Contents

Section One – Recruiting ................................................................................................................. 3
  Accessing Team Georgia Careers ................................................................................................. 4
  My Setup Preferences .................................................................................................................. 5
  Creating a Requisition .................................................................................................................. 6
  Approving a Requisition ............................................................................................................... 9
  Completing a Requisition ............................................................................................................ 10
  Posting a Requisition .................................................................................................................. 11
  Filtering a Requisition List .......................................................................................................... 13
  Conducting a Quick and Specific Search ..................................................................................... 14
  Conducting an Advanced Search ................................................................................................. 15
  Filing Candidate into a Folder and Creating a Self-Assigned Task ............................................... 16
  Accessing and Creating a Folder ................................................................................................. 17
  Sharing a Folder ......................................................................................................................... 18
  Matching a Candidate to a Requisition ....................................................................................... 19
  Navigating the Candidate List and Candidate File .................................................................. 20
  Sharing a Candidate .................................................................................................................... 22
  Creating a Job Specific Candidate .............................................................................................. 23
  Rejecting a Candidate ............................................................................................................... 24
  Sending a Correspondence ......................................................................................................... 25
  Tracking Candidates through the New Candidates Step ............................................................ 26
  Tracking Candidates through the Review Step ......................................................................... 28
  Tracking Candidates through the Pre-Interview Checks Step .................................................. 29
  Tracking Candidate in the Interview Step and Interview Scheduler ......................................... 31
  Completing the Offer Grid and Creating an Offer Letter ............................................................ 33
  Extending an Offer ...................................................................................................................... 35

Section Two - Onboarding ............................................................................................................. 36
  How a New Hire completes Remaining Onboarding Tasks ....................................................... 37
  Tracking New Hire through the Background Check Step ........................................................... 39
  Onboarding Task – Candidate Release Form .............................................................................. 40
  Tracking Candidates through the Hire Step .............................................................................. 41

Section Three – Reporting ............................................................................................................ 42
  Viewing and Downloading Custom Reports ............................................................................. 43
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**

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.

<table>
<thead>
<tr>
<th>Steps:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on <strong>Requisitions</strong> in the core navigation bar to access the <strong>Requisition List</strong></td>
</tr>
<tr>
<td>2. Under the <strong>Show Requisitions For</strong> drop down and make a selection</td>
</tr>
<tr>
<td>3. Click the <strong>Advanced Filters</strong> button in the bottom left hand corner</td>
</tr>
<tr>
<td>4. Choose any of the various options for searching</td>
</tr>
<tr>
<td>5. Type in the search criteria and click the <strong>Add</strong> button</td>
</tr>
<tr>
<td>6. Click the <strong>Done</strong> button</td>
</tr>
<tr>
<td>7. If you wish to remove the filter, click the <strong>X</strong> next to the Keyword in the top portion of the screen</td>
</tr>
<tr>
<td>8. Change the <strong>Show Requisitions For</strong> drop down back to <strong>I Own</strong></td>
</tr>
</tbody>
</table>
## Conducting a Quick and Specific Search

You will access a candidate using Quick and Specific Search.

<table>
<thead>
<tr>
<th>Steps:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on the applicable link from the Team Georgia Careers section and log-in to the system</td>
</tr>
<tr>
<td>2. Click on <strong>Recruiting</strong></td>
</tr>
<tr>
<td>3. Locate the <strong>Quick Search</strong> 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: 🧙</td>
</tr>
<tr>
<td>4. Type the <strong>Candidate's Name</strong> into the <strong>Quick Search</strong> field</td>
</tr>
<tr>
<td>5. Click on the <strong>Search</strong> icon beside the <strong>Quick Search</strong> field: 🕵️‍♂️</td>
</tr>
<tr>
<td>6. The <strong>Candidate's name</strong> should appear in the results list</td>
</tr>
<tr>
<td>7. Click on the <strong>Quick Search</strong> icon to the left of the <strong>Quick Search</strong> field: 🧙‍♂️, and in the drop down select <strong>Specific Candidate</strong></td>
</tr>
<tr>
<td>8. In the <strong>First Name and Last Name</strong> field type the Candidate’s first and last name in the applicable fields</td>
</tr>
<tr>
<td>9. Click the <strong>Search</strong> button</td>
</tr>
<tr>
<td>10. See the <strong>Candidate</strong> with the <strong>First and Last Name</strong> appearing in the results list</td>
</tr>
<tr>
<td>11. Reset the <strong>Quick Search</strong> field in the top right hand corner by clicking on the <strong>X</strong> in the field</td>
</tr>
</tbody>
</table>
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 [Customize...] 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 [Save Query...] 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

<table>
<thead>
<tr>
<th>Steps:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on <strong>Recruiting</strong> in the core navigation bar</td>
</tr>
<tr>
<td>2. Click on the <strong>Search Queries</strong> link in the top right hand corner</td>
</tr>
<tr>
<td>3. Click the <strong>blue title link</strong> to access a saved search query</td>
</tr>
<tr>
<td>4. Click the <strong>Search</strong> button</td>
</tr>
<tr>
<td>5. Add a check in the box to the left of the candidate</td>
</tr>
<tr>
<td><strong>NOTE:</strong> 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</td>
</tr>
<tr>
<td>6. Click on the <strong>Folder icon</strong> at the top of the Candidate List</td>
</tr>
<tr>
<td>7. Make sure the <strong>Personal Folder</strong> is highlighted in <strong>blue</strong></td>
</tr>
<tr>
<td>8. Click the <strong>Done</strong> button</td>
</tr>
<tr>
<td>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</td>
</tr>
<tr>
<td>10. Click the <strong>More Actions</strong> drop down and select <strong>Create Self-Assigned task</strong></td>
</tr>
<tr>
<td><strong>NOTE:</strong> <strong>STEP 11</strong> is an example of a self-assigned task you can create</td>
</tr>
<tr>
<td>11. Enter <strong>Call Candidate</strong> in the <strong>Name</strong> field, select a <strong>Due Date</strong> of tomorrow and in the <strong>Reminder</strong> drop down select <strong>On Due Date</strong></td>
</tr>
<tr>
<td>12. Click the <strong>Save and Close</strong> button</td>
</tr>
<tr>
<td>13. Click the <strong>Sign Out</strong> link in the top right hand corner</td>
</tr>
</tbody>
</table>
# Accessing and Creating a Folder

**How to access your candidate folders and create a new folder**

<table>
<thead>
<tr>
<th>Steps:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on the applicable link from the Team Georgia Careers section and log-in to the system</td>
</tr>
<tr>
<td>2. Click on the <strong>Candidates</strong> link in the core navigation bar</td>
</tr>
<tr>
<td>3. Click on the <strong>Folders</strong> tab, located to the left of the Candidate List and directly above the Quick Filters</td>
</tr>
<tr>
<td>4. Candidates that have previously been filed will be shown in the <strong>Personal Folder</strong></td>
</tr>
<tr>
<td>5. Be sure that the <strong>Personal Folder</strong> is highlighted in <strong>blue</strong></td>
</tr>
<tr>
<td>6. Click on the <strong>Manage</strong> drop down located above your personal folder</td>
</tr>
<tr>
<td>7. Select <strong>Create</strong></td>
</tr>
<tr>
<td>8. Type in a name for the folder</td>
</tr>
<tr>
<td>9. Hit the <strong>Enter</strong> key on your keyboard</td>
</tr>
</tbody>
</table>

**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

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

   ![Job Openings](image)

   - Job Openings
     - View currently open jobs (up to 25)

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

<table>
<thead>
<tr>
<th>Checkpoint:</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ You should be back at the global Candidate List view</td>
</tr>
<tr>
<td>✓ The candidate you actioned in this exercise should be in the <strong>Review Step</strong> with <strong>Recruiter Review</strong> status</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Steps:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Access your State of Georgia email and open the notification with subject line <strong>Candidate Status Notification – Background – Candidate Name</strong></td>
</tr>
<tr>
<td>2. Login with your credentials</td>
</tr>
<tr>
<td>3. Click on <strong>Recruiting</strong></td>
</tr>
<tr>
<td>4. In the <strong>Job Openings channel</strong> locate the requisition you created</td>
</tr>
<tr>
<td>5. Click on the number link in the candidate column which represents your candidate list</td>
</tr>
<tr>
<td>6. Click on the <strong>Offer step</strong> on the left hand side under <strong>Selection Workflow Filters</strong></td>
</tr>
<tr>
<td>7. Your candidate should be in the <strong>Offer step</strong> with <strong>Offer Accepted status</strong>.</td>
</tr>
<tr>
<td>8. Add a check mark to the left of the candidate who applied for the job</td>
</tr>
<tr>
<td>9. Click on the <strong>More Actions</strong> drop down and select <strong>Change Step/Status…</strong></td>
</tr>
<tr>
<td>10. The <strong>New Step</strong> drop down will default to <strong>Background Checks</strong></td>
</tr>
<tr>
<td>11. The <strong>New Status</strong> drop down will default to <strong>Request Background Check</strong></td>
</tr>
<tr>
<td>12. Click the <strong>Save and Continue</strong> button</td>
</tr>
<tr>
<td>13. The next available status will default <strong>Background Check in Progress</strong></td>
</tr>
<tr>
<td>14. Click the <strong>Save and Close</strong> button</td>
</tr>
<tr>
<td>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</td>
</tr>
<tr>
<td>16. Click on the <strong>More Actions</strong> drop down and select <strong>Change Step/Status…</strong></td>
</tr>
<tr>
<td>17. The next available status will default <strong>Background Check Complete</strong>*</td>
</tr>
<tr>
<td>18. Click the <strong>Save and Close</strong> button</td>
</tr>
</tbody>
</table>
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
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: [Edit · Refresh · Print · Export · Copy]

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.