Georgia®

TEAM GEORGIA CAREERS

A world of opportunity.

Recruiter's Resource Guide

First Edition

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Contents

Section One – Recruiting

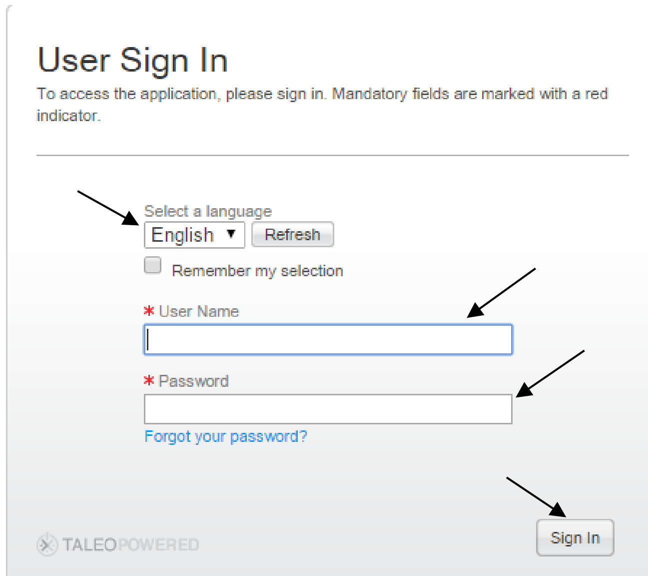
Accessing Team Georgia Careers

Log into the Team Georgia Careers:

http://team.georgia.gov/careers

Prerequisite:

You must have received a user name and password from your system administrator.



Steps:

1. Select the language in which you want to use the application.
2. Enter your user name
3. Enter your password.
4. Click Sign In.

My Setup Preferences

How to set preferences and adding a Default Hiring Manager and a Default Recruiter name.
Steps: 1. In the top right-hand corner of the screen, click on **Resources** 2. Click on **My Setup** 3. Click on the **Preferences** tab 4. Click the **Edit** button 5. Scroll to section 4 - **Requisitions** and locate the **Default Hiring Manager** field 6. Type your Hiring Manager name into the field and select it when it appears 7. Locate the **Default Recruiter** field (next to the Default Hiring Manager Field) 8. Type your Recruiter name into the field and select it when it appears 9. Click the **Save and Close** button 10. Click on the **Recruiting link** from the core navigation bar to return to the Recruiting Center
Checkpoint: ✓ You were able to access My Setup ✓ You were able to add a Default Hiring Manager and Default Recruiter

Creating a Requisition

How to create a requisition.

Steps:

1. Click on the **Create Requisition** button in the Job Openings channel
2. Click on the **Selector** button in the ***Requisition Template field*** to access and select the applicable title from the list of available templates, or type the Requisition title into the Requisition Template field and wait for the system to autosuggest a match
3. Select the Requisition Template when it appears
4. Click on the **Selector** button in the ***Department field*** to access and select your agency code and name from the list or type in your agency's name or agency's department ID number in the ***Department field*** and wait for the system to autosuggest a match
5. Click the **Next** button
6. Click the Selector button to access and select the primary location for the requisition or type the Primary Location and select it when it appears
7. Click the **Create** button
8. The requisition title in the **Requisition field** is already populated; Type the working title in the **Working Title Field** will show on the job announcement.
9. Enter the number of openings for this requisition, (***Unlimited*** may be chosen for continuous or ongoing recruitment)
10. Under Justification click on the dropdown and choose the relevant choice for the requisition
11. In the identification Section, click the selector button next to the **Position Number field** and search for the position or start typing the position number and wait for the autosuggest and click select
12. In the Identification Section, click the **Selector** button next to the **Agency Logo field** click on select
13. Scroll to **Profile** and click on the *Employee Status*, *Schedule*, *Job Level*, *Shift*, *Education Level, Travel, Type of Examination*, and the *Target Start Date*, and choose the relevant choices for the requisition
14. Scroll to **Compensation**, click on Pay Basis and choose the relevant choice for the requisition. Enter the salary amount in the **Advertised Salary Field** only if it should be displayed on the announcement.

15. Under **User Group,** Note: The agency group is already prepopulated

16. Under **Structure, Note:** The fields are already prepopulated**, If there are any changes to be made, Click the Edit Button to make the changes.**

17. Scroll to the **Owners** section, your name as the recruiter is already pre-populated as the Recruiter. Click on the selector button to access the Hiring Manager's name or start typing the name in the field and let and wait for the autosuggest and click select.

    Enter the appropriate name in the Recruiter Coordinator field and select it when it appears

    To add a Collaborator to the requisition, Click on the modify button, in the Quick Filter on the left hand side of the screen type the collaborator's name and click the refresh button, then click the Done button.

18. Scroll to **Section 2 & 3** and Review the **External** and the **Internal Description** of the requisition. A recruiter may make the relevant changes.

19. Scroll to **Section 4 Prescreening** or Click the drop down arrow on the Requisition tab and click on the sections for quick access to a particular section.

    - ✓ Review the 4 Disqualification questions added automatically to your requisition.
    - ✓ To add a question, under the **Questions heading** click Add
    - ✓ In the Quick Filters area on the left hand side enter a code (**INSERT Job Code**) into the *Code field* and then click the **Refresh** button
    - ✓ Click the **Select** button to the right of the question
    - ✓ Click the **Done** button
    - ✓ Click on the dropdown under the **Required/Asset** and choose whether the answer is a preferred or entry qualification
    - ✓ To remove a question you have added, scroll up to the top of the Questions section and click Remove
    - ✓ If multiple questions are added, see the option to change the order of the questions. (For example: scroll up to the top of the Questions section and click the drop down 1 next to the first question, change it to 2 and click Reorder
    - ✓ Verify the questions are reordered to your specifications

20. Click **Save** at the top of the Requisition form (not Save and Close).

21. Scroll until you see the **Competencies** section
    - ✓ To add a Competency, click the Add button
    - ✓ Click the **Select** button to the right of a State of Georgia Competency
    - ✓ The Competency should appear in the top portion of the window.
    - ✓ Click the **Done** button
    - ✓ In the **Required/Asset** columns for the Competency you can select which value you prefer with the drop down

- ✓ In the **Min. Proficiency and Min. Experience** you will see a default value listed. If you wish to change the default value, you can use the drop down

22. Click the **Save and Close** button

23. Click on the **More Actions** and select Request Approval

24. Locate your **Approver** using the name filter on the left hand side by typing in the approver's name and click the refresh button
click the **Select** button to the right of the Approver's name, the approver's details will appear in the top portion of the screen.

25. A comment is **(Required)** in the comment field

26. Click the **Done** button

27. The requisition is in **Pending To Be Approved status**

Checkpoint:

- ✓ The Status of your requisition is Open and the Status Details is Pending Approval

Approving a Requisition

The next steps will show you how an approver will approve a requisition.
Step-by-Step: 1. An email will appear in the approver's inbox from Human Resource **Requisition Approval Request**" 2. Open the email and click the **Respond** link 3. Click on the "**Requisition Details**" link to review, click the red X when finished 4. "**I approve this requisition**" is already prepopulated in the field 5. Click Done 6. If the approver choose to reject the requisition: Click on the dropdown and choose **"I reject this requisition"**. Comments are required if the approval is rejected. 7. Click **Done**. 8. Close the internet browser window

Completing a Requisition

How to complete a Requisition

Steps:

1. Log into Team Georgia Careers

2. Click on **Recruiting**

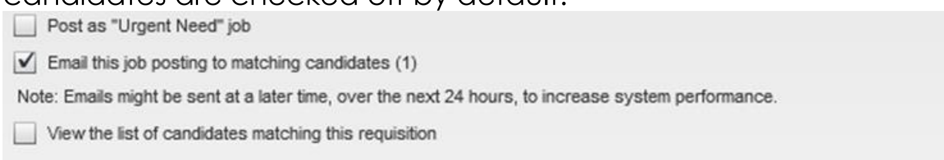
3. Verify that the information on the requisition is correct and ready for posting

Click on the **Edit** button if there are any relevant changes needs to be made then click the **Save and Close** button.

Posting a Requisition

How to post your Requisition to the External, Internal and Job Boards.

Steps:

1. Click on the **Posting and Sourcing** tab
2. Under the **Career Sections** heading click the **Modify** button
3. In the Careers Section, **External and Internal Career Section is pre-populated.** The start date is also prepopulated with **"Today"**; this can be changed by clicking on the calendar if the start date for the requisition will be a different day. The default **End Date** is set for **30 Days Later.** This may be changed to meet your business need.
4. Check the appropriate boxes that may apply. Email this job posting to matching candidates are checked off by default.


5. Confirm the **posting status column** boxes are checked for both the External and the Internal Careers Section if applicable.
6. Click the **Done** button
7. Scroll until you see the **Job Boards (eQuest)** section heading
8. If posting to outside job boards supported by eQuest, click the **Post** button and complete steps 9 through 13.
9. Click on the appropriate job board button
10. Scroll to the bottom of the page and click the **Next** button
11. Scroll to the bottom of the page and click the **Next** button
12. Review your posting and click the **Submit** button at the bottom of the page
13. Confirm the appropriate Job Board item you selected is listed in the Job Boards list and the status is **Posted**
14. If using an **approved** staffing agent, Scroll until you see the **Staffing Agents** section heading
15. Click the **Modify** button
16. Locate the appropriate person in the list of available agents and click the **Select** button

to the right of the Staffing Agent. The person's name will appear in the top portion of the window.

17. Click the **Post** button to the right of the agent's name
18. Click the **Done** button
19. Confirm the agent's name is listed in the Staffing Agents list with a status of **Posted**
20. Click the **Sign Out** link in the top right hand corner

Checkpoint:

- ✓ You were able to post to the External and Internal Career Sections, Career Builder and the Agent, Test staffing agent

Filtering a Requisition List

How to filter the Requisition List to answer some questions.
Steps: 1. Click on **Requisitions** in the core navigation bar to access the **Requisition List** 2. Under the **Show Requisitions For** drop down and make a selection 3. Click the **Advanced Filters** button in the bottom left hand corner 4. Choose any of the various options for searching 5. Type in the search criteria and click the **Add** button 6. Click the **Done** button 7. If you wish to remove the filter, click the **X** next to the Keyword in the top portion of the screen 8. Change the **Show Requisitions For** drop down back to **I Own**

Conducting a Quick and Specific Search

You will access a candidate using Quick and Specific Search

Steps:

1. Click on the applicable link from the Team Georgia Careers section and log-in to the system

2. Click on **Recruiting**

3. Locate the **Quick Search** field in the top right hand corner of the screen. Be sure that the icon to the left of the field is set to Candidates: 

4. Type the **Candidate's Name** into the **Quick Search** field

5. Click on the **Search** icon beside the **Quick Search** field: 

6. The **Candidate's name** should appear in the results list

7. Click on the **Quick Search** icon to the left of the **Quick Search** field: , and in the drop down select **Specific Candidate**

8. In the **First Name and Last Name** field type the Candidate's first and last name in the applicable fields

9. Click the **Search** button

10. See the **Candidate** with the **First and Last Name** appearing in the results list

11. Reset the **Quick Search** field in the top right hand corner by clicking on the **X** in the field

Conducting an Advanced Search

Introduction: You will see an example of how to conduct an Advanced Search

Steps:

1. Click on the **Advanced Search** link in the top right hand corner of the screen and review the available search fields

2. Click on the 

button at the top of the Search Form to customize the search further

3. Scroll through the Available fields in the bottom section of the screen, and click the **Select** button beside **Schedule**

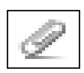
4. Click the **Done** button

5. At the top of the page, type in a key word into the **Keywords** field

6. Scroll to the bottom of the page and select **Full-Time** in the **Schedule** drop down

7. Click **Search** at the top of the search form to run the Query

8. Candidate(s) should appear in the results list based on the key word entered

9. Click on the Attachment icon  to preview the candidate's attachment

10. In the Attachment's preview pane, scroll until you find the key word highlighted in yellow

11. Click on the  button at the top right hand corner of search results list to return to the Search Query

12. Click the 

button to save the Search Query

13. Enter a name for your Search Query and leave the folder set to **/Personal**

14. Click the **Done** button

Filing Candidate into a Folder and Creating a Self-Assigned Task

How to file a candidate from the Candidate Advanced Search Results into a Folder.
Steps: 1. Click on **Recruiting** in the core navigation bar 2. Click on the **Search Queries** link in the top right hand corner  3. Click the blue title link to access a saved search query 4. Click the  button 5. Add a check in the box to the left of the candidate NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the checkbox to checkmark the candidate 6. Click on the **Folder icon**  at the top of the Candidate List 7. Make sure the **Personal Folder** is highlighted in blue 8. Click the **Done** button 9. Make sure the candidate still has a check mark next to their name. If not, add a check mark to the left of your candidate's name 10. Click the **More Actions** drop down and select **Create Self-Assigned task** NOTE: *STEP **11** is an example of a self-assigned task you can create* 11. Enter **Call Candidate** in the **Name** field, select a **Due Date** of tomorrow and in the **Reminder** drop down select **On Due Date** 12. Click the **Save and Close** button 13. Click the **Sign Out** link in the top right hand corner

Accessing and Creating a Folder

How to access your candidate folders and create a new folder
Steps: 1. Click on the applicable link from the Team Georgia Careers section and log-in to the system 2. Click on the **Candidates** link in the core navigation bar 3. Click on the **Folders** tab, located to the left of the Candidate List and directly above the Quick Filters 4. Candidates that have previously been filed will be shown in the **Personal Folder** 5. Be sure that the **Personal Folder** is highlighted in **blue** 6. Click on the **Manage** drop down located above your personal folder 7. Select **Create** 8. Type in a name for the folder 9. Hit the **Enter** key on your keyboard
Checkpoint: ✓ You should see a folder with the name you have given it as a subfolder under your **Personal** Folder

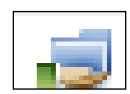
Sharing a Folder

How to share a folder (*See Creating a Folder*)

Steps:

1. Click on the **Name** of your folder and ensure it is highlighted in **blue**
2. Click on the **Manage** drop down above your folder
3. Select **Sharing**
4. Uncheck **Users of the parent folder**
5. Click the drop down and select **Groups and Users selected**
6. Click on **Users tab**
7. Type in the Person's name to be shared into the **Name** field under **Quick Filters** and hit the **Enter** key
8. Click the **refresh** icon  located to the right of the **Name** field
9. Click **Select** next to the Person's name you wish to share
10. Click the **Done** button

Checkpoint:

✓ Your folder will have a hand icon on it, indicating that it has been shared: 

Matching a Candidate to a Requisition

You have the ability to match a candidate from your Personal folder to any requisition you have created

Step-by-Step:

1. Click on your **Personal** folder 

2. **Add a check** to the left of the candidate you wish to match

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the checkbox to checkmark the candidate

3. Click on the **Match icon** at the top of the Candidate List: 

4. Click the **Select** button next to a requisition you have created

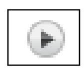
5. Click the **Done** button

6. Read the message that appears and click **Yes**

Navigating the Candidate List and Candidate File

How to access the Job-Specific candidate list for your requisition, and navigate a Candidate File

Steps:

1. Click on **Requisitions** in the core navigation bar to view your Requisition List
2. Click on the **number link (in blue)** in the candidate column next to a Requisition you have created
3. Review the steps of the **Candidate Selection Workflow** on the left hand side under **Selection Workflow Filters**: Prospect, New Candidates, Review, Pre-Interview Checks, Interview, Offer, Background Checks, and Hire.
4. Click on the **New Candidates** step under the **Selection Workflow Filters** IMPORTANT: Always click on the step that the candidate is in, rather than working with candidates from the default global view
5. Your view should be filtered for all new candidates in the **New Candidates** step displayed. Click on the name of the candidate you have selected
6. Click on the **Job Submission** Tab
7. To collapse the **Resume** section using the  button next to **Resume**
8. Be sure to review the sections of the candidate job submission: Resume, Prescreening and Profile
9. To expand the **Resume** section using the  button next to **Resume**
10. Review the fields displayed in the **Candidate Personal Information** sub-section. Note that only fields that have been filled out are displayed, empty fields will only show in edit mode
11. Use the arrow in the **Job Submission Tab**  to navigate to the **Account Information** sub-section
12. Click the **Edit** button at the top of the Candidate's File
13. Review the full list of fields in **Candidate Personal Information** section that are available in edit mode
14. Click the **Cancel** button at the top of the Candidate File
15. Click on the **Attachments** tab

16. If a resume was attached it would appear here

17. Click on the **History** tab and review the candidate's history

18. Click the **Back** icon at the top of the Candidate File to return to the Candidate List: 

Sharing a Candidate

How to share a candidate via email

Steps:

1. Add a checkmark to the left of a candidate who has applied to your requisition

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the box to checkmark the candidate

2. Click on the **Share** icon at the top of the Candidate List: 

3. Type the name of the recipient in the **Name field** on the left hand side under **Quick Filters**

4. Hit **Enter** or click the **Refresh** icon 

5. Click the **Select** button to the right of the name

6. Click the **Next** button

7. Review, select and re-order the sections as desired

8. Click the **Share** button

9. The recipient will access their email with the subject line "**(recruiter's name) has shared candidate information with you"**

Creating a Job Specific Candidate

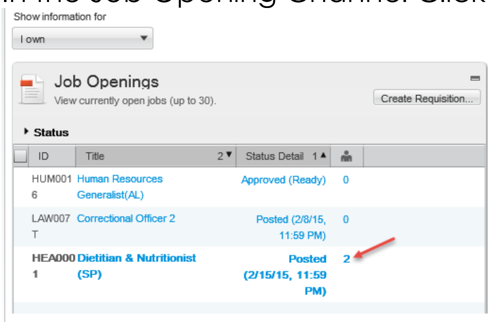
How to create a Job Specific Candidate which will appear in the **Prospect step** of your requisition
Steps: 1. Click on the **Recruiting** link in the core navigation bar 2. Click on the **Create Candidate** button in the **Candidates** channel 3. Click the radio button next to **Create a job-specific submission** 4. Click the **Next** button 5. Click the **Select** button to the right of a Requisition you have created 6. Click the **Next** button 7. Leave the radio button defaulted to **Corporate Recruiting – Create Job Specific Candidate** 8. Click the **Next** button 9. Leave the radio button defaulted to **No, I do not want to use the resume parsing option** 10. Click the **Next** button 11. Enter the Candidate's first name, last name, and email address 12. Click the **Next** button. The system will conduct a duplicate check and determine if the candidate already exists in the system. 13. Click the **Create Candidate** button 14. Complete the required fields marked with a * **red asterisk** 15. Click the **Save and Close** button 16. A message will appear asking if you want to create another candidate using the same criteria, click the **No** button if applicable. 17. The created candidate file will appear

Rejecting a Candidate

How to reject a candidate in the **Prospect Step**

Steps:

1. In the Job Opening Channel Click on the actual number next to the requisition



2. Click on the **Prospect** step link under **Selection Workflow** filters on the left hand side.

   If you are elsewhere in the system:
   i. Click on **Requisitions** in the top navigation bar to go to your Requisition List
   ii. Click on the **number link** in the candidate column next to the Requisition you have created
   iii. Click on the **Prospect** step on the left of the Candidate List

3. Place a checkmark **(√)** on a specific candidate

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the checkbox to checkmark the candidate
4. Click the **Change the Status to Rejected** button

5. Select the radio button next to a disposition from the **Details or Disposition** area. Notice that there is a Send Correspondence box that can be checked off at the same time to send a correspondence.

6. Click the **Save and Close** button

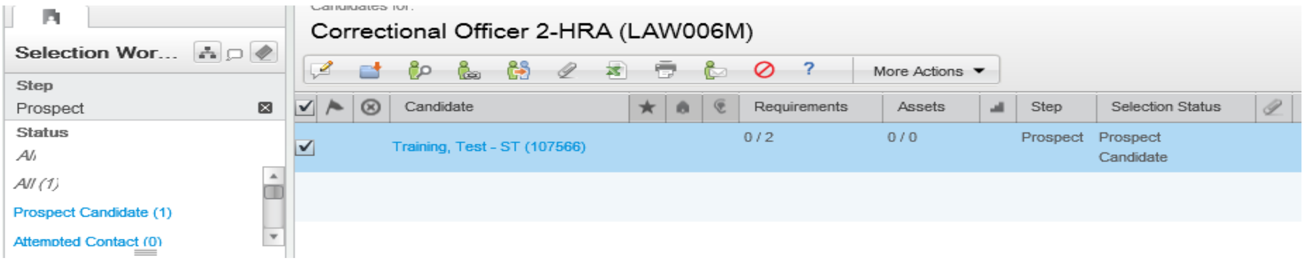
Checkpoint:
- ✓ You should be back at the Candidate List
- ✓ The candidate you have rejected is still in the **Prospect step** with **Rejected Status**.

Sending a Correspondence

How to send a correspondence to a candidate on your requisition

Steps:

1. Navigate to the **Prospect step** of the Requisition Specific Candidate List



2. Place a checkmark **(√)** by the specific candidate you wish to submit a correspondence.

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the checkbox to checkmark the candidate

3. From the **More Actions** drop down menu at the top of the Candidate list, select **Send Correspondence…**

4. Click on the  icon to the right of the **From template** field, to see a list of all templates available

5. Click **Select** next to the template named: **Fax Cover Sheet** (this is only an example, State of Georgia to compose and configure additional message templates if desired)

6. Click the **Next** button

7. Review the Message Preview

8. Click the **Edit** button in the bottom left hand corner, if you need to make edits to the message.

9. Click the **Send** button

10. Click the **X** next to **Prospect** in the **Selection Workflow Filters** on the left hand side. This will remove your filter and bring you back to the global view

Tracking Candidates through the New Candidates Step

For a candidate you create, you should see the candidate in the **New Candidates step** with **Move Forward** status.

NOTE: Any candidate with an ACE icon indicates the candidate meets all entry and preferred qualifications and was automatically sorted to the top of the list.

How to move your candidate to the **Review step** with **To Be Reviewed status**.

Steps:

1. You should be in the **Requisition Specific Candidate List** for this exercise

   If you are elsewhere in the system:

   iv. Click on **Requisitions** in the core navigation bar to go to your Requisition List

   v. Click on the **number link** in the candidate column next to the Requisition you created

2. Click on the **New Candidates** step on the left under the **Selection Workflow Filters** IMPORTANT: Always click on the step that the candidate is in, rather than working with candidates from the global view.

3. Locate the candidate for the specific requisition
   NOTE: *See Page 23 How to Create a Candidate*

4. Add a check **(√)** in the box to the left of the candidate's name

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the box to add a check

5. From the **More Actions** drop down menu at the top of the Candidate list, select **Change Step/Status…**

6. Note the candidate's current step and status at the top of the window

7. The new step will default to the next step **Review** as your candidate was in a completion status in the previous step. The new status will default to the first status in the **Review step** – **Recruiter Review**

8. Click the **Save and Close** button

9. Click the **X** next to **New Candidates** in the **Selection Workflow Filters** on the left and side. This will remove the filter and bring back the global view. The

	candidate should be visible in the global view with **Review step** – **Recruiter Review** status
Checkpoint: ✓ You should be back at the global Candidate List view ✓ The candidate you actioned in this exercise should be in the **Review Step** with **Recruiter Review** status	

Tracking Candidates through the Review Step

Move the candidate into the **Hiring Manager Review status**. In order to proceed, a candidate under consideration in the **Recruiter Review status** should have been reviewed by the Recruiter.

Step-by-Step:

1. You should be in the **Review step** in the Requisition Specific Candidate List for this exercise

   If you are elsewhere in the system:
   i. Click on **Requisitions** in the top navigation bar to go to your Requisition List
   ii. Click on the **number link** in the candidate column next to the Requisition you created
   iii. Click on the **Review step** at the left of the Candidate List

2. Click on the **Review step** on the left hand side under **Selection Workflow Filters**

3. Place a checkmark **(√)** by the specific candidate's name

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, click inside the checkbox

4. From the **More Actions** drop down menu at the top of the Candidate list, select **Change Step/Status…**

5. Note the candidate's current step and status at the top of the window – **Review | Recruiter Review**

6. The **New Status** drop down is automatically set to the next status **Hiring Manager Review**

7. Click the **Save and Close** button

8. Place a checkmark **(√)** by the candidate, select the **More Actions** drop down, and select **Change Step/Status…**

9. Notice that the next available status is automatically selected in the **New Status** drop down – **Move Forward*** (asterisk denotes a completion status)

10. Click the **Save and Close** button

11. Note your candidate is now in the **Review step** with **Move Forward* status**

12. Click on the **X** next to **Review** in the **Selection Workflow Filters** on the left hand side. This will remove your filter and bring you back to the global candidate list view

Checkpoint:
- ✓ Should be back at the Candidate List

Tracking Candidates through the Pre-Interview Checks Step

In order to proceed, a candidate under review in the **Review step** was successful. Track the candidate proceeding to the **Pre-Interview Checks step**.

Steps:

1. Navigate to the **Review step** in the Requisition Specific Candidate List for this exercise

   If you are elsewhere in the system:
   i. Click on **Requisitions** in the top navigation bar to go to your Requisition List
   ii. Click on the **number link** in the candidate column next to the Requisition you created
   iii. Click on the **Review step** at the left of the Candidate List

2. Click on the **Review step** on the left hand side under **Selection Workflow Filters**

3. Place a checkmark **(√)** by the specific candidate's name

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the checkbox to checkmark the candidate

4. From the **More Actions** menu at the top of the Candidate list, select **Change Step/Status…**

5. Note the candidate's current step and status at the top of the window – **Review | Move Forward**

6. The **New Step** drop down should have automatically defaulted to the next step in the process – **Pre-Interview Checks**- as your candidate was in a completion status in the previous step.

7. The **New Status** drop down will default to the first available status– **Pre-Interview Checks**

8. Click the **Save and Close** button

9. Click on the **X** next to **Review** in the **Selection Workflow Filters** on the left hand side. This will remove your filter and bring you back to the global view

10. Click on the **Pre-Interview Checks** step on the left hand side under **Selection Workflow Filters**

11. Place a checkmark **(√)** by the candidate, click on the **More Actions** drop down, and select **Change Step/Status…**

12. The **New Status** drop down will default to the next available status – **Pre-Interview Checks Clear*** (asterisk denotes a completion status)

13. Click the **Save and Close** button

Tracking Candidate in the Interview Step and Interview Scheduler

Introduction: In order to proceed, the candidate has successfully passed the Pre-Interview Checks and is proceeding to the Interview stage.

Steps:

1. Should be in the **Pre-Interview Checks step** in the Requisition Specific Candidate List for this exercise

    If you are elsewhere in the system:
    i. Click on **Requisitions** in the top navigation bar to go to your Requisition List
    ii. Click on the **NUMBER link** in the candidate column next to the Requisition you created
    iii. Click on the **Pre-Interview Checks step** at the left of the Candidate List

2. Click on the **Pre-Interview Checks** step on the left hand side under **Selection Workflow Filters**

3. Place a checkmark **(√)** by the specific candidate's name

    NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the checkbox to checkmark the candidate

4. From the **More Actions** drop down menu at the top of the Candidate list, select **Change Step/Status…**

5. Note the candidate's current step and status at the top of the window – **Pre-Interview Checks | Pre-Interview Checks Clear**

6. The **New Step** drop down should have automatically defaulted to the next step in the process – **Interview** - as your candidate was in a completion status in the previous step.

7. The **New Status** drop down will default to the first available status in the list –**To Be Scheduled**

8. Click the **Save and Close** button

9. Click the **X** next to **Pre-Interview Checks** in the **Selection Workflow Filters** on the left hand side. This will remove your filter and bring you back to the global candidate list view

10. Click on the **Interview** step on the left hand side under the **Selection Workflow Filters**

11. Place a checkmark **(√)** by the candidate, click on the **More Actions** drop down, and select **Schedule an Interview…**

12. Leave the box next to **Invite the Candidate** checked **off**

13. The Subject Line and Organizer should be pre-filled
14. In the Location field enter the desired location
15. Click the **Calendar** next to **Start** and select the desired date
16. In the drop down to the right of the Calendar select the desired time
17. Click the **Calendar** next to **End** and select the desired date
18. In the drop down to the right of the Calendar select the desired time
19. Leave the **Default Time Zone** set to **Eastern Time**
20. Leave the box under **Reminder** checked and in the drop down select the desired time
21. Click the **Next** button
22. The **Hiring Manager** account from the Requisition should be automatically selected in the top portion of the window
23. Click the **Next** button
24. If you wish, you can add a check in the box next to **Send the candidate file to the attendees (but not to the candidate)**
25. If you wish, you can add a check in the box next to **Send the requisition file to the attendees (but not to the candidate)**
26. Click the **Done** button
27. The status of the candidate should automatically change to **Interview Scheduled**
28. Click on the **X** next to the **Interview** step in the **Selection Workflow Filters** on the left hand side. This will remove your filter and bring you back to the global candidate list view

Completing the Offer Grid and Creating an Offer Letter

How to create an offer. In order to proceed, the Candidate needs to be in the Offer step with Offer to be made status.

Steps:

1. You should be in the **Interview step** in the Requisition Specific Candidate List for this job

   If you are elsewhere in the system:
   i. Click on **Requisitions** in the top navigation bar to go to your Requisition List
   ii. Click on the **number link** in the candidate column next to the Requisition you created
   iii. Click on the **Interview** step at the left of the Candidate List

2. Place a checkmark **(√)** by the specific candidate's name

   NOTE: To checkmark a candidate, hover over the candidate's name until a checkbox appears to the left of the candidate, then click inside the checkbox to checkmark the candidate

3. From the **More Actions** drop down menu at the top of the Candidate list, select **Change Step/Status…**

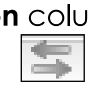
4. Change the **New Status** to **Move To Offer*** and click the **Save and Continue** button

5. The **New Step** should be **Offer** and the **New Status** should be **Offer to be made**

6. Click the **Save and Close** button

7. Click on the name of the specific candidate. Note: There are 4 tabs displayed in the candidate file.

8. From the **More Actions** menu at the top of the Candidate file, select **Create Offer…**Notice a 5th tab appears called **Offers**.

9. Hover over the **Requisition** column, in the grey header area, and click on the **Double arrow icon** that appears:  Field values from the requisition will populate your offer form to give you a starting point

10. Fill out the fields in the **Offer (New)** Column

    Top Section:

11. Target Start Date: **DATE**
12. Start Date: **DATE**
13. Action: **VALUE**

    General Terms Section:

14. Currency: **US Dollar** (Defaulted per the requisition)

15. Pay Basis: (Defaulted per the requisition) It is recommended that pay basis for salaried employees be set for yearly)
16. Salary (Pay Basis): (Defaulted per the minimum on the requisition but should be changed to yearly if pay basis is set at yearly)
17. Vacation Units: **VALUE**
18. FLSA Status:
19. Days Per Week: **VALUE**
20. Hours Per Week: **VALUE**
21. Work Location: Type into the free text field and select it when it appears
22. Position Number: Type into the free text field and select it when it appears
23. Hiring Manager Job Title
24. Unit/Division Name

25. Click the **Save** button to save your progress (**not** Save and Close). If a mandatory field is missed an error will appear at the top of the offer grid.

26. Click the **Create** button next to **Letter Used** (bottom of offer grid)

27. Click the  button to view a list of available offer letter templates. Click **Select** next to the appropriate template

28. A list appears displaying the paragraphs selected by default for this template as well as optional paragraphs. Scroll through the list to view the paragraphs not included by default (not checked). You can hover over the title of any paragraph to view the contents.

29. Click the **Next** button

30. Four free text fields will appear for the recruiter to complete

31. Enter Name of Agency

32. Enter First Pay Check Date

33. Enter Agency HR Lead Name: **NAME**

34. Enter the Agency HR Lead Title: **TITLE**

35. Click the **Next** button

36. Click the **Finish** button

37. Click the **Save and Close** button

Extending an Offer

Drafted offer to be extend to the candidate.
Steps: 1. Click on the **Offers** tab of the Candidate file for this job **If you are elsewhere in the system:** i. Click on **Requisitions** in the top navigation bar to go to your Requisition List ii. Click on the number link in the candidate column next to the Requisition you created iii. Click on the **Offer step** at the left of the Candidate List iv. Click on the name of the Candidate v. Click on the candidate's **Offers** tab 2. From the **More Actions** menu at the top of the Candidate list, select **Extend Offer…** 3. A box will appear asking if you want to extend the offer without approval. Click the **Yes** button. 4. Click the radio button next to **Extend in writing** 5. Click the **Done** button 6. In the **Send Message By** drop down select **E-Offer** NOTE: For the Promotion and Transfer of an Internal Candidate (current State employee) you would **Send Message By** option as **email** 7. Click the **Next** button 8. Click the **Send** button 9. Click the **Sign Out** link in the top right hand corner

Section Two - Onboarding

How a New Hire completes Remaining Onboarding Tasks

Completing the E-offer and the Onboarding Tasks. This job aid will cover the remaining Onboarding tasks.
Steps: 1. The candidate will be logged into the secure Onboarding portal (see previous Job Aid) 2. The first two tasks should be listed as completed - **Notification Sent: Invitation to your Offer Portal** and **Review & Sign: Your Offer Letter**. 3. Candidate will click on the task **Review and Complete: Personal Information Form** 4. Candidate will complete the mandatory fields that are not pre-populated: Social Security Number, Date of Birth, Gender, Ethnicity, Veteran, Emergency Contact Name, Emergency Contact Relationship, and Emergency Contact Phone. 5. Candidate will click the **Submit** button 6. Candidate will click on the next task **Review & Sign: Consent to Perform a Background Check** 7. Candidate will complete the mandatory information that is not pre-populated: Eye Color, Hair Color, Height, Weight, and Employee Signature. 8. Candidate will click the **Submit** button 9. Candidate will click on the next task **Review & Complete: State-wide Employment Policies** 10. Candidate will click on the **Complete** button 11. Candidate will click on the next task **Review & Sign: State-wide Employment Policies** 12. Candidate will enter the Signature 13. Candidate will click the **Submit** button 14. Candidate will click on the next task **Review & Complete: Benefits Information** 15. Candidate will click the **Complete** button 16. Candidate will click on the next task **Review & Complete: Additional Important Documents** 17. Candidate will click on the **Complete** button 18. Candidate will click on the final task **Review & Complete: Important Information**

19. Candidate will click on the **Complete** button
20. Candidate will click the **Sign Out** link in the top right hand corner

Tracking New Hire through the Background Check Step

The New Hire has completed the Consent to Perform a Background Check task which triggered a notification to you to request Background Checks
Steps: 1. Access your State of Georgia email and open the notification with subject line **Candidate Status Notification – Background – Candidate Name** 2. Login with your credentials 3. Click on **Recruiting** 4. In the **Job Openings channel** locate the requisition you created 5. Click on the number link in the candidate column which represents your candidate list 6. Click on the **Offer step** on the left hand side under **Selection Workflow Filters** 7. Your candidate should be in the **Offer step** with **Offer Accepted status**. 8. Add a check mark to the left of the candidate who applied for the job 9. Click on the **More Actions** drop down and select **Change Step/Status…** 10. The **New Step** drop down will default to **Background Checks** 11. The **New Status** drop down will default to **Request Background Check** 12. Click the **Save and Continue** button 13. The next available status will default **Background Check in Progress** 14. Click the **Save and Close** button 15. When the Background Check has been completed, go back into the system and add a check mark to the left of the selected candidate 16. Click on the **More Actions** drop down and select **Change Step/Status…** 17. The next available status will default **Background Check Complete*** 18. Click the **Save and Close** button

Onboarding Task – Candidate Release Form

Introduction: The Background Check is complete and the New hire

Steps:

1. Click on the drop down arrow next to the home button in the top left hand corner
2. Select **Transitions**
3. Locate the Tasks section in the upper portion of the screen
4. Click on the blue **Execute** link to the right of the task Candidate Release Form for your New Hire

Name ▲	Due Date	Candidate/Employee	Priority	Status	Assigned to	Owned by	Actions
Task - Candidate Release Form	Jan 22, 2015	Demo2, Maria	Normal	In progress	Gossop, Suzette	Gossop, Suzette	Execute Reassign

5. In the **Background Check Result** drop down select **Cleared to Start**
6. Enter your signature in the **Recruiter Signature** field
7. Click the **Submit** button
8. The **Candidate Release Form** task should no longer be visible in the Tasks section

Tracking Candidates through the Hire Step

You are ready move the candidate to the Hire step

Steps:

1. Click on the home button  in the top left hand corner
2. Click on **Recruiting**
3. In the **Job Openings channel** locate the requisition you created
4. Click on the number link in the candidate column which represents your candidate list
5. Add a check on the left hand side of the candidate's name
6. Click on the **More Actions** drop down and select **Change Step/Status…**
7. The **New Step** is defaulted to **Hire** and the **New Status** is defaulted to **To Be Hired**
8. Change the New Status to **Hire External***

   NOTE: For a current State employee, you will use Hire Internal*
9. Click the **Save and Close** button
10. A warning message will appear advising you that the final opening on the requisition will be filled and the requisition will be closed. It will also ask you to confirm you want to hire the candidate. Click the **Yes** button.

Congratulations you have processed your hire!

Section Three – Reporting

Viewing and Downloading Custom Reports

How to view and download a Standard and Custom Report.

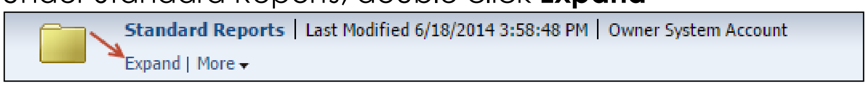
Steps:

1. Click on the **Oracle Business Intelligence** link from the Home Page under Centers. A new window will open and you will be directed to the Oracle Business Intelligence home page.

2. Click on the **Catalog** option on the top right menu bar.

3. From the left Folders panel, click **Shared Folders**

4. Under Standard Reports, double click **Expand**



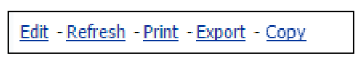
5. Under Requisition Pipeline Detail (Active Requisitions) click **Open**

6. From the Report Prompts menu select the appropriate prompt selection (i.e. **Req Creation Date – Enter a date range**)

7. Select **OK**

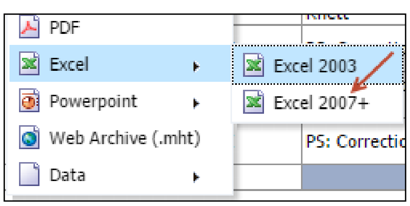
8. Report is generated.

9. Scroll to the bottom of the report to see options:



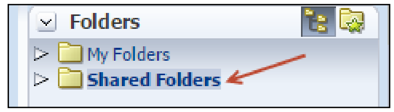
10. The report can be exported for further review and analysis into PDF, Excel, PPT, CSV and XML

11. Left click once on **Export** and select **Excel 2007+**



12. Report will download to Excel.

13. Click on the **Catalog** option again on the top right menu bar.

14. From the left Folders panel, click **Shared Folders** 

15. Double click on **My Company Shared** link in the top right hand corner

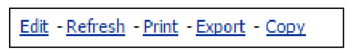
16. Under Custom Report, double click **Expand**

17. Under Recruitment Activity, click **Open**

18. From the Report Prompts menu select the appropriate prompt selection (i.e. **Latest Filled Date – Enter a date range**)

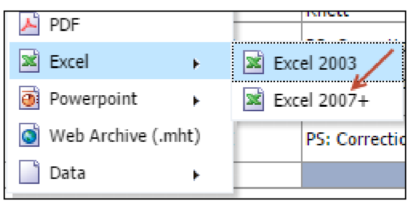
19. Select **OK**

20. Report is generated

21. Scroll to the bottom of the report to see options: 

22. The report can be exported for further review and analysis into PDF, Excel, PPT, CSV and XML

23. Left click once on **Export** and select **Excel 2007+**



24. Report will download to Excel.

Note: Report prompts for Standard reports are Taleo delivered therefore no modifications are made to the headers and levels. Custom reports have modified prompts based on state of Georgia organizational structure.