick box throughout the system setup, this allows the user to add the appropriate element to the system, taking this "Out of Use" saves this in the background but the user will be unable to run reports/select this element based on this criteria.
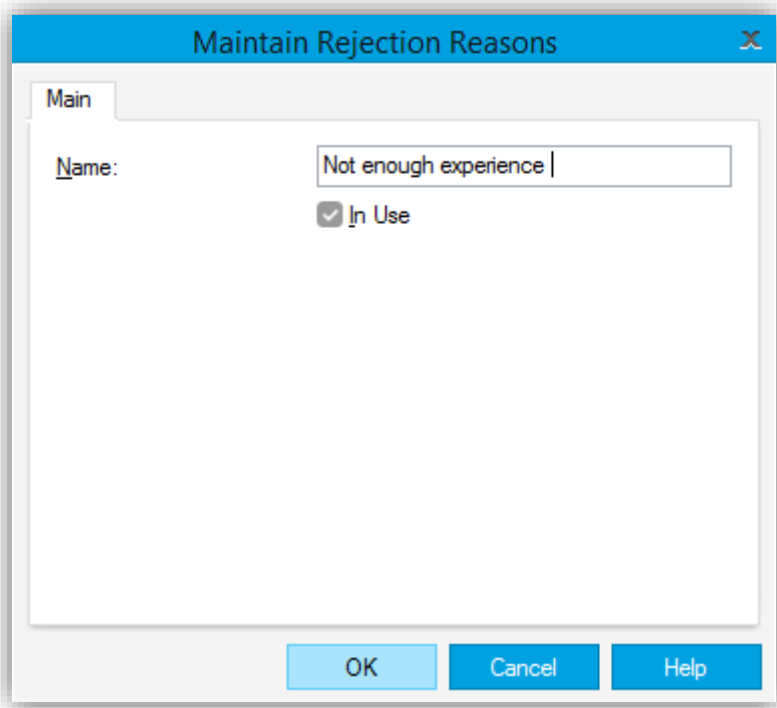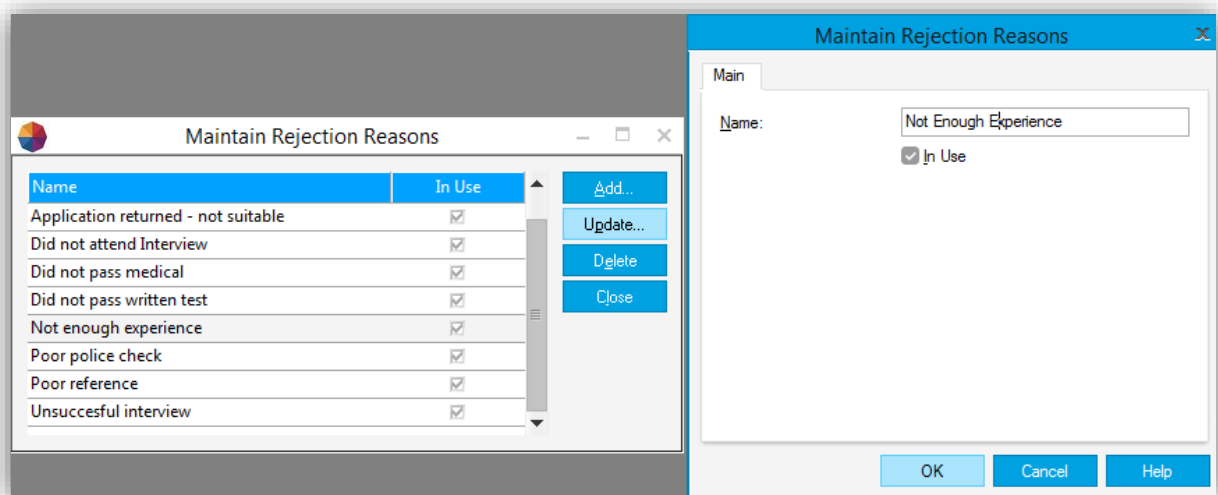
Rejection Reasons
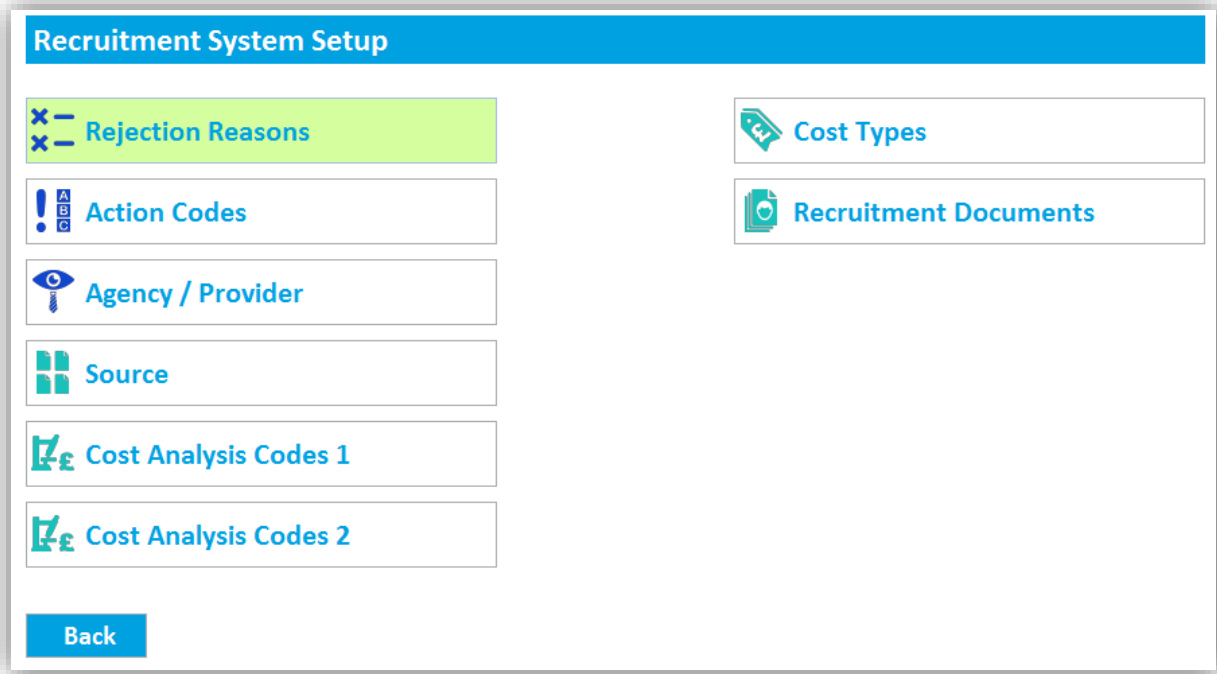
This area allows a user to define the different Rejection Reasons that will be recorded against the Applicants record whilst going through the recruitment flow.
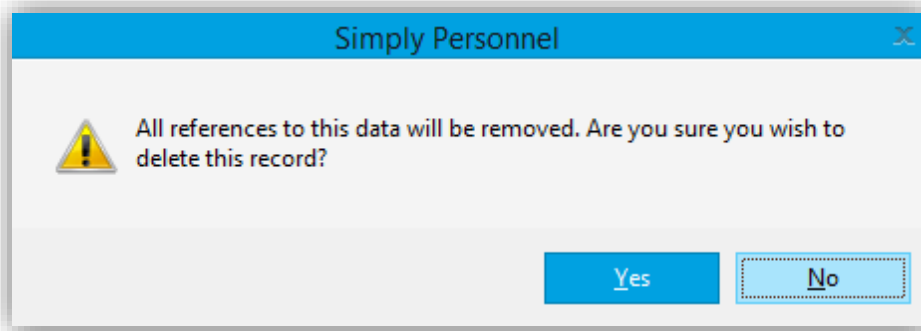

Add: Allows the user to ADD different rejection reasons

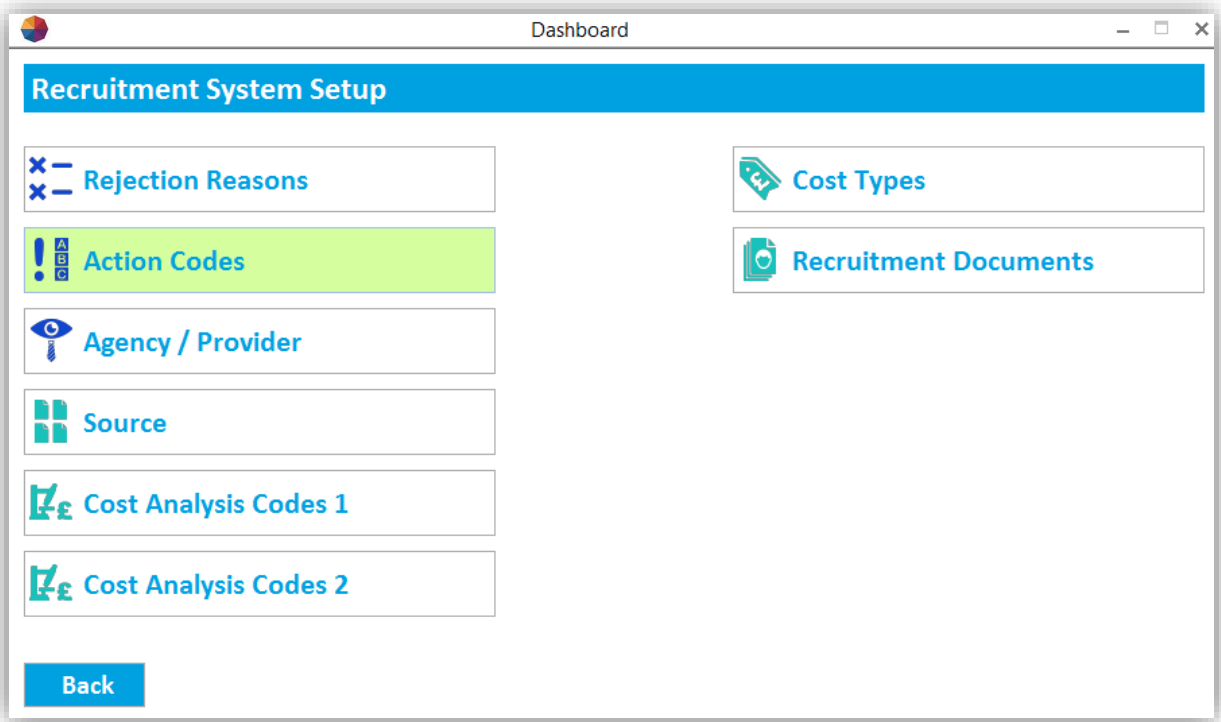**Update**: Allows the user to amend previous entries

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 it will be lost.

Action Codes
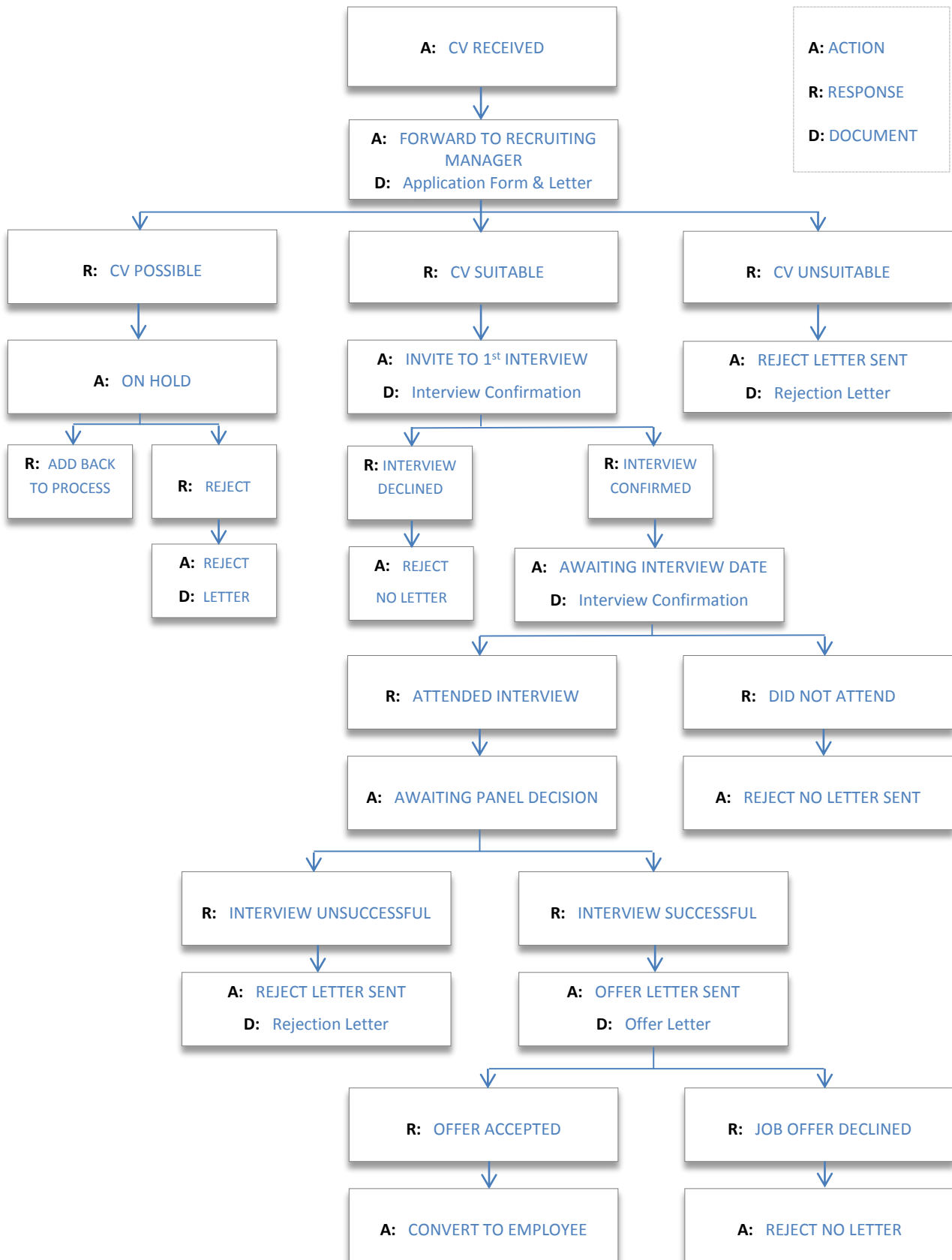

This area allows users to setup the Recruitment Flow which is bespoke to their company needs from receiving a CV to converting a potential Applicant into an Employee.
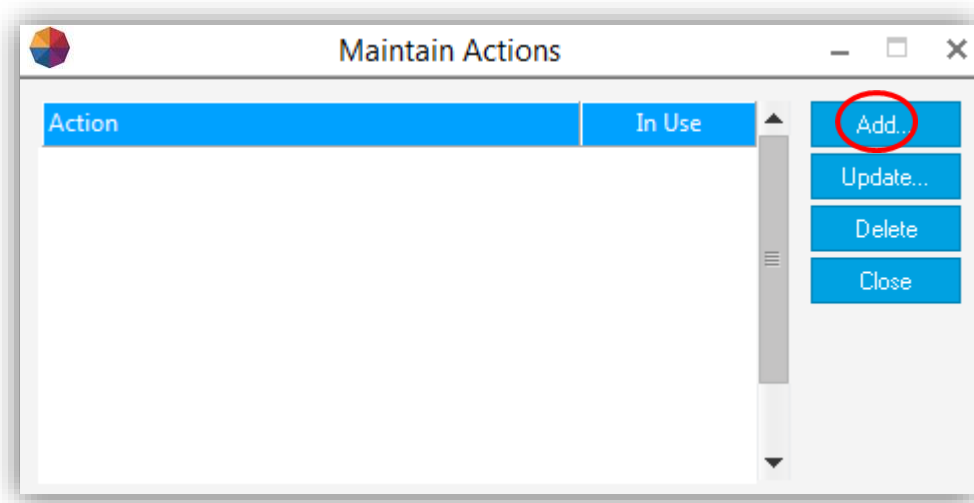
Before adding any Action Codes to the system, it would be beneficial to draw out the company's current recruitment flow and split them into 3 sections: Action / Responses / Documents

Please see the example on the next page

Recruitment Flow

A: CV RECEIVED

A: FORWARD TO RECRUITING MANAGER
D: Application Form & Letter

A: ACTION
R: RESPONSE
D: DOCUMENT

R: CV POSSIBLE

R: CV SUITABLE

R: CV UNSUITABLE

A: ON HOLD

A: INVITE TO 1st INTERVIEW
D: Interview Confirmation

A: REJECT LETTER SENT
D: Rejection Letter

R: ADD BACK TO PROCESS

R: REJECT

R: INTERVIEW DECLINED

R: INTERVIEW CONFIRMED

A: REJECT
D: LETTER

A: REJECT NO LETTER

A: AWAITING INTERVIEW DATE
D: Interview Confirmation

R: ATTENDED INTERVIEW

R: DID NOT ATTEND

A: AWAITING PANEL DECISION

A: REJECT NO LETTER SENT

R: INTERVIEW UNSUCCESSFUL

R: INTERVIEW SUCCESSFUL

A: REJECT LETTER SENT
D: Rejection Letter

A: OFFER LETTER SENT
D: Offer Letter

R: OFFER ACCEPTED

R: JOB OFFER DECLINED

A: CONVERT TO EMPLOYEE

A: REJECT NO LETTER

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

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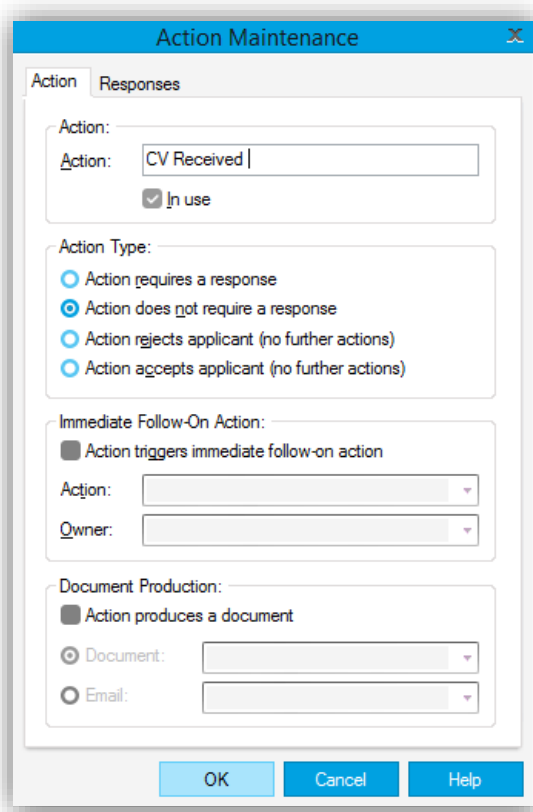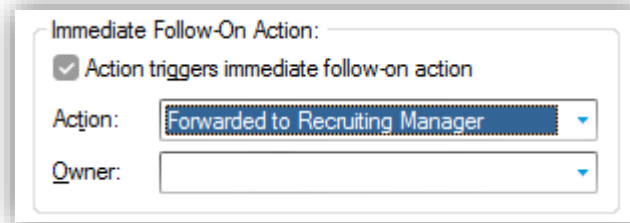

The user only has to label the Action name as shown opposite. The other settings can be added at a later time.

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.
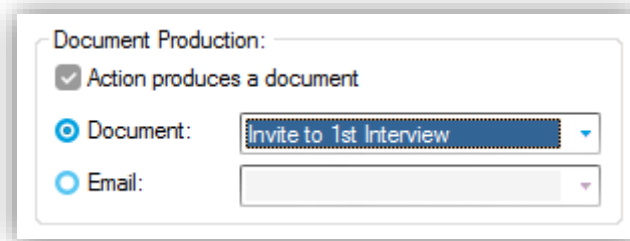

The user can not only set the immediate follow on action (or the next step of the Recruitment Flow), they can select a specific 'Owner'. This is another user on Simply Personnel, so one specific user can manage specific actions, or leave this field blank.
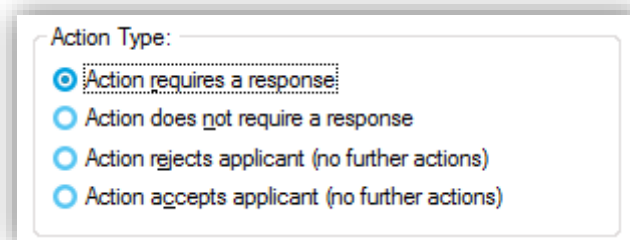
The user can also specify that when a certain Action is reached the system can automatically populate a template previously created in the system. Please see the Recruitment Documents section for details.

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.
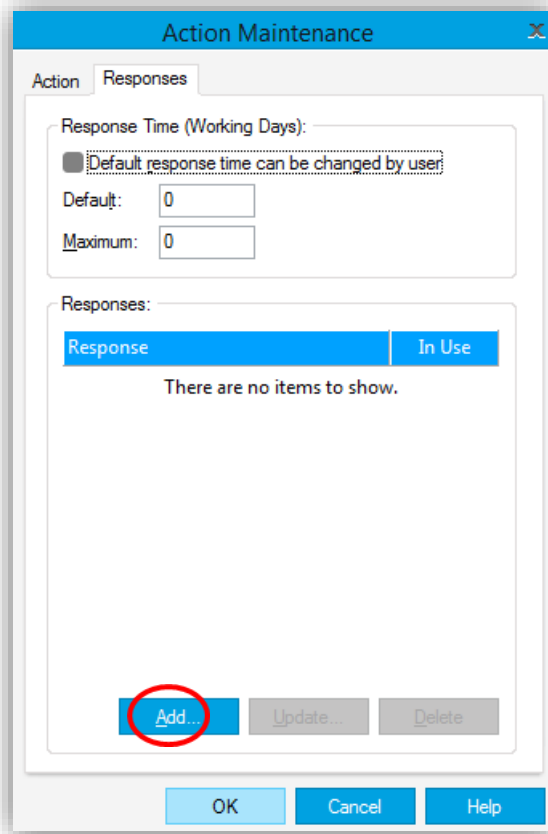

In 'Action Type' select 'Action Requires a Response'

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:
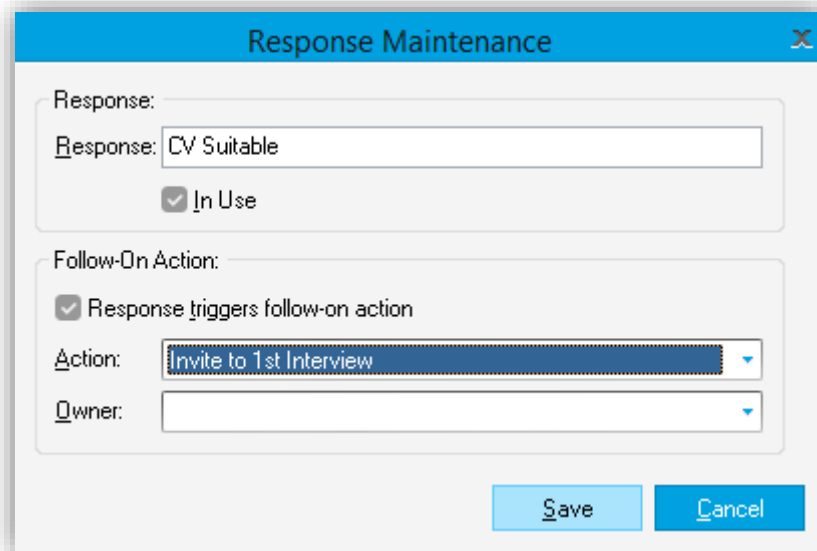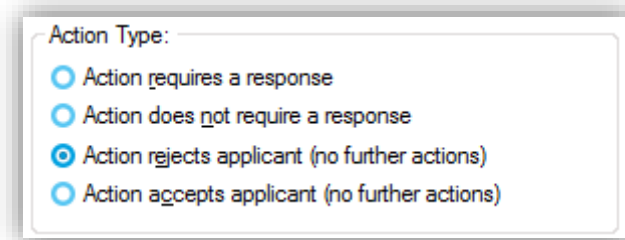
CV Possible

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.

The user can now follow and set up the different Action Codes that relate to the bespoke Recruitment Flow.
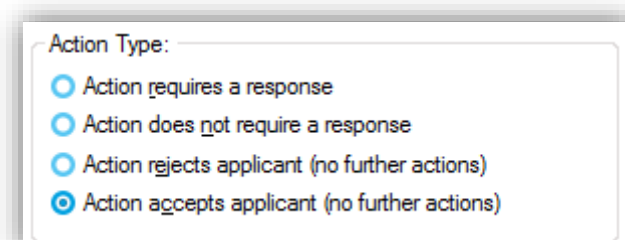
There are several areas on the Recruitment Flow where there is no follow on action i.e. Accept / Reject Applicant.

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

The above Action Type will also stop the Recruitment Flow and accepts the Applicant as above
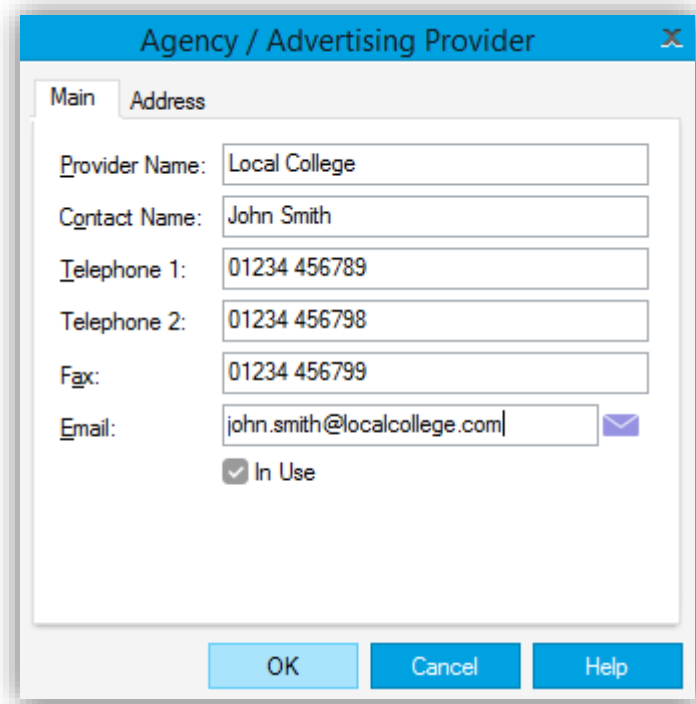
Agency / Provider
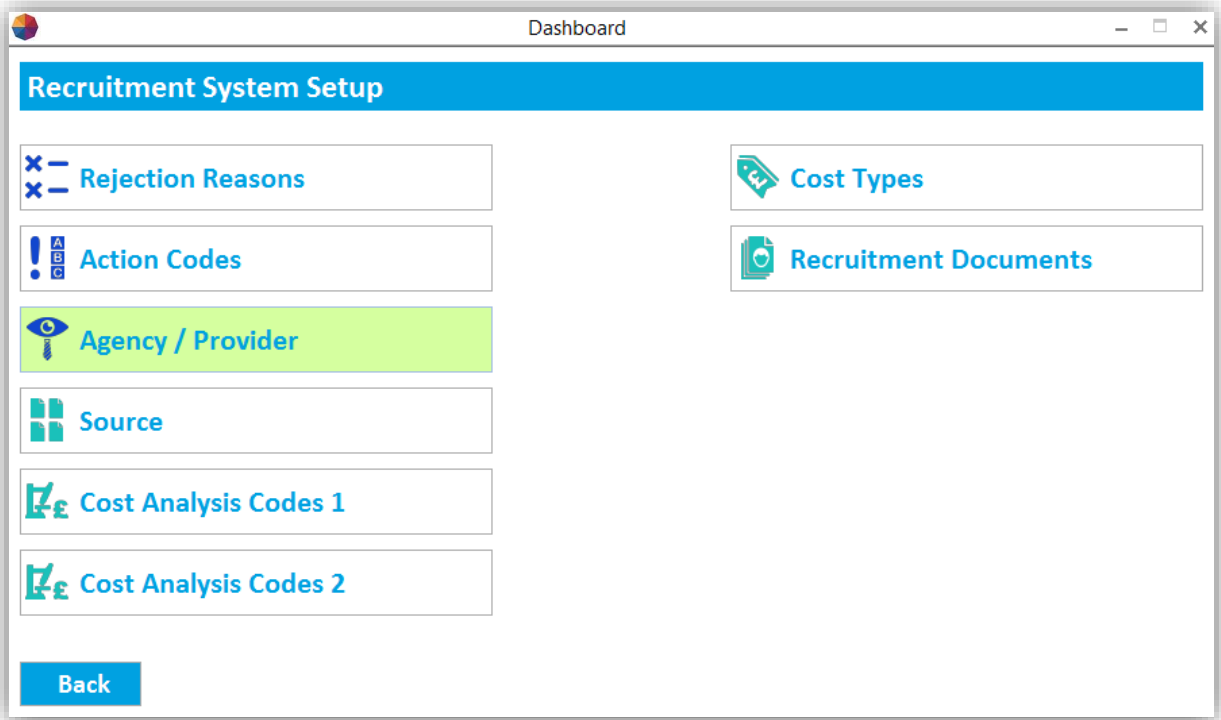
Agency / Provider allows the user to keep a log of all addresses and contact details for different agencies and providers used for Recruitment.

 This feature is completely optional as is not essential to complete the Recruitment Manager System Setup
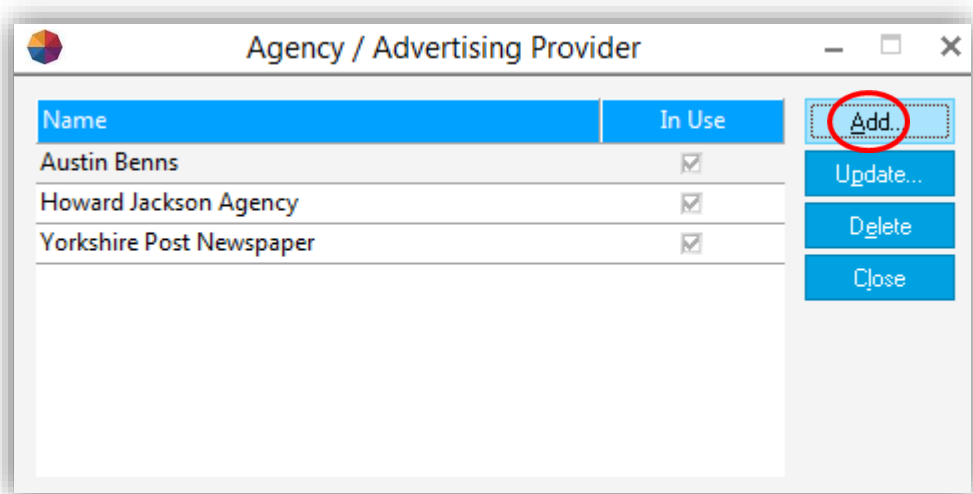
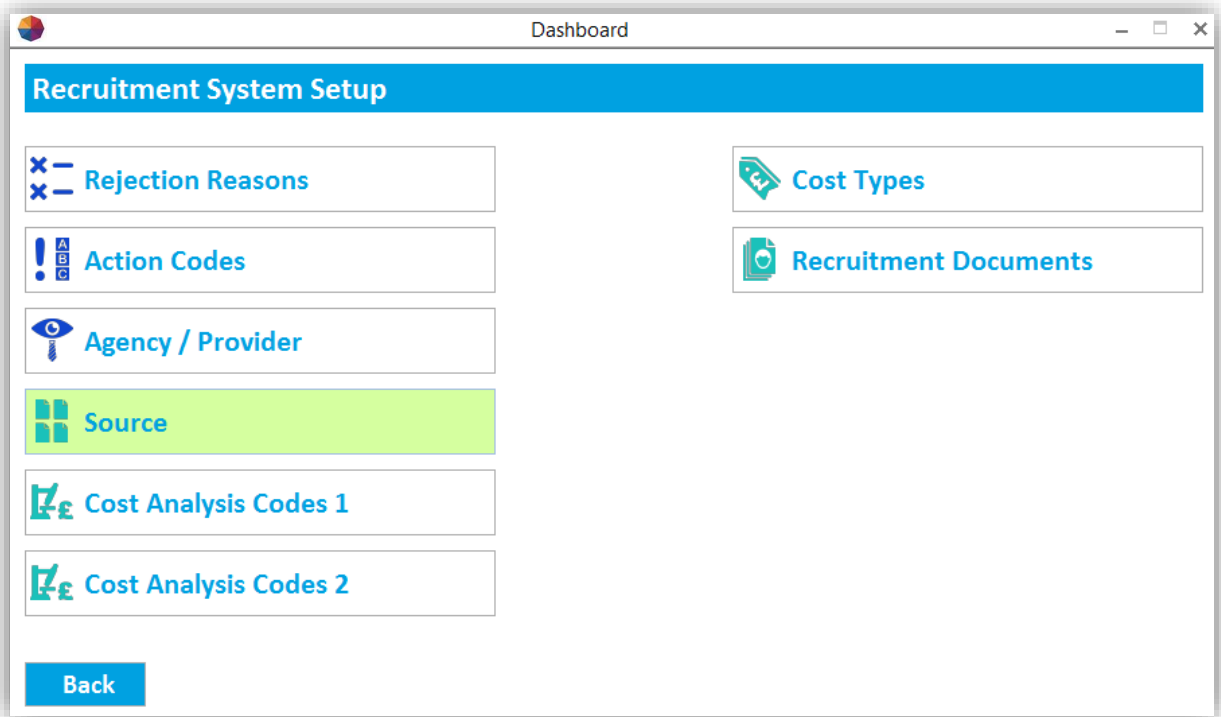Click on **ADD** to enter the details for the different Agency / Provider as per the following screenshot:

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

Source

The user can also add the different type of sources of the origin of the Applicant, e.g. Internet, Newspaper, Agency, Magazine etc…
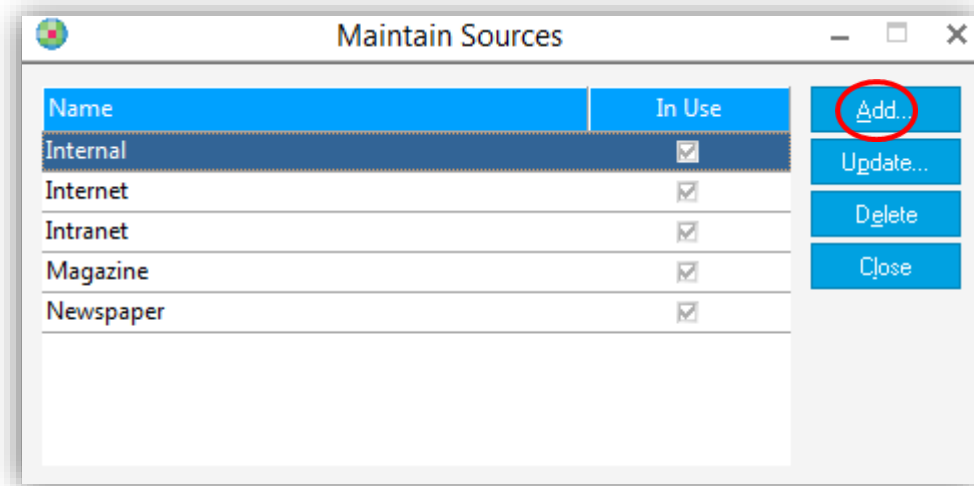
Similar to the Agency / Provider section, click on **ADD** and enter the different sources

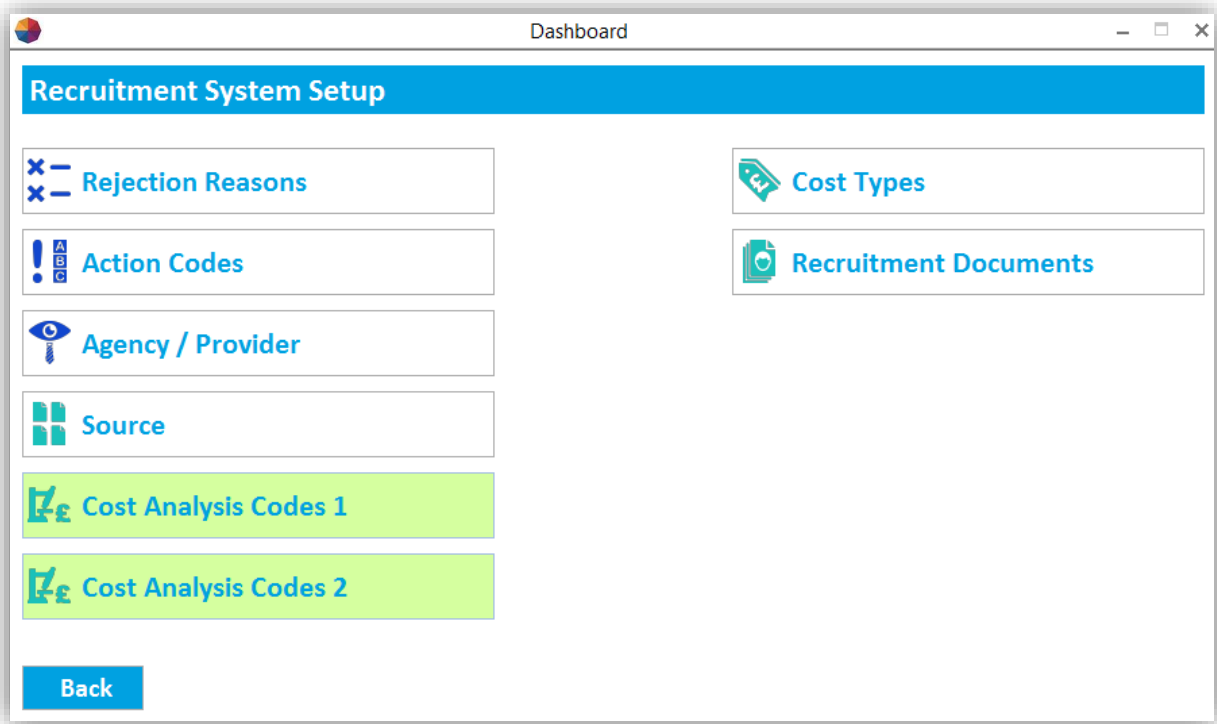This is also an optional section and is not mandatory to complete the setup.

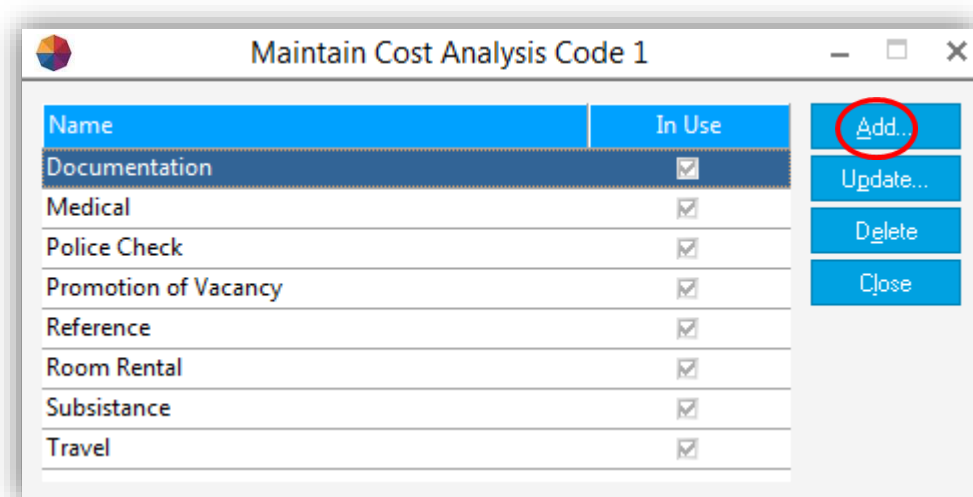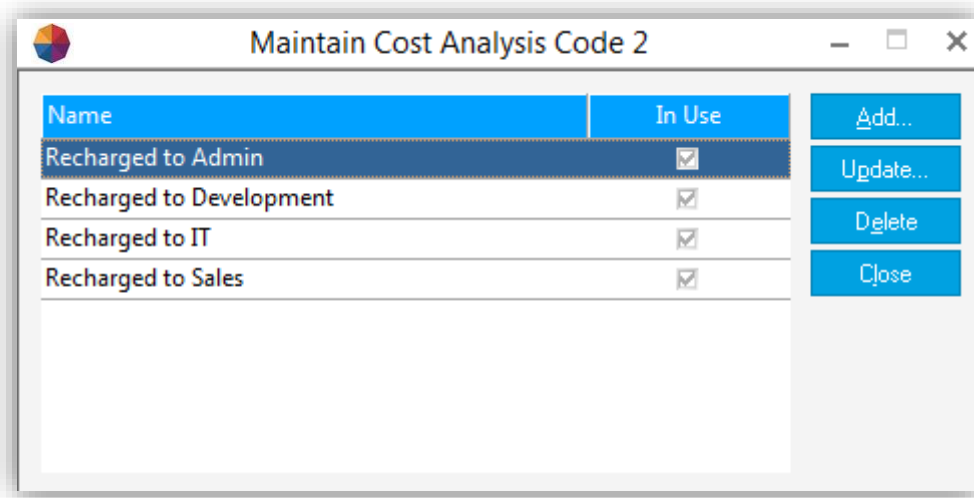## Cost Analysis Codes 1 & 2

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:


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.

The Analysis Codes are completely optional and should only be populated if there is a requirement to do so.
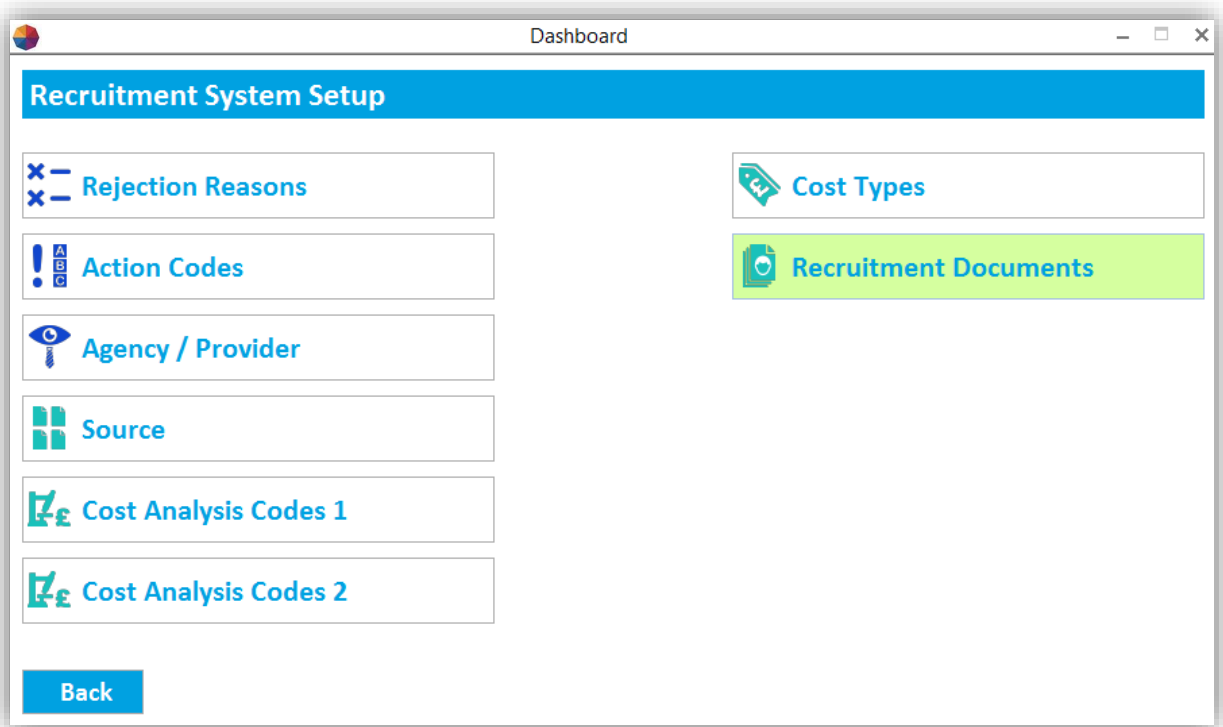
Cost Types
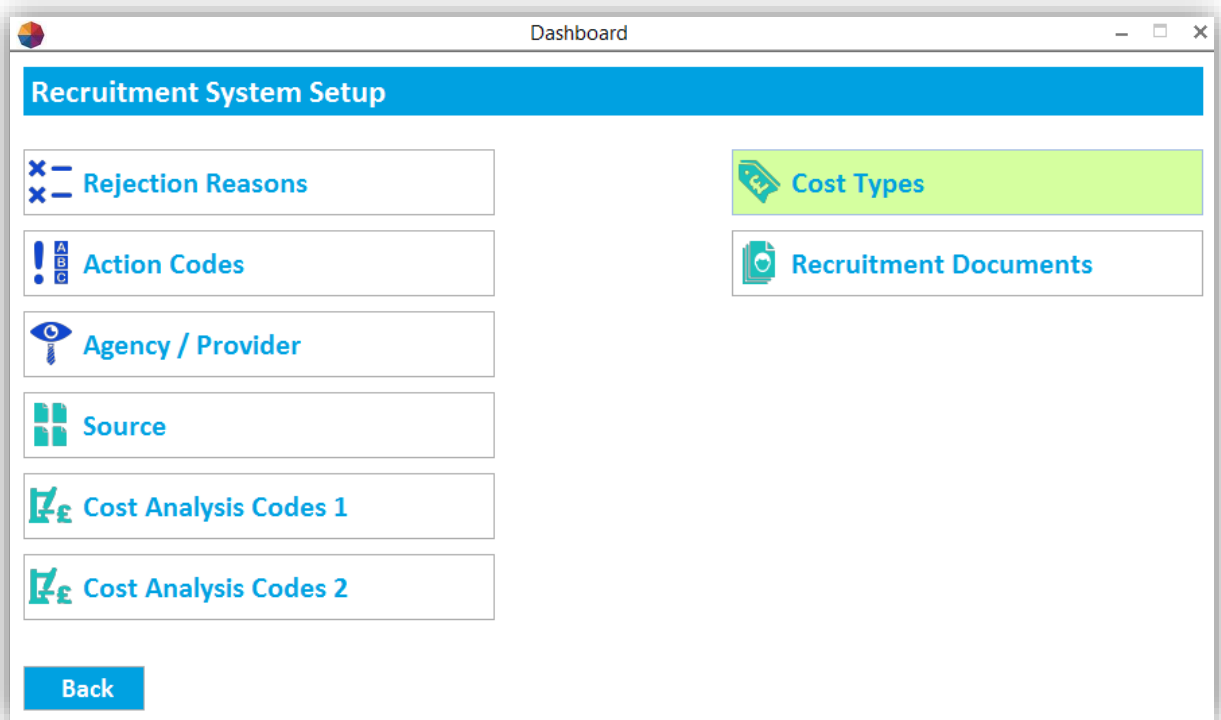
As mentioned previously, Cost Types are associated with the Cost Analysis Codes. These are more generic and should mainly be used to detail how much it has cost the company to Recruit and setup Vacancies.
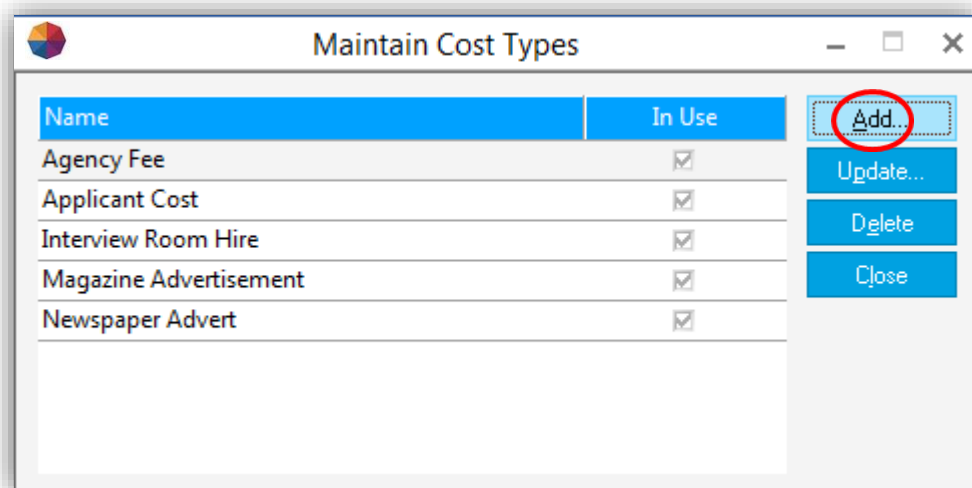
Click on **ADD** to add the different Cost Types associated with Recruitment.

Recruitment Documents

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'
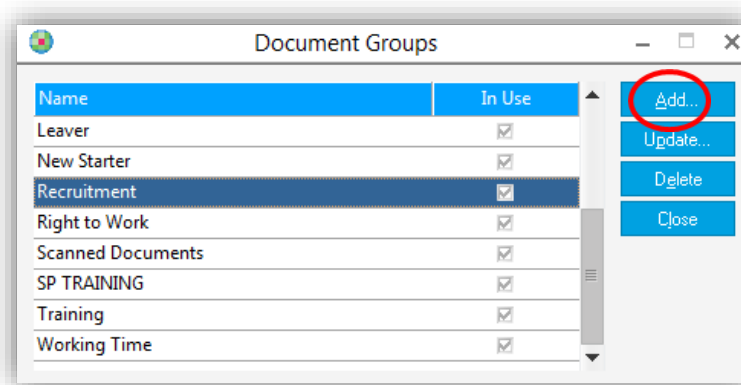
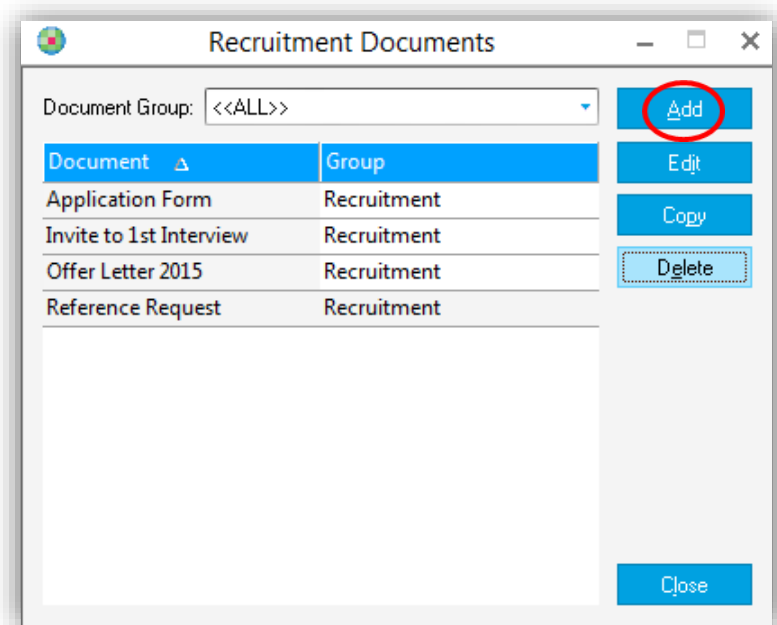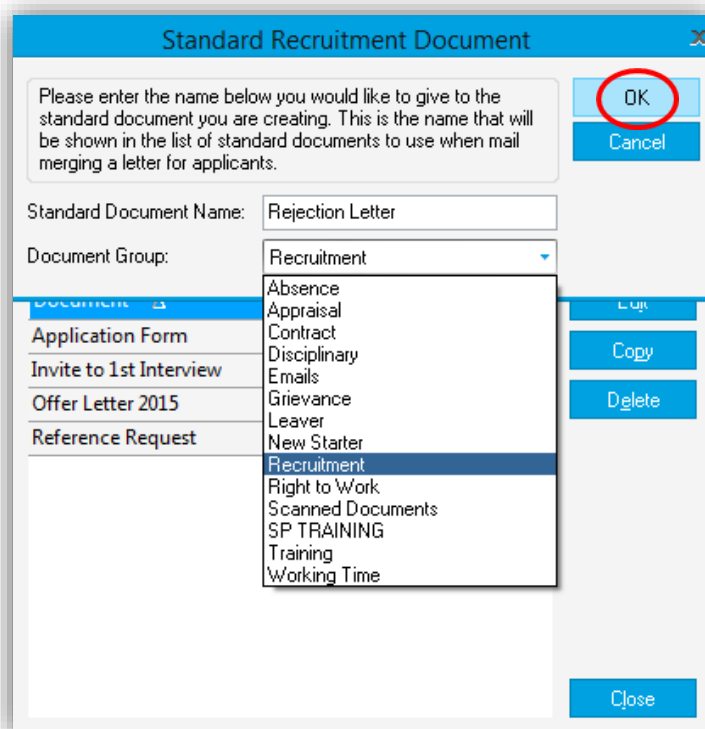After setting   up the group

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.

Click **ADD** to add a new template

The user can now enter a name for the template e.g. Rejection Letter, and specify which group this template resides i.e. 'Recruitment'
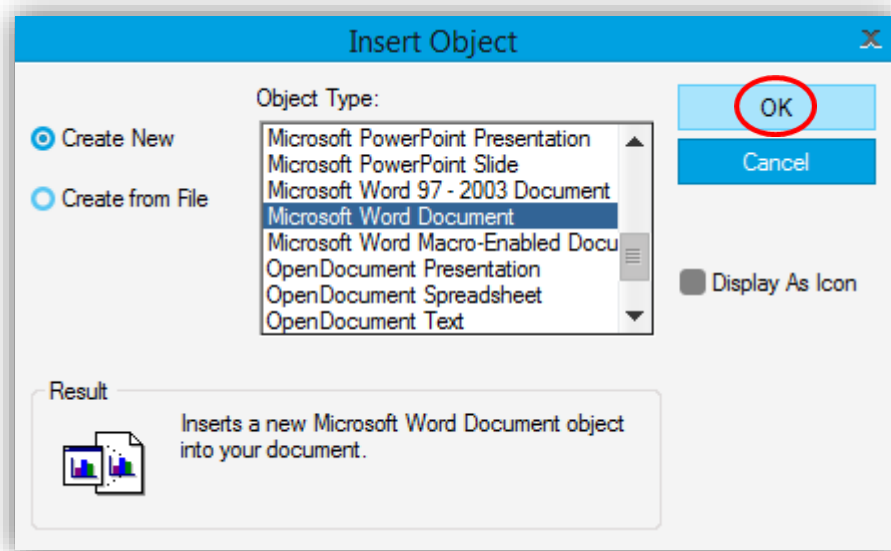
Simply Personnel will not allow duplicate names, for past/future templates it is worth specifying the year they were made; 2014, 2015, 2016 etc…
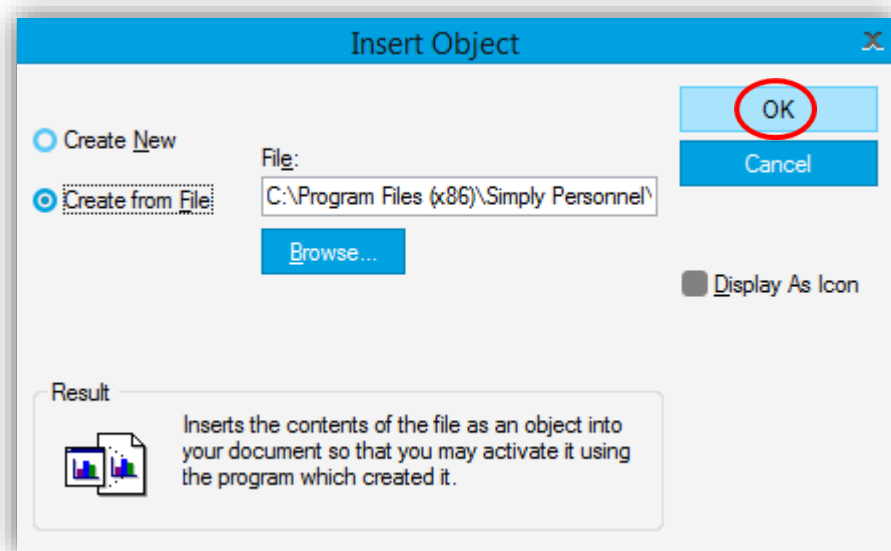
Click **OK**

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

Create New

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**.
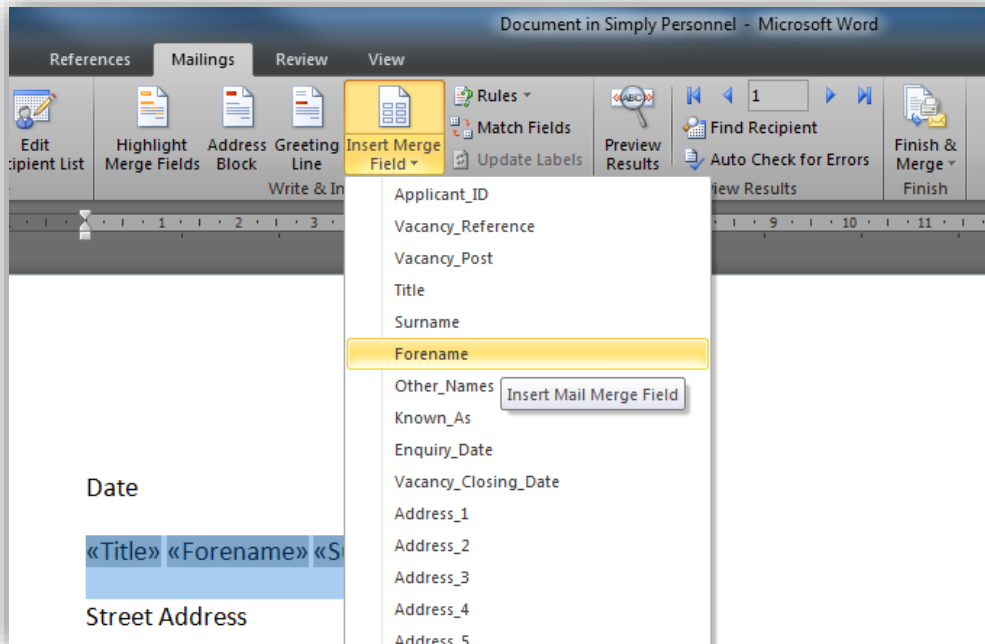
Create from File

This gives the user the option to select a previously created template to upload this into Simply Personnel.
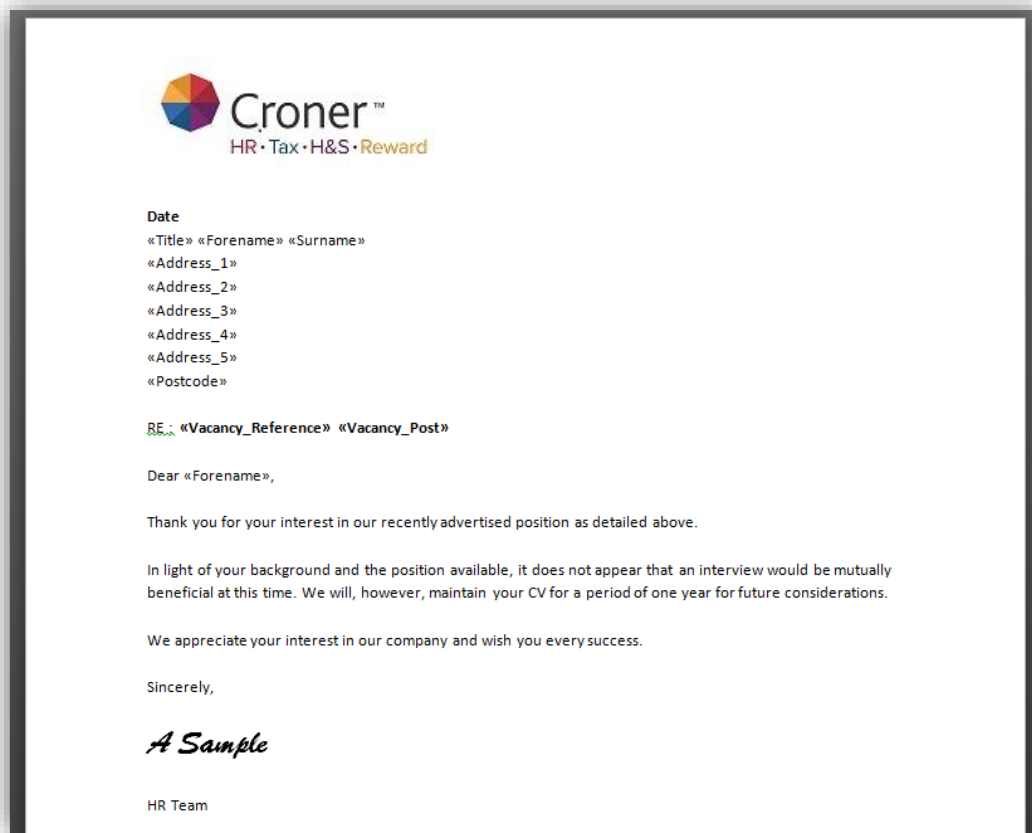
When creating a new document template, create the basic letter as shown in the example below
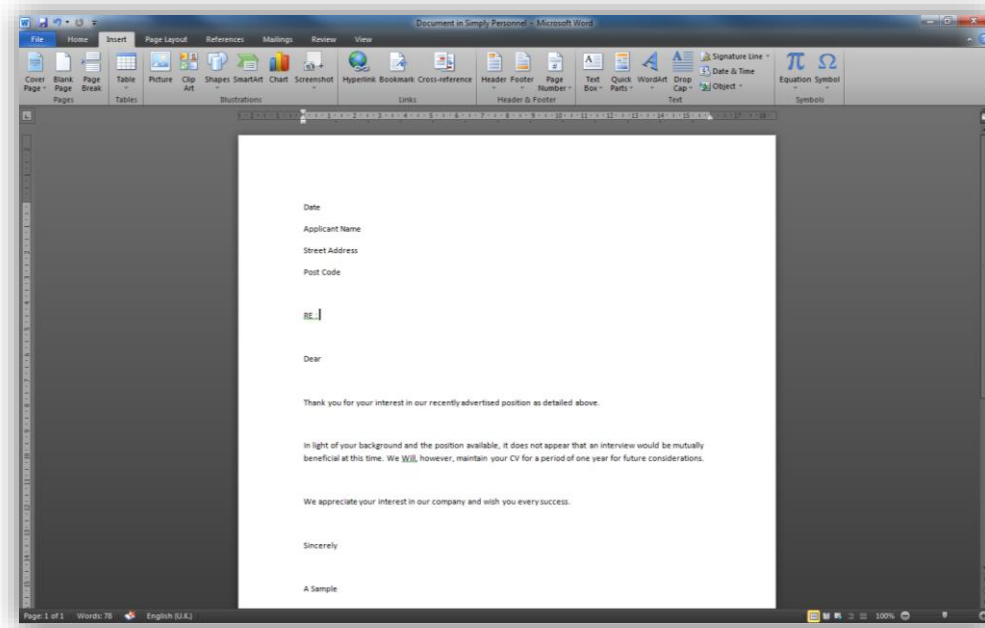
The user can now add mail merge fields from Simply Personnel to populate the template with the Applicant and Vacancy details.
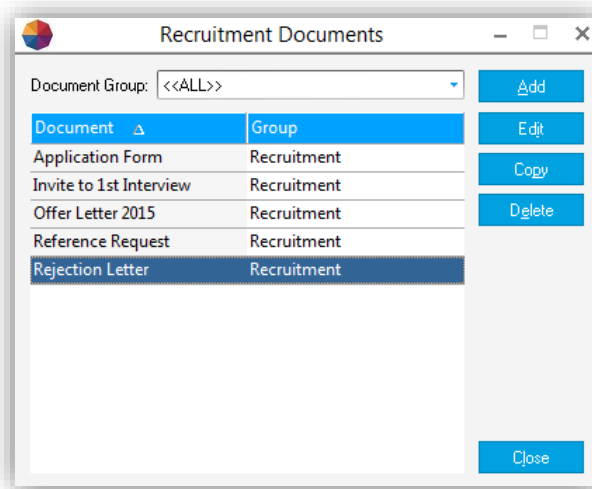
Complete the rest of the letter template by adding the appropriate mail merge fields, header, signature and any other formats if applicable.
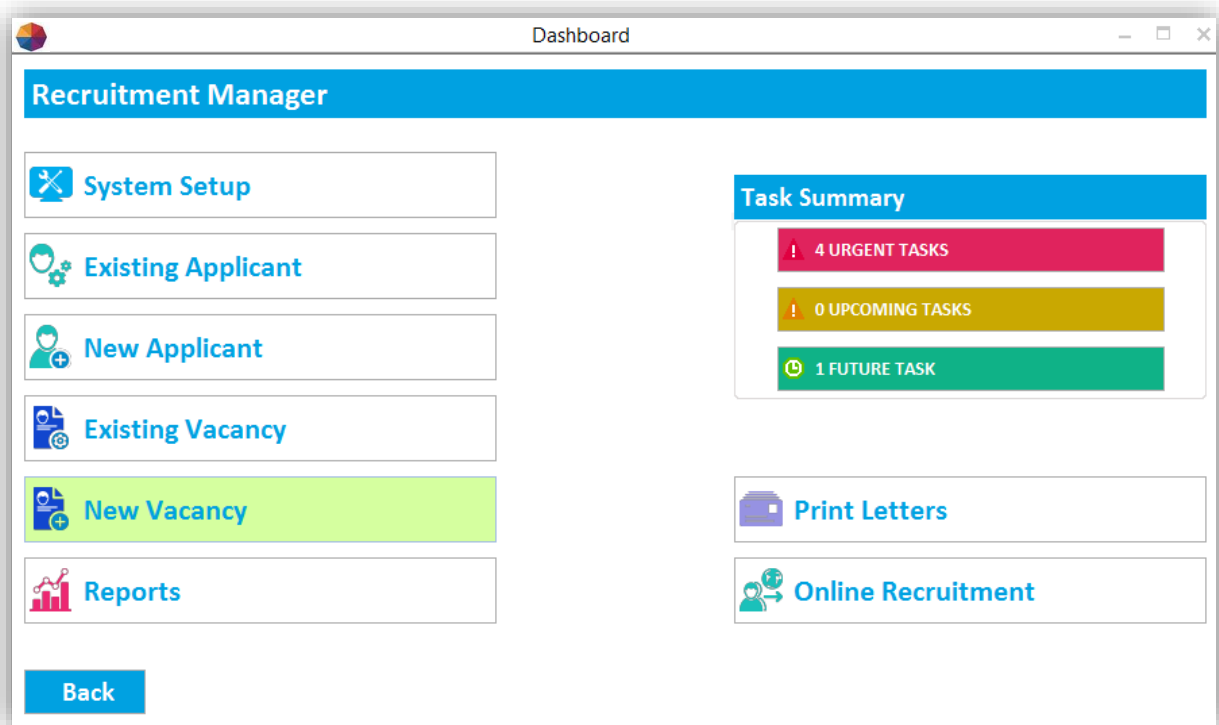

All text formats, images as done above will be saved in Simply Personnel.

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

Creating a New Vacancy

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

This will open up the following window:

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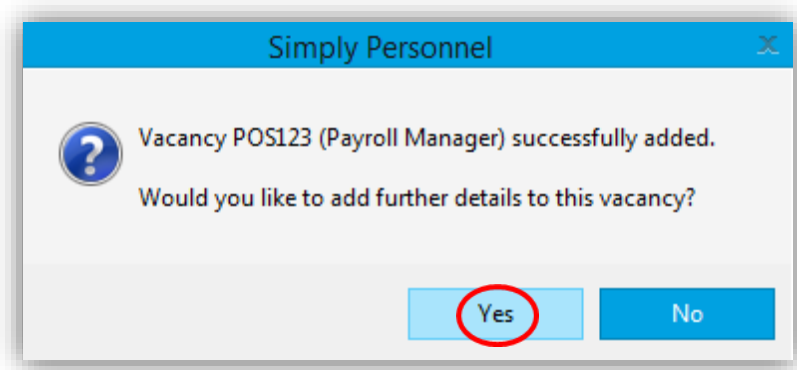
If the user selects YES they will be taken through to the Vacancy maintenance window.

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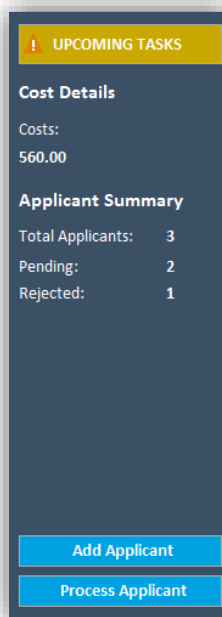
The Task Summary will identify any upcoming/current and out of date tasks in regards to the opened record.

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

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.

Print / Export	The user is able to Print / Export this data to an external application should this data be required for business purposes.
Email	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.
Narrative...	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

Main

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

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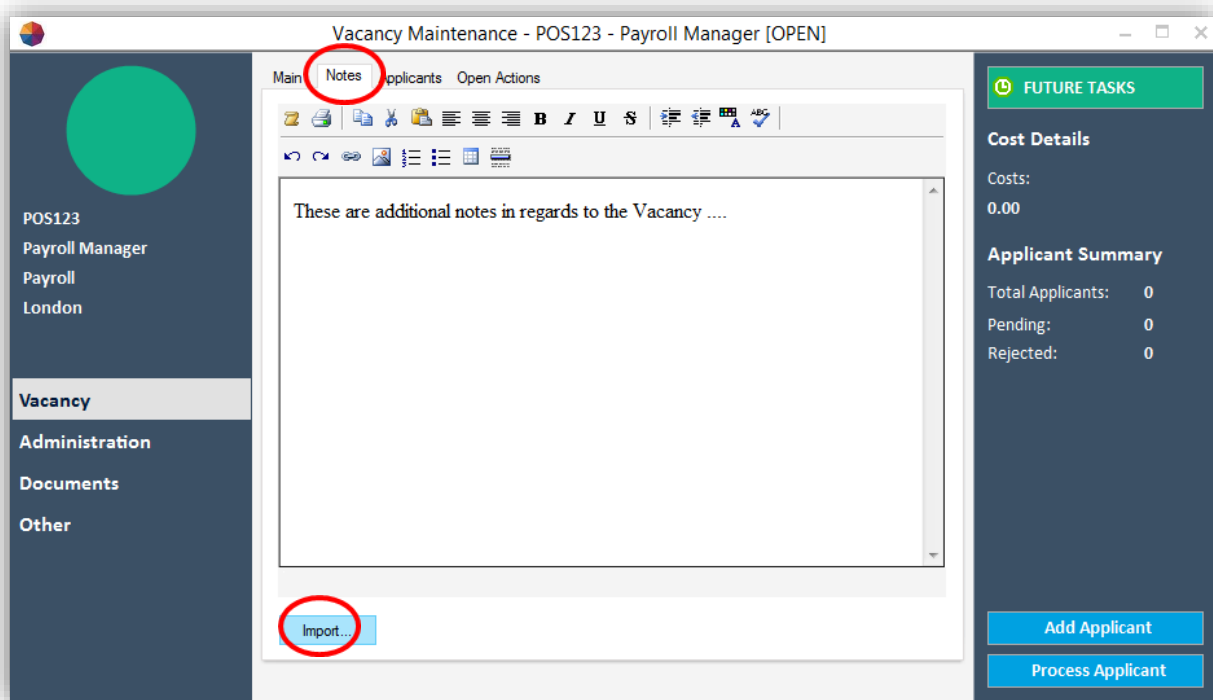
The notes section allows the user to input any details in regards to the Vacancy.

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:
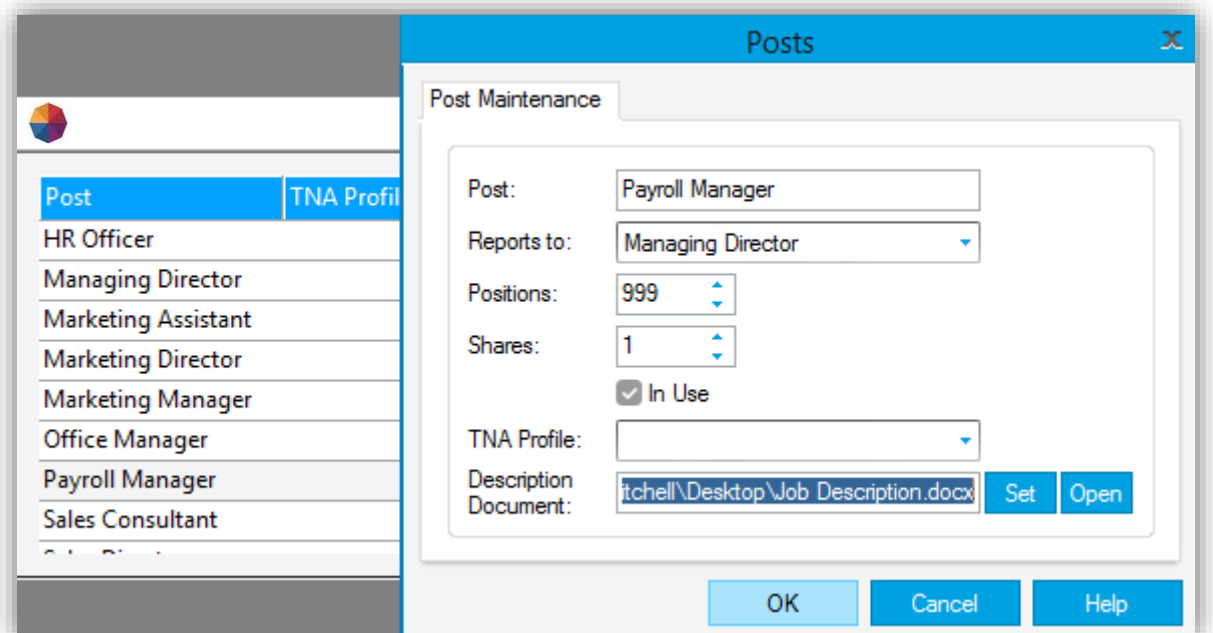
Applicants

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 **ADD** allows the user to create a new Applicant for this Vacancy. Please go to the 'Creating a New Applicant' section for more details.

<u>Open Actions</u>

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 1st 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.
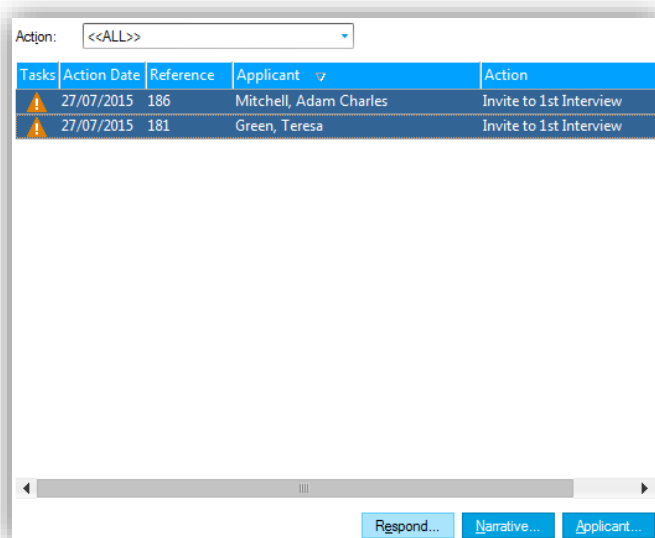
Select multiple Applicants and click 'Respond'
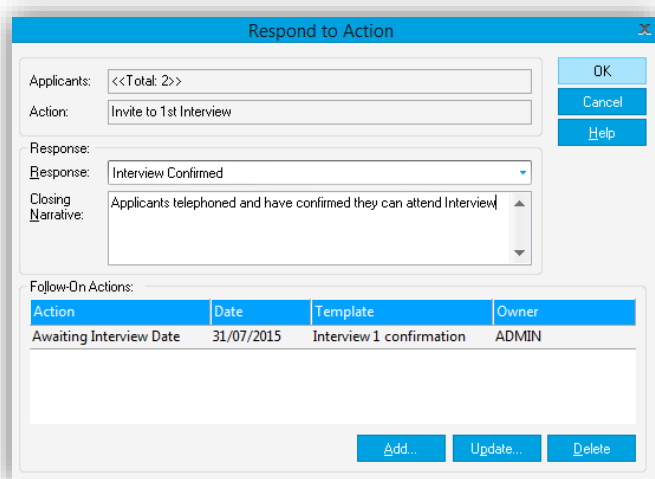
Change the Response field and select the approripate response in relation to the action.
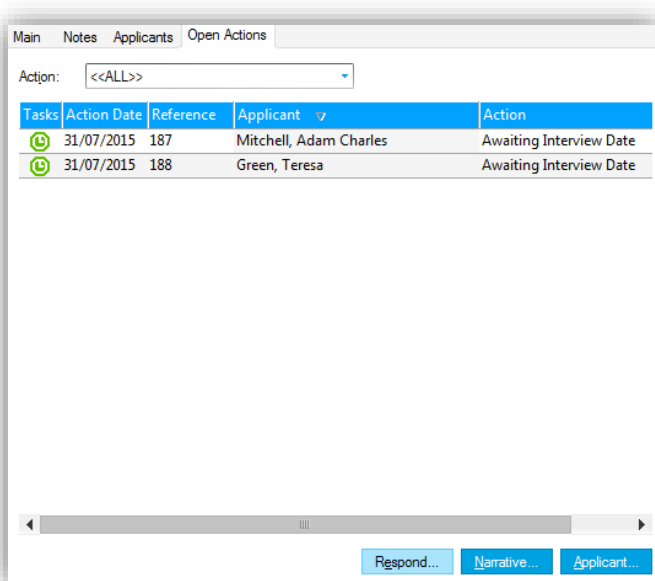
Return to the Vacancy Maintenance window and notice how the Applicants Action has now been moved along the Recruitment Flow.

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

Administration

Advertising

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)

Costs

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

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

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
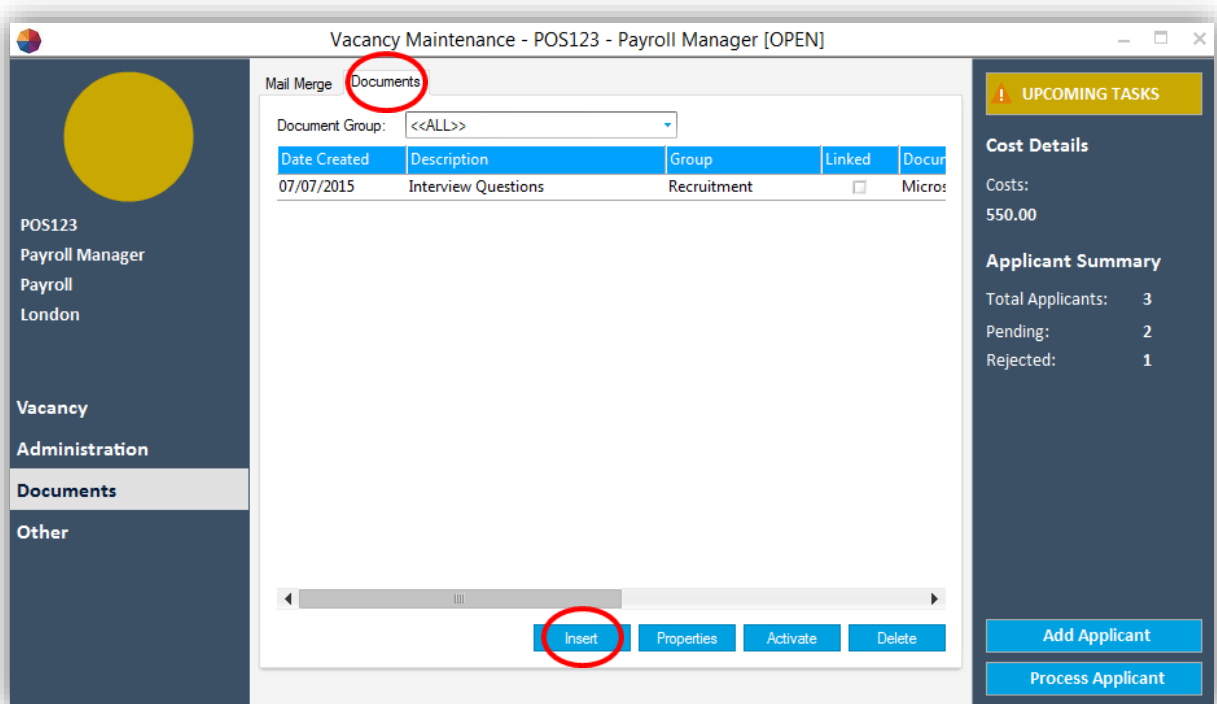
Documents in relation to the Vacancy can be stored on the Documents tab. To load a document, the user clicks **INSERT**
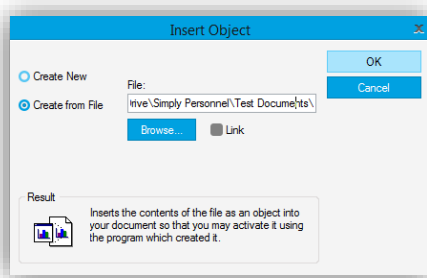
The pop-up windows allows the user to create a document from scratch, or browse to a file location to locate a previously created file.

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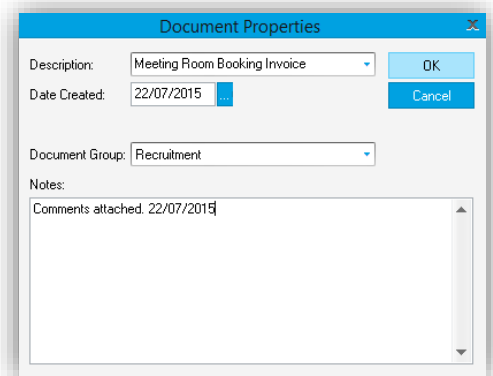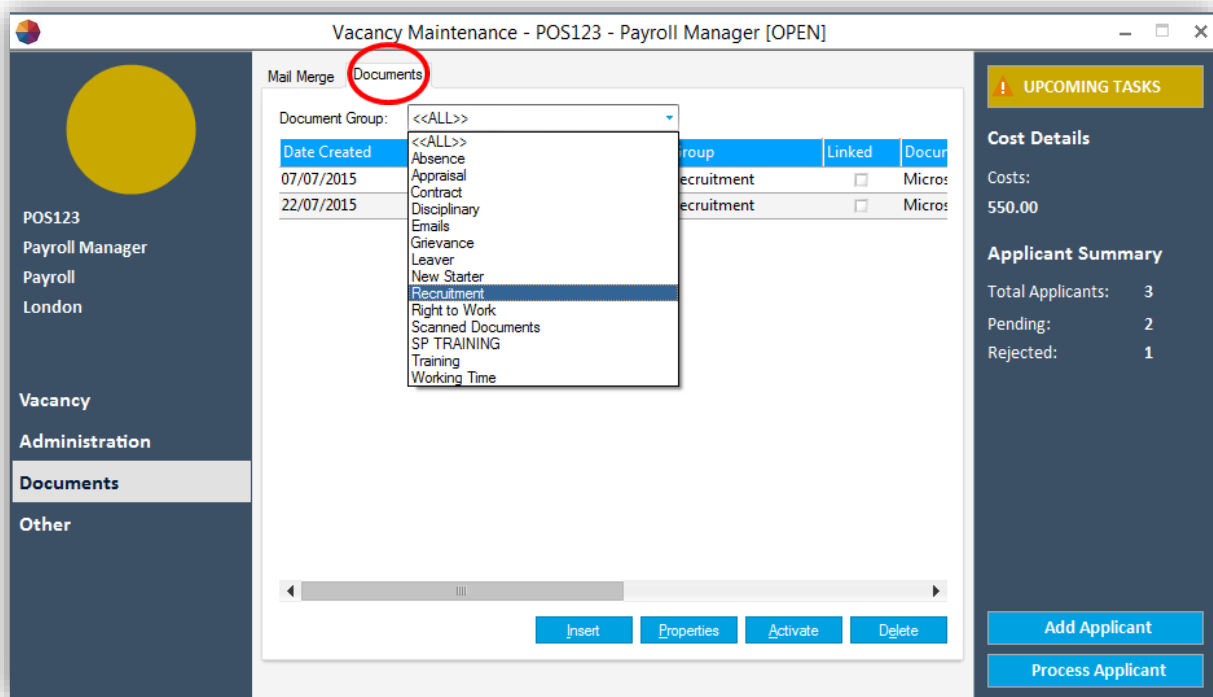
Multiple documents can be stored and filtered through the appropriate group from the top drop down box for quicker navigation.

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.

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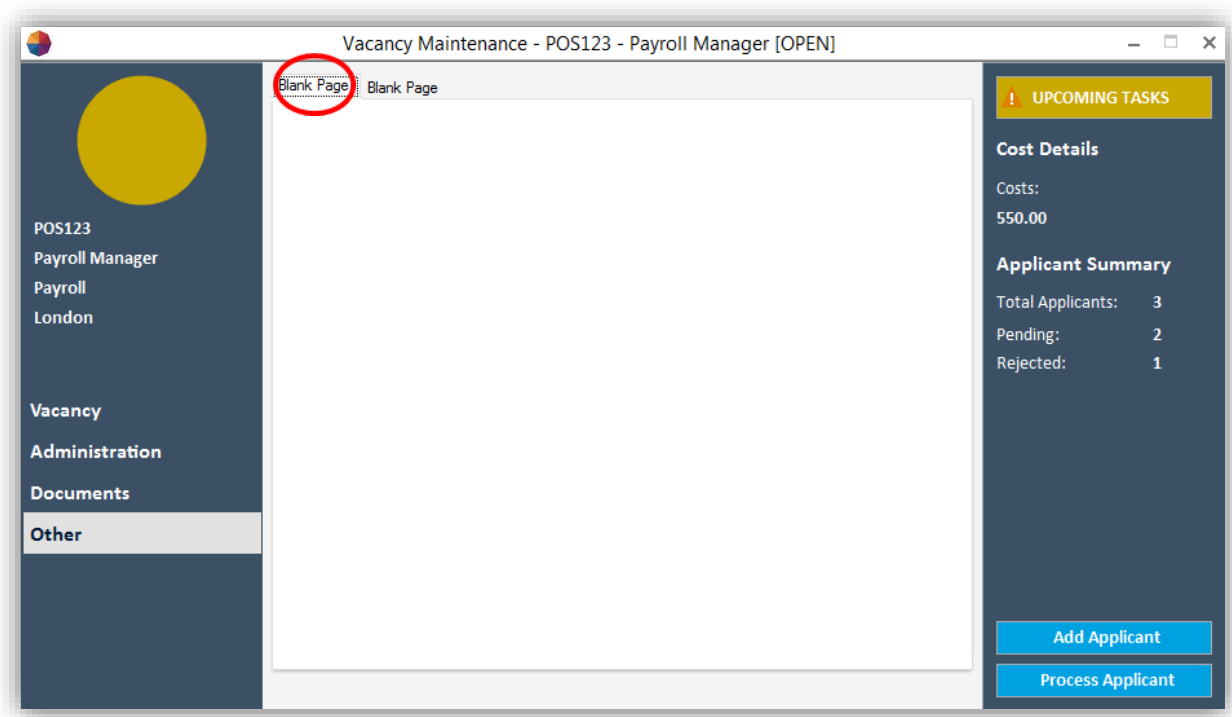
Simply Personnel has a Screen Designer feature that will allow the user to create a bespoke page to input data on to a record which cannot be recorded on the pre-defined fields.

Please see the Screen Designer Guide for more details.
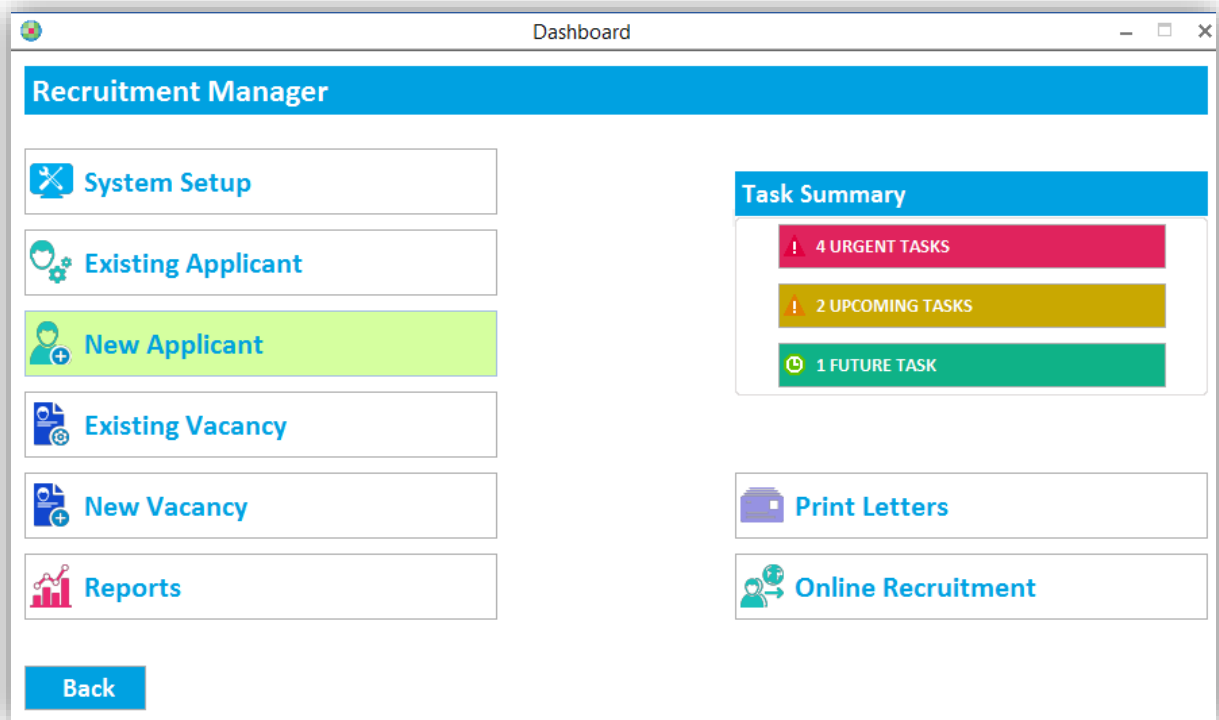
Existing Vacancy
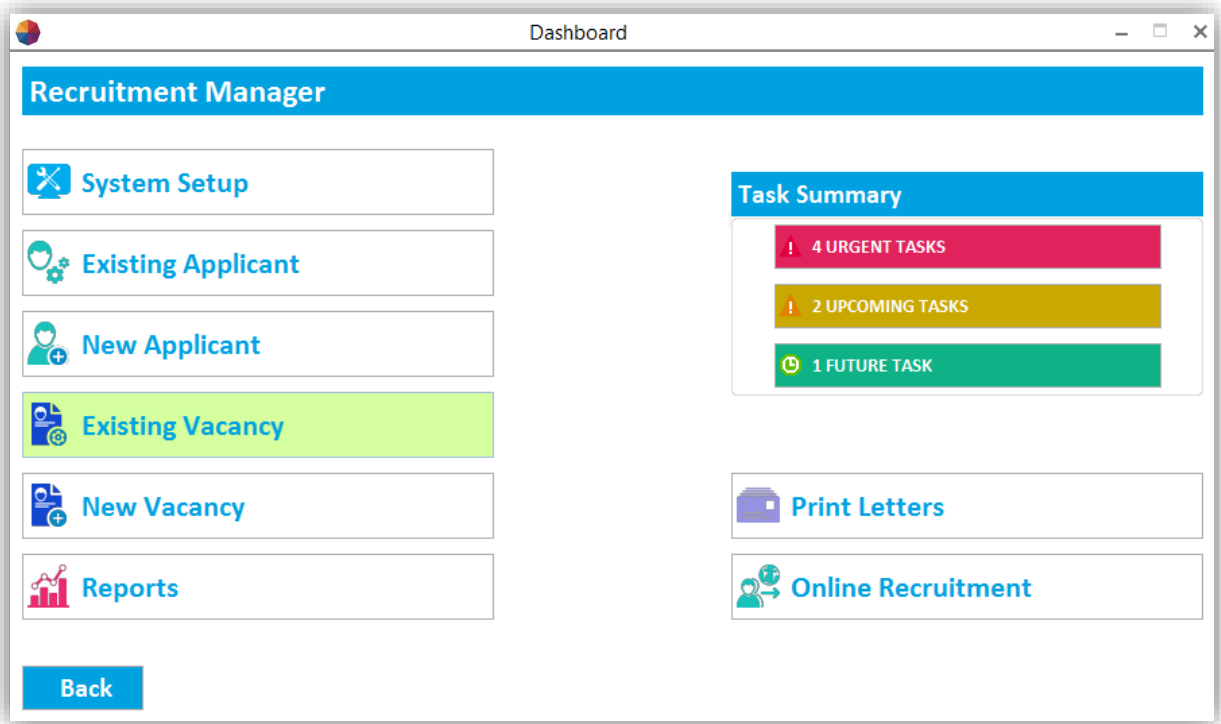
Existing Vacancy opens a search window allowing the user to browse previous, current and future Vacancies created on Simply Personnel and filter out:
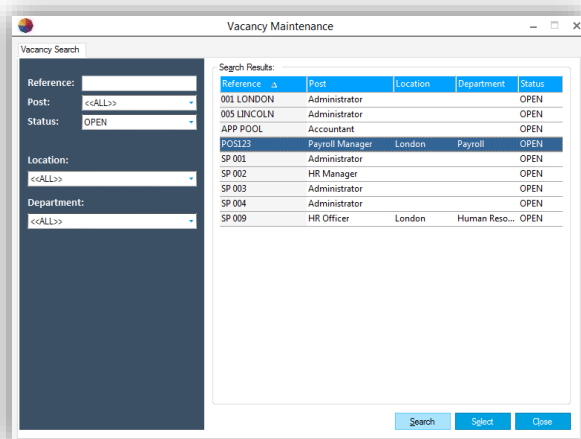
- A specific reference number/code
- Different Posts
- Open/Closed/Suspended Status
- Locations and/or Departments

Creating a New Applicant

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:

Details of the Applicant will be populated as per the example opposite.

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.

Click **NEXT**

Add the Applicants contact details.

Simply Personnel will use these address fields to populate document templates and send emails to any email address stored in these fields.

Click **NEXT**

OPTIONAL : If required to do so, the User can record an Applicants date of birth, marital status, nationality, ethnic origin and if they have been registered disabled.

Simply Personnel also allows the storage of photos against the Applicants record.

This tab does NOT have to be populated, leave the fields blank then:

Click **NEXT**

On the final screen:

Select the first Action Code as per Recruitment Flow and select an owner (if required).

Browse to locate the CV stored on the local / network drive.

Input CV details, name, date, group etc…

Add notes as required.

Click **FINISH**

Existing Applicant
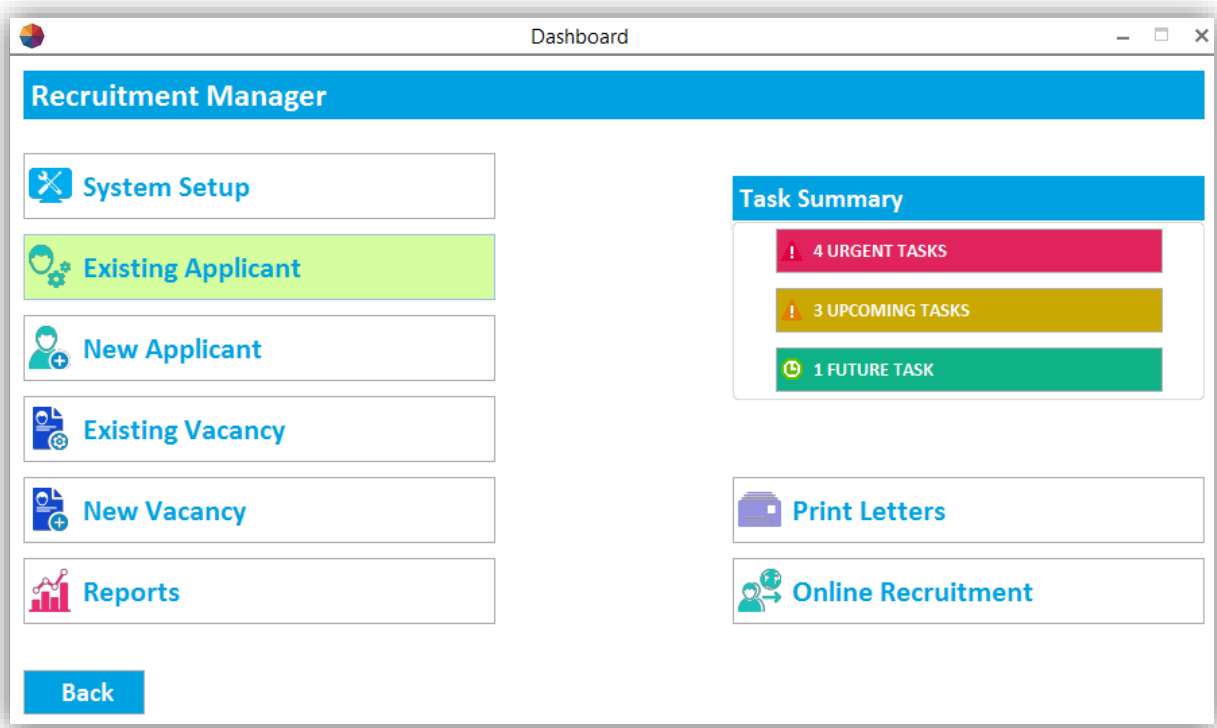
After loading Applicants on to Simply Personnel, the user can access these by clicking on Existing Applicant as highlighted above and search for:
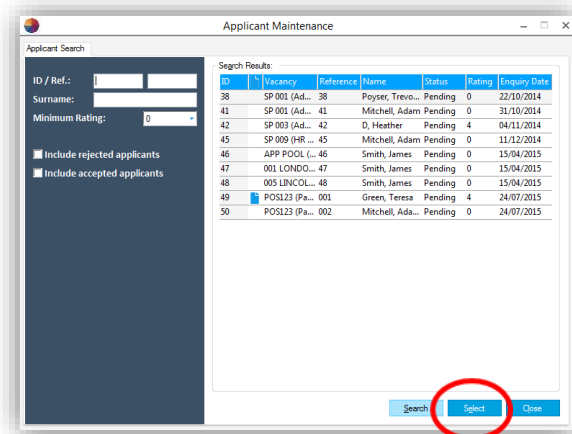
- An ID/Ref Number
- Surname
- Minimum CV Ratings
- Show Accepted/Rejected Applicants

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.

Hints and Tips   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.
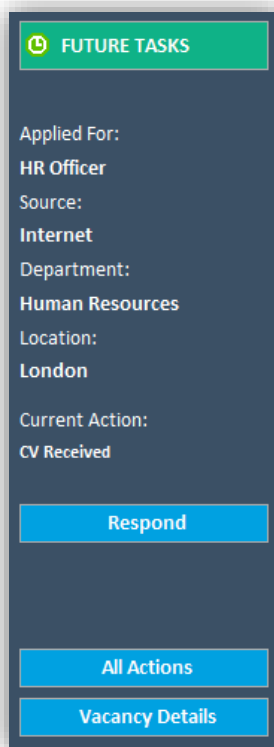
Also displayed:

Post Applicant has applied for

The application source

Where the post is based (Location/Department)

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.

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 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.

Print / **Export**	The user is able to Print / Export this data to an external application should this data be required for business purposes.
Email	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.
Narrative...	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

Main

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

Address

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.

Personal

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

Applicant

Events 1-2 & 3-4

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

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.

Actions

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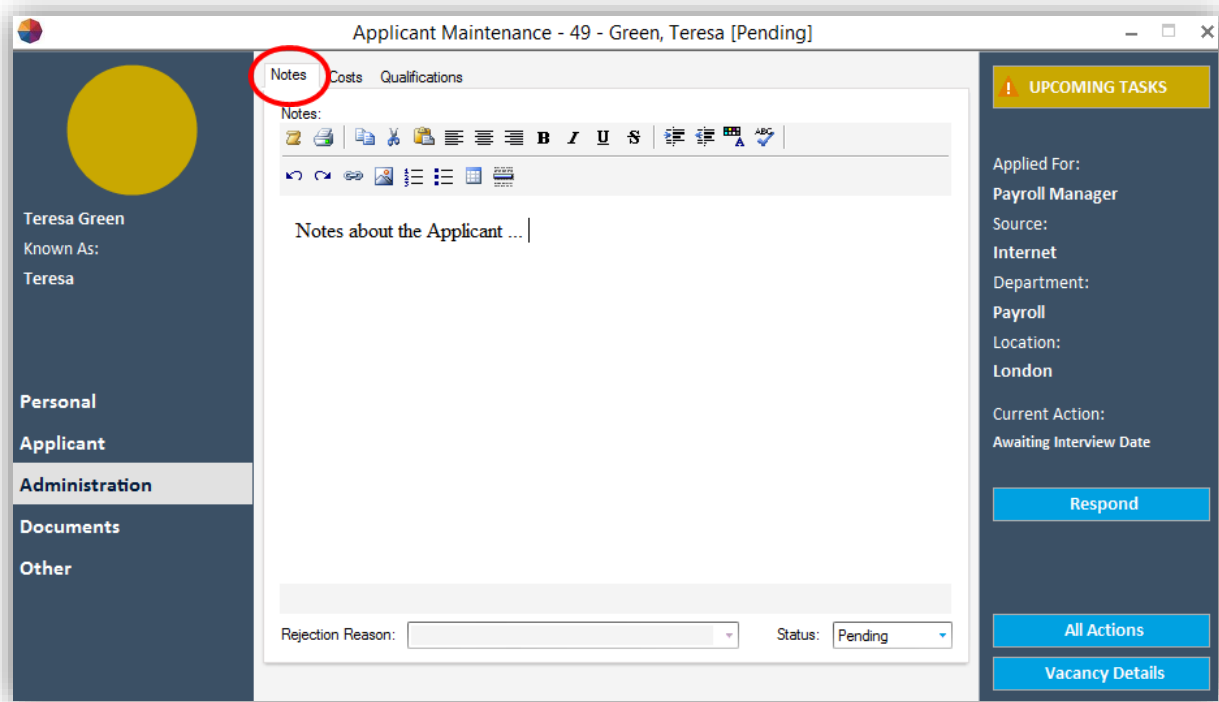
The Action Code Reponse process is explained in the Vacancy Maintenance section under 'Open Actions'.

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

Notes

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.

Costs

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

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 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

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**.

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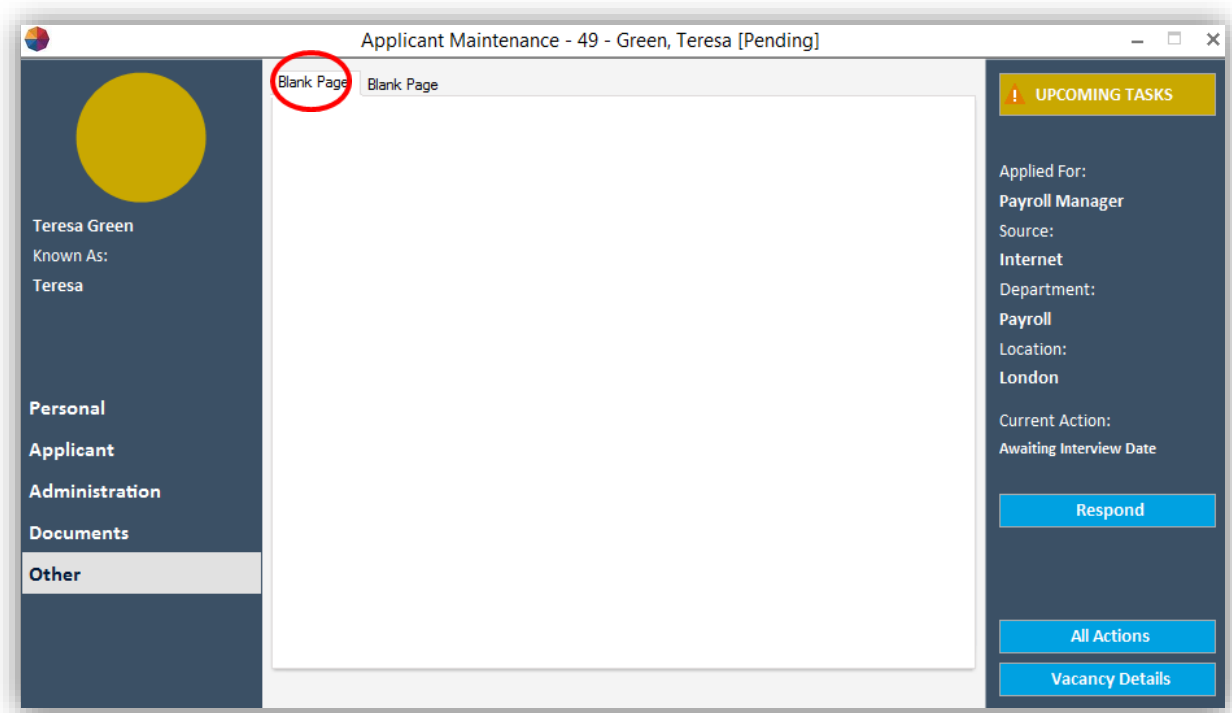
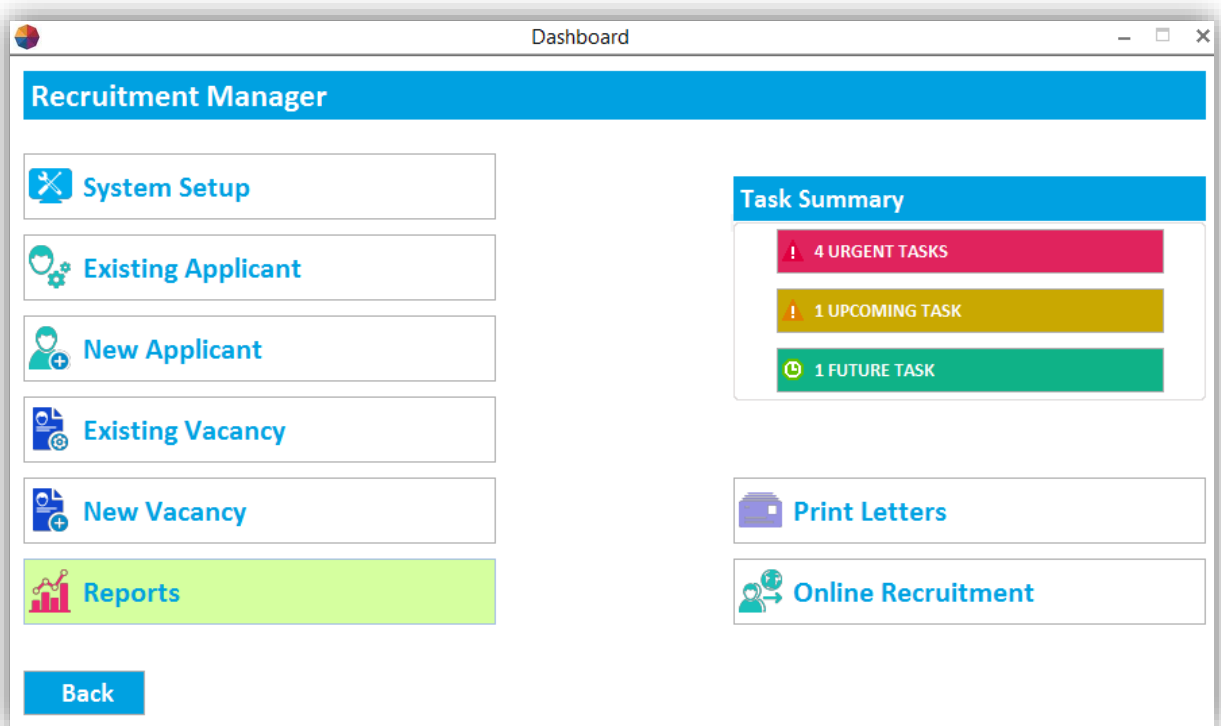Simply Personnel has a Screen Designer feature that will allow the user to create a bespoke page to input data on to a record which cannot be recorded on the pre-defined fields.
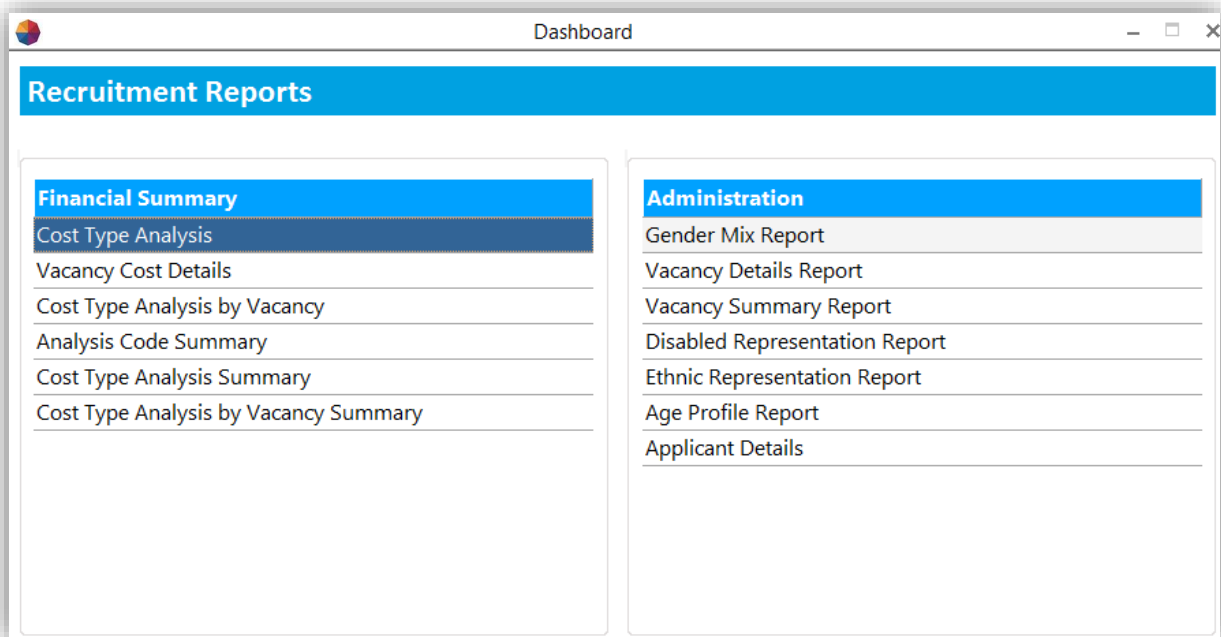
Please see the Screen Designer Guide for more details.

Reports

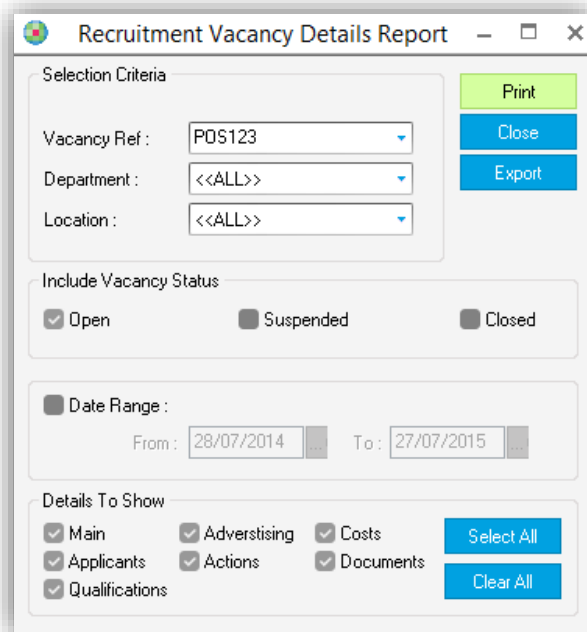This section of the software allows users to report on Vacancies, and the Applicants associated with a Vacancy etc. There are cost summary reports and budget analysis reports.

Pre-Defined Reports

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 Simply HR Software Company Ltd
Recruitment Vacancy Details Report

Vacancy Ref : POS123
Department : <<ALL>>
Location : <<ALL>>
Open
Vacancy Reference : POS123

Main

Vacancy Reference :	POS123	Department :	Payroll
Post :	Payroll Manager	Location :	London
Status :	OPEN		
Creation Date :	24/07/2015	Salary Band :	Band 2
Closing Date :	31/08/2015	Specific Salary :	£28,000
Target Date :	N/A	Employment Type :	Full Time

Advertising

Date	Description	Provider	Source
24/07/2015	Advertisment	Yorkshire Post Newspaper	Newspaper
24/07/2015	Website	Howard Jackson Agency	Internet

Costs

Date	Cost Type	Description	Cost
24/07/2015	Interview Room Hire	Outsourced	300.00
24/07/2015	Magazine Advertisement	Colour Advert	250.00
			550.00

Applicants

Applicant Reference	Applicant Name	Rejected	Reason for Rejection

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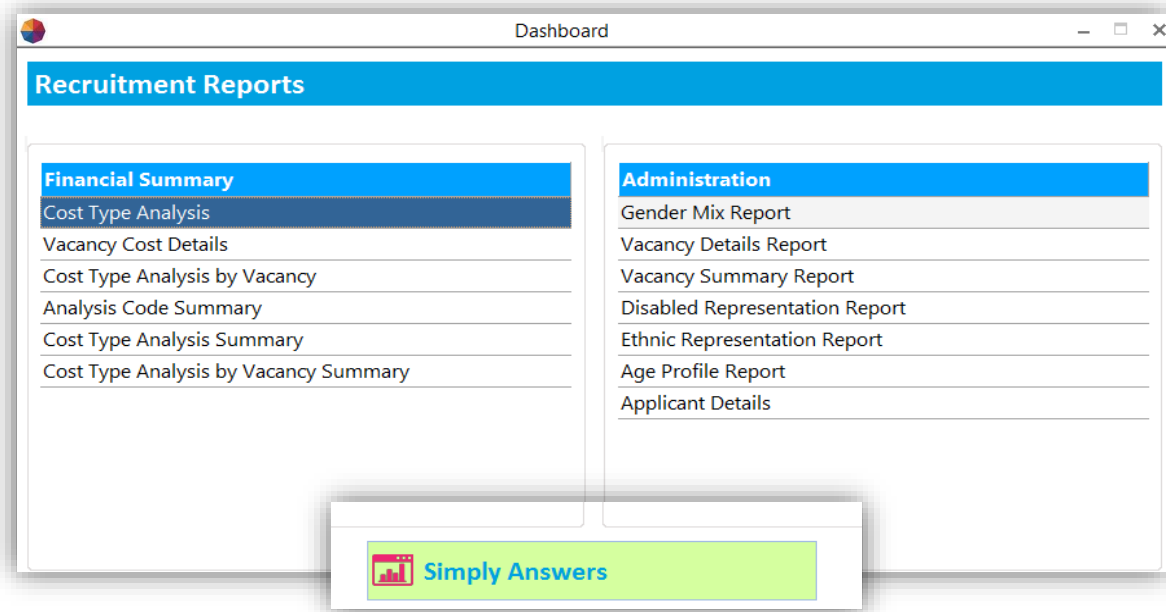
As above at the bottom of the pre-defined reports list, select Simply Answers. Users can define what fields to report on.
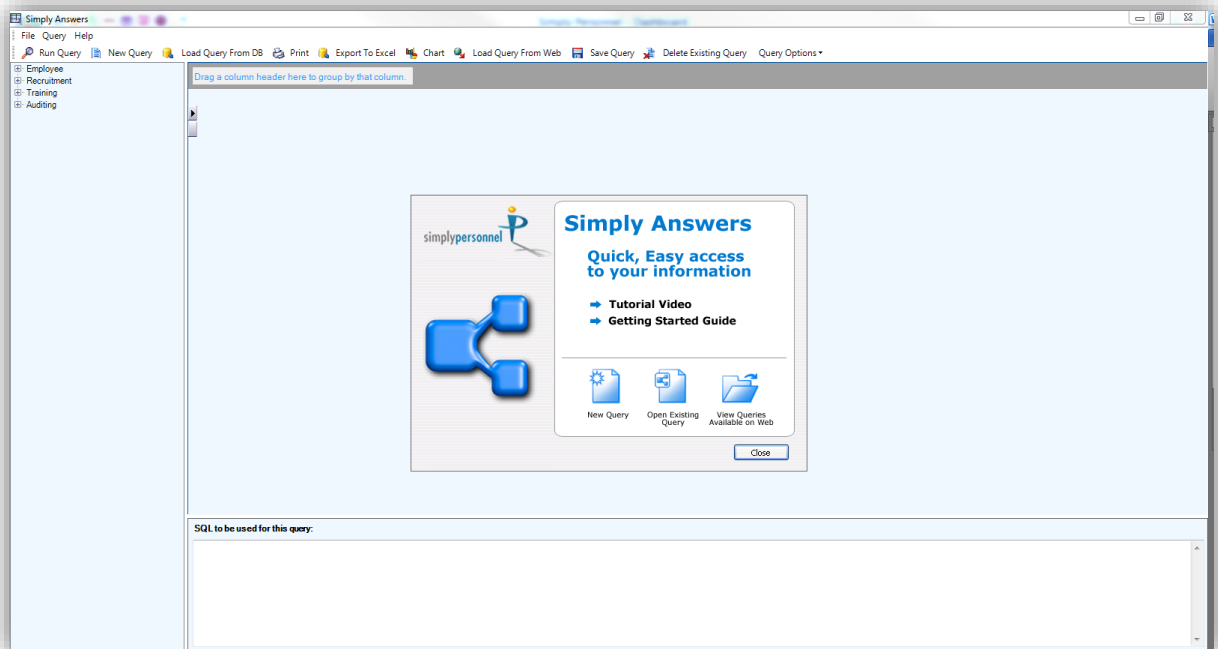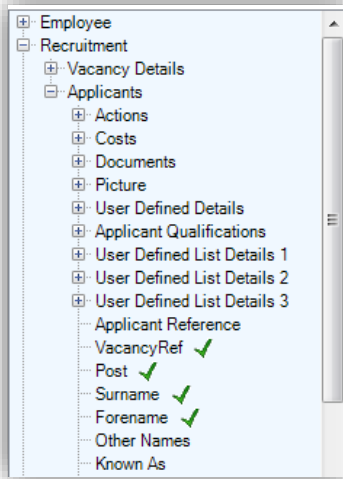

Simply Answers opens up in a separate window:

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:

Data can be filtered out by clicking the 🔽 filter icon.

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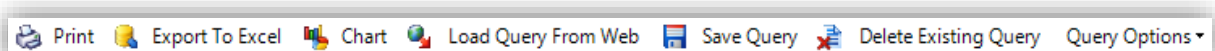

To export the report to Excel, select export to excel. To create charts, ensure the query has firstly been run, and then select Chart. Users can save the report template using the Save query function.

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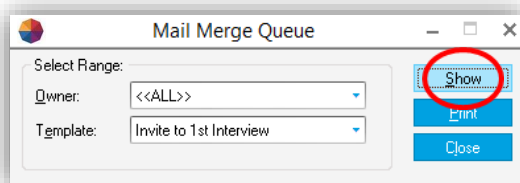

If running a report to show Leavers, update Query Options to show Leavers otherwise Simply Answers defaults to only show Live Employees / Applicants.
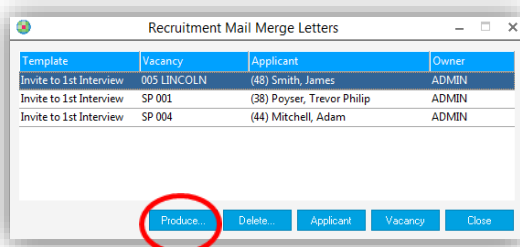
Print Letters
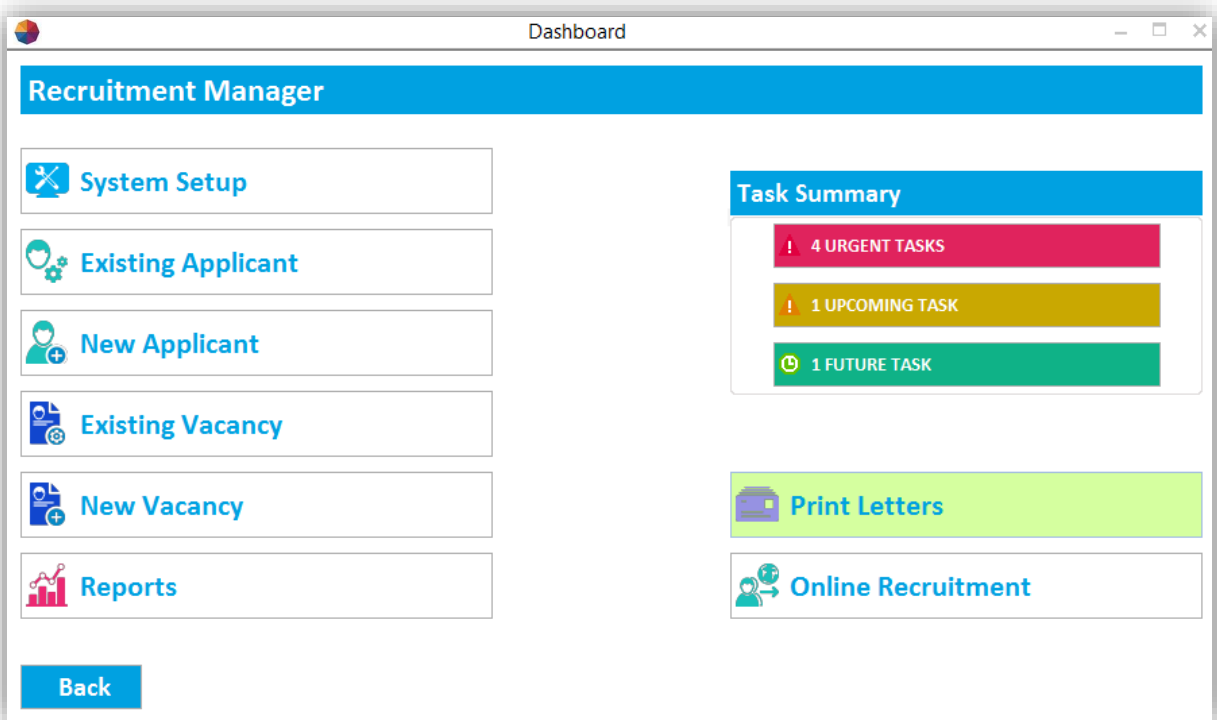
Print Letters allows the user to produce any documents for the Applicants loaded against any Vacancy without having to go into the individual records.

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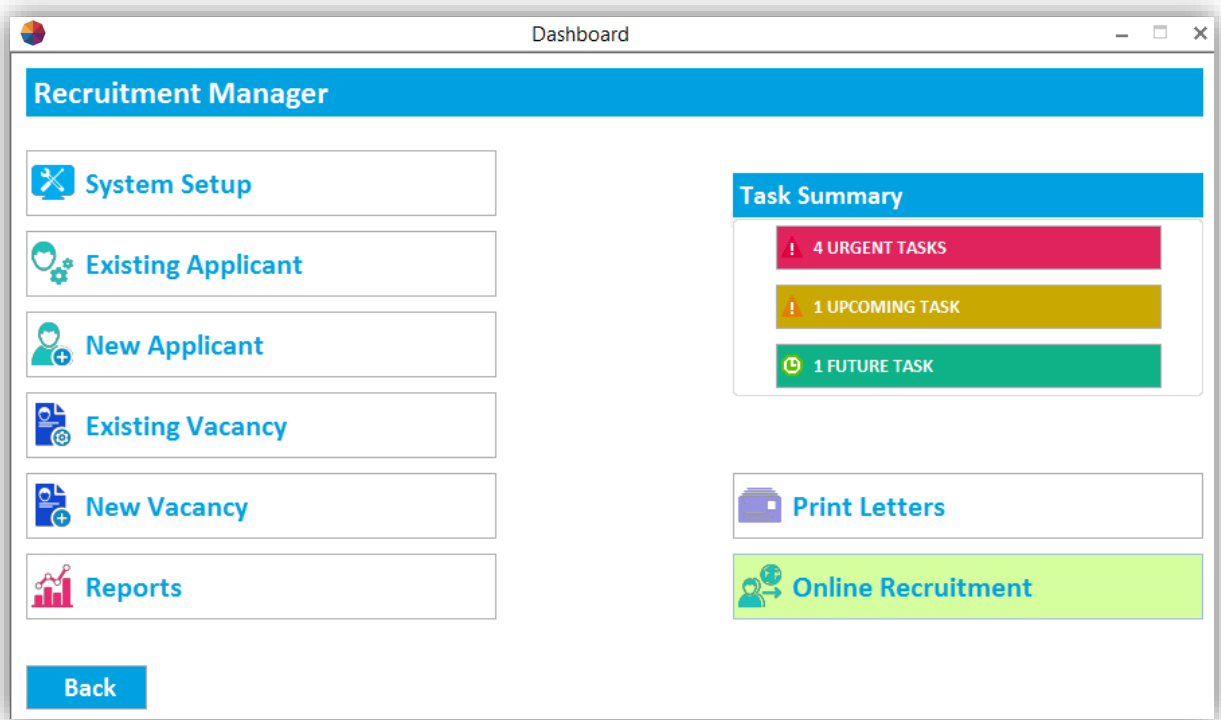
Click **SHOW**

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

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.

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

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

My Notes: