cvMail

FIRM ADMINISTRATION

FULL SPECTRUM RECRUITMENT (FSR)

THOMSON REUTERS

REVISION HISTORY

Name	Date	Version	Summary of changes
Cate McNamara	23/11/10	V0.1	Document structure created.
Rebecca Stuttard	13/01/11	V0.2	Document completed
Rebecca Swan	04/02/14	V0.3	Document updated

CONTENTS

ABOUT THIS DOCUMENT

INTENDED READERSHIP

This document is intended for cvmail FSR System Administrator users (“Super Users”).

IN THIS GUIDE

This guide provides a detailed working description of the Firm Administration are of the cvmail FSR system. In some instances, the chapters in this document will provide the reader with working examples of the functionality of certain menu items within System Administration. However, for a more practical perspective, readers are encouraged to refer to the cvmail Standard User Guide, as well as cvmail Quick Guides on relevant topics.

FEEDBACK

If you have any comments on this document please contact the Reuters Transactions Group Sales and Trading documentation team at tgst.documentation@reuters.com.

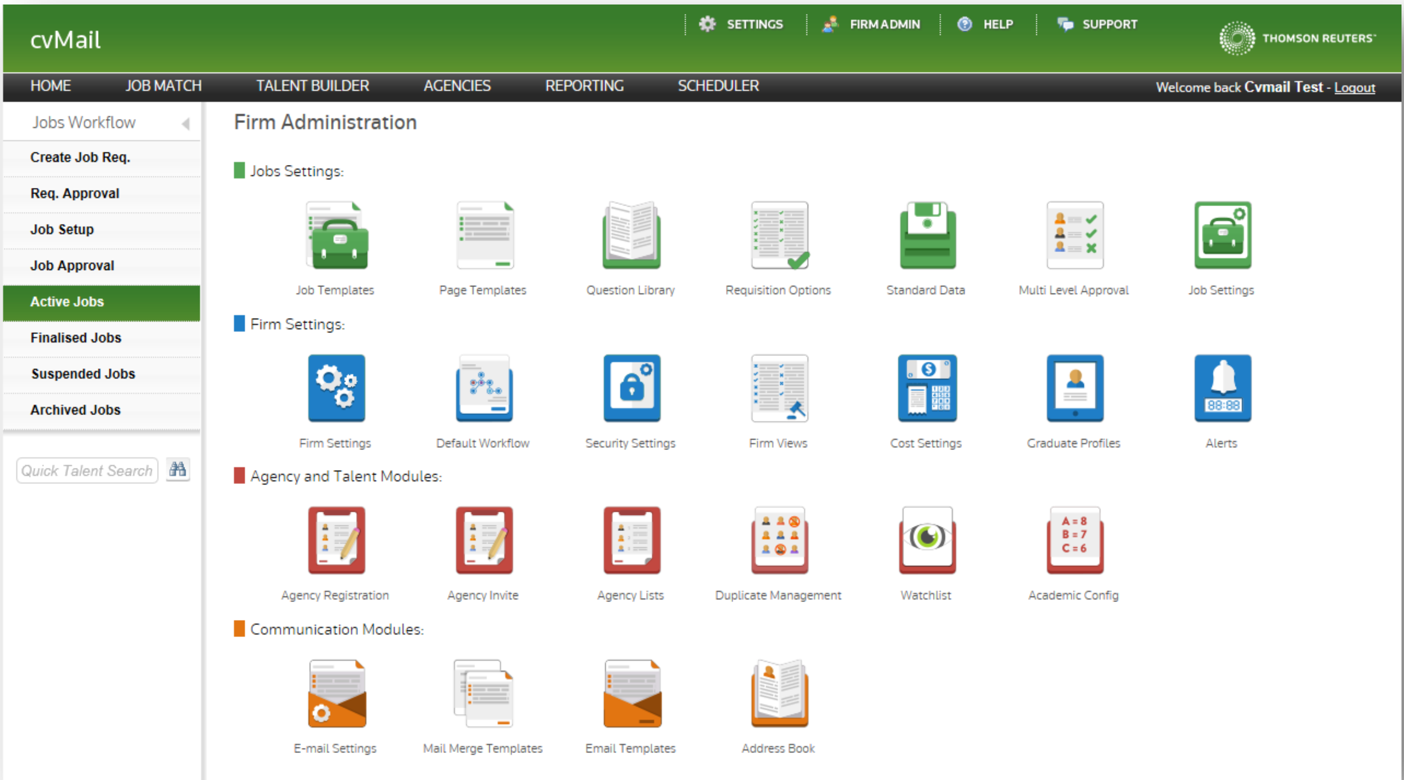
CHAPTER 1 WHAT IS FIRM ADMINISTRATION?

1.1 OVERVIEW

Firm Administration contains all the configuration settings for your FSR database. Any changes made in Firm Administration affect all users of the FSR system and therefore should be handled by the person nominated as System Administrator for your company only.

The configuration of Firm Administration is usually done at the time your FSR system is implemented however ad hoc modifications are required to keep the system optimised and delivering efficiencies.

The Firm Administration menu is located in the top left hand corner of FSR:



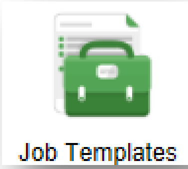
1.1.1. Why does my Firm Administration look different?

The options **visible** in Firm Administration can be restricted using 'Security Settings'. If you are not able to see all the menu items above, security is **restricted** for your **login**. Changes to your security access can be carried out by the system administrator for your company or in writing to cvmail.

cvmail usually administers the security for all databases unless there is a specific agreement in place.

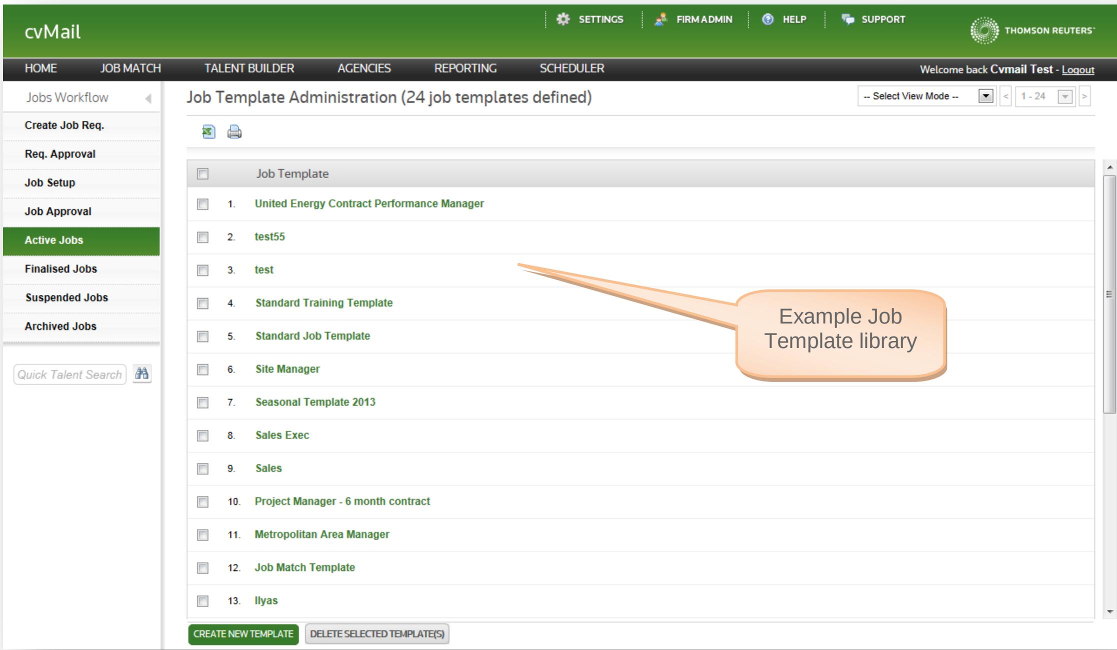
CHAPTER 2 JOB TEMPLATES

2.1 OVERVIEW



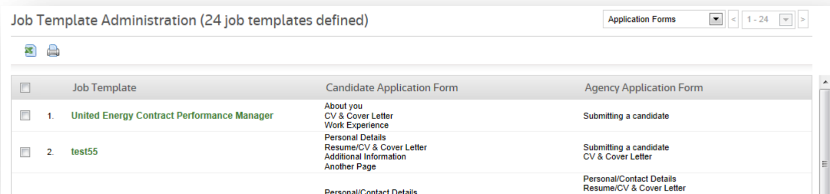
Job templates are one of the most important aspects of FSR. When set up correctly, they will save you valuable time during the job setup process. Ideally you should aim to have a job template for the *commonly recruited* for roles within your company and a **standard template** that covers all other roles.

To view the available job templates for your database, click on the **Job Templates** menu option (above):



2.1.1. Review Application Forms

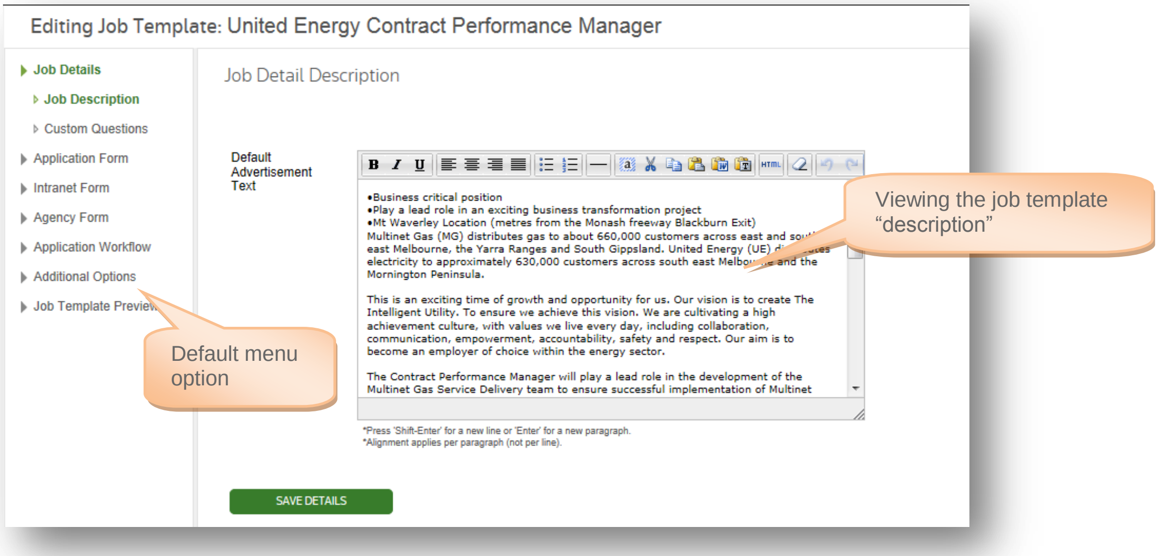
Change your '**View**' to '**Application Forms'** from the top right hand corner of the job templates screen. This view will instantly show you the pages that make up the application forms contained within each template. You should aim to have uniform and consistent application forms within your job templates, as this helps with *reporting* and *talent management*.



2.1.2. Viewing a job template

To view a job template, click on the **title** of the template. The **Editing Job Template** window appears to show you the following options:

OPTION	SUB MENU	DETAILS
Job Details	Job Description	The information added here is used as the job advertisement for all advertisements including third party job boards such as Seek and MyCareer.
	Custom Questions	Custom questions can be added to a job template, these questions appear on the Job Details page of your position when copied from the template.
Application Form	Add / Edit Pages	This is where the application form for the template is created and managed. An application form is built up as pages, with related questions on each page. You can edit pages in this section, as well as specific questions. This application form is presented to all external candidates, and also used as the default app form for all other applications.
	Add / Edit Questions	
Intranet Form	Add / Edit Pages	This is the application form that is visible to Internal applicants. Internal applicants are identified by their email domain or by entering an 'internal password' Functionality as above
	Add / Edit Questions	
Agency Form	Add / Edit Pages	This is the application form that is visible to agents. Agents are identified by the registration process Functionality as above
	Add / Edit Questions	
Application Workflow	n/a	
Additional Options	Auto Notify	Offers several advanced automated features that help to speed up the recruitment process. Auto Notifications control e-mails that will be automatically sent out when applications are moved into particular folders in the workflow. Screening can be set up to automatically move candidates into particular folders based on application responses. Auto scoring allows the recruiter to configure weightings for custom questions on the app form. Scoring/Coding allows the user to use predefined scoring "codes" for application ranking.
	Screening	
	Auto Scoring	
	Scoring/Coding	
Job Template Preview	n/a	Here you can review all of the setup completed above. If satisfied, click "finish".

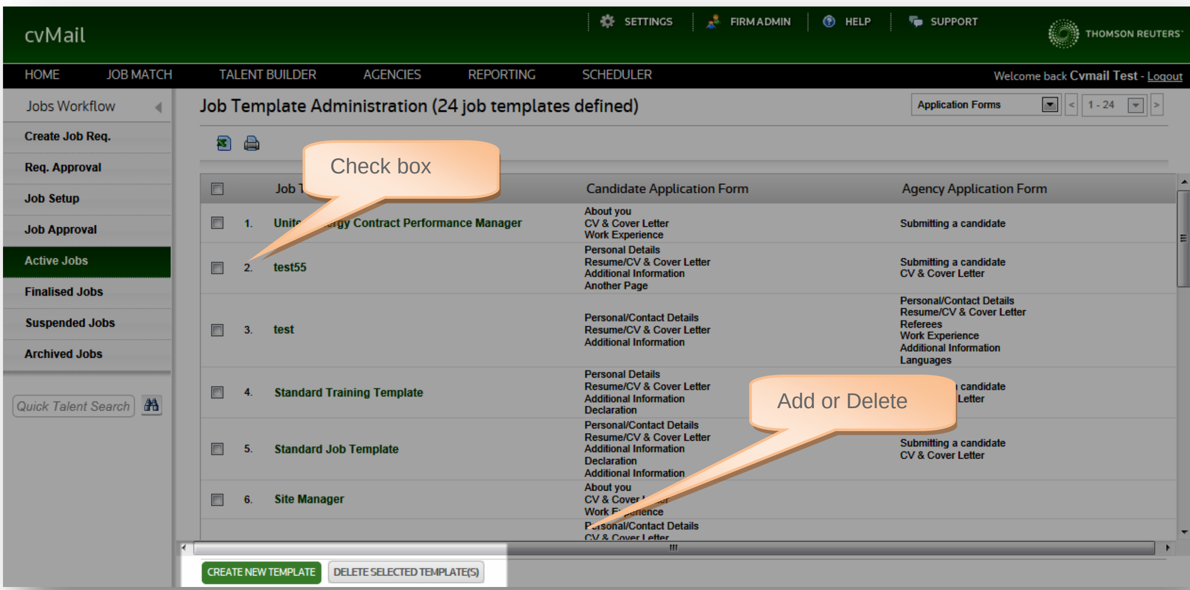


2.1.3. Managing job templates

Users have the ability to **create**, **delete** and **edit** Job Templates. The following will explain how to add a new Template as well as how to delete a current template.

> **Note**
>
> *Be aware that once you have deleted a Job template from the library, you will not be able to undo the action. You will need to recreate the template from scratch,*

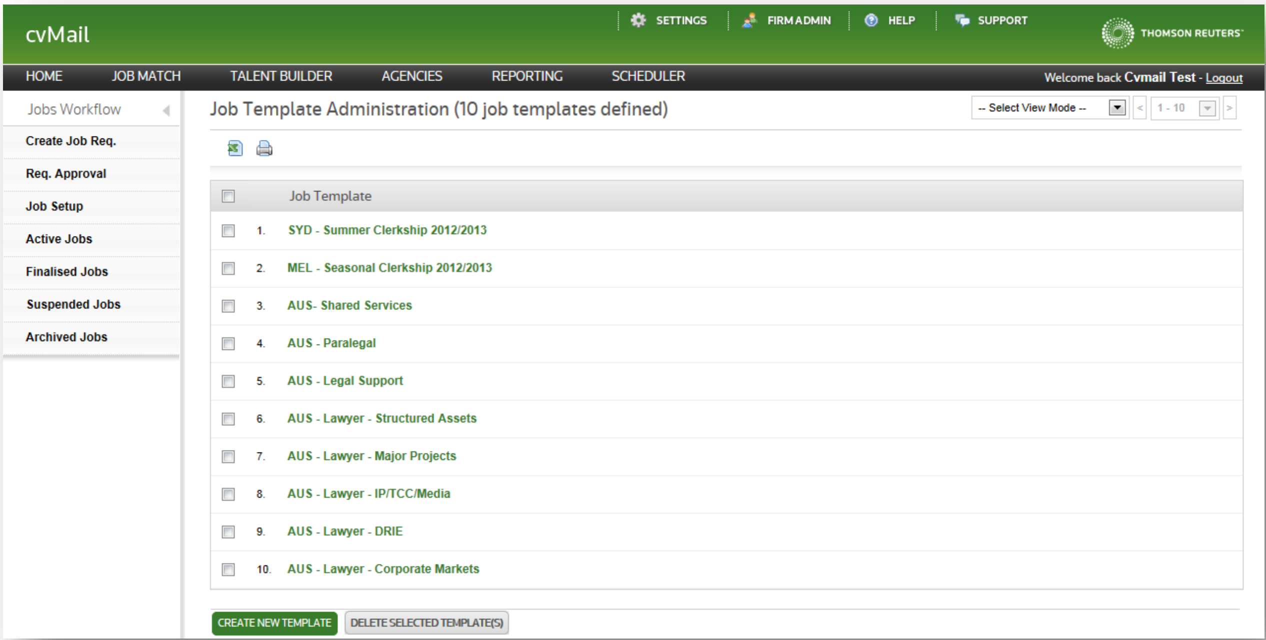
To **add** or **delete** a new job template to the template library, navigate back through **Firm Admin I Job Templates**, until you see the screen below – select the appropriate button:



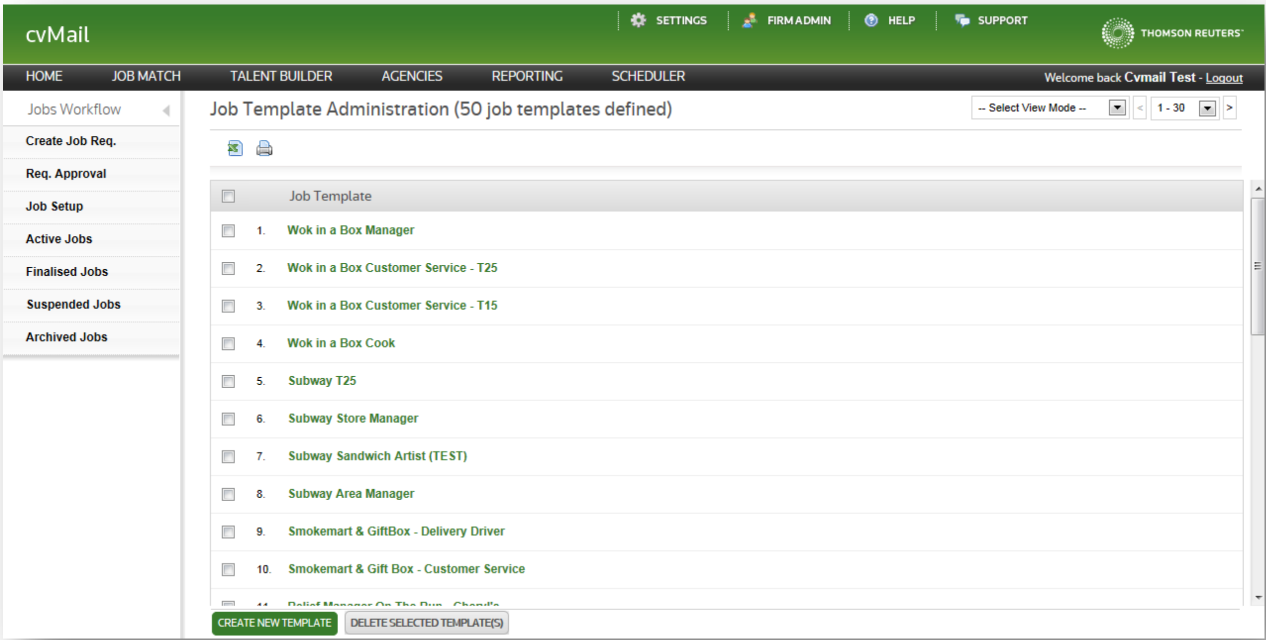
2.1.3.1. Job Template Library examples

Some useful Template Library set-ups are below.

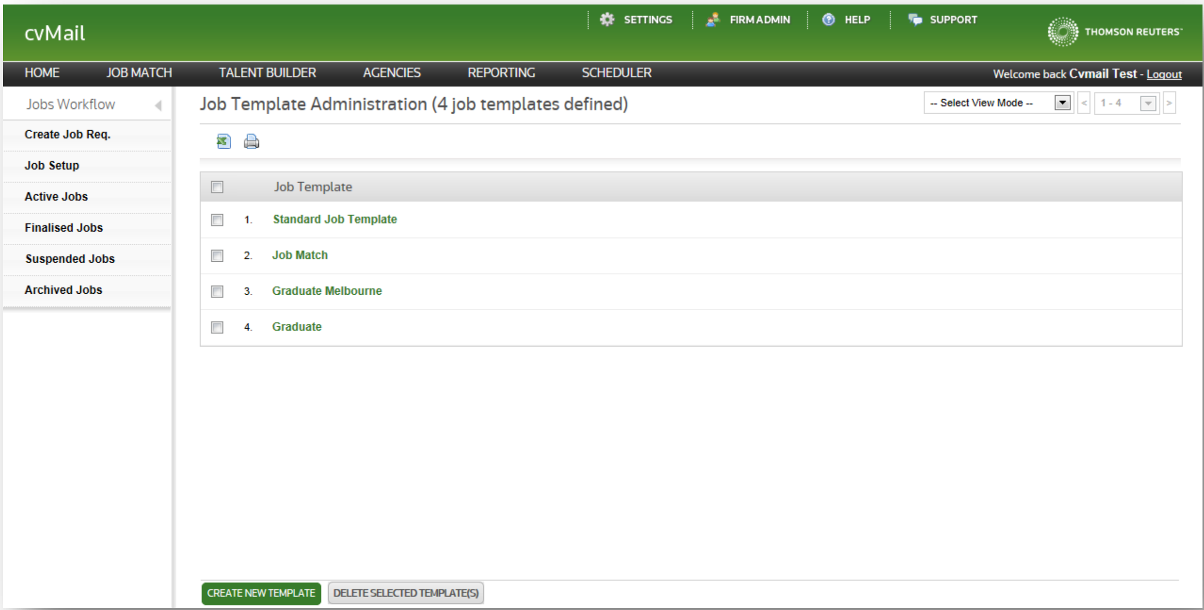
1. *Templates prefixed by State and Country (Australia, SYD, MEL etc.):*



2. *Templates prefixed by brand:*

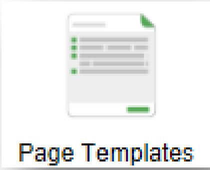


3. *Templates prefixed by Type (e.g.: legal) and basic:*



CHAPTER 3 PAGE TEMPLATES

3.1 OVERVIEW



Page Templates allow the FSR user to create a*pplication form pages*, add customs questions to those pages, which are then stored in the database. This enables the user to use these pre-defined page templates to build a Job Template or build an application form (Application, Internal or Agency Form), on the fly, very easily.

Note

Users can build Page templates based on already existing page templates by using the 'copy an available page template' function.

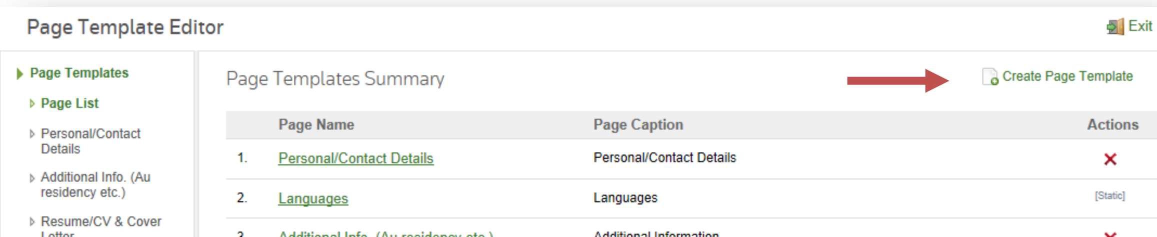
3.1.1. Page Template setup

Begin creating a page template by clicking on **Create Page Template** and then follow the steps below:

1. *Enter in a **template name***
2. *Keep in mind, page template names appear on the Job Application form - so **clear** and **concise** naming is important.*
3. *Select to use the **Copy an available page template to use an existing template** as the base for the new template or create a template from scratch.*
4. *Add questions to the page that already in exist in the Question Library. Users can also add questions to the Question Library from within the Page Template setup menu.*
5. *Users can arrange questions on the page into logical order using the arrow buttons*

3.1.2. Creating a Page template

Clicking on **Create Page Template** will begin the process.



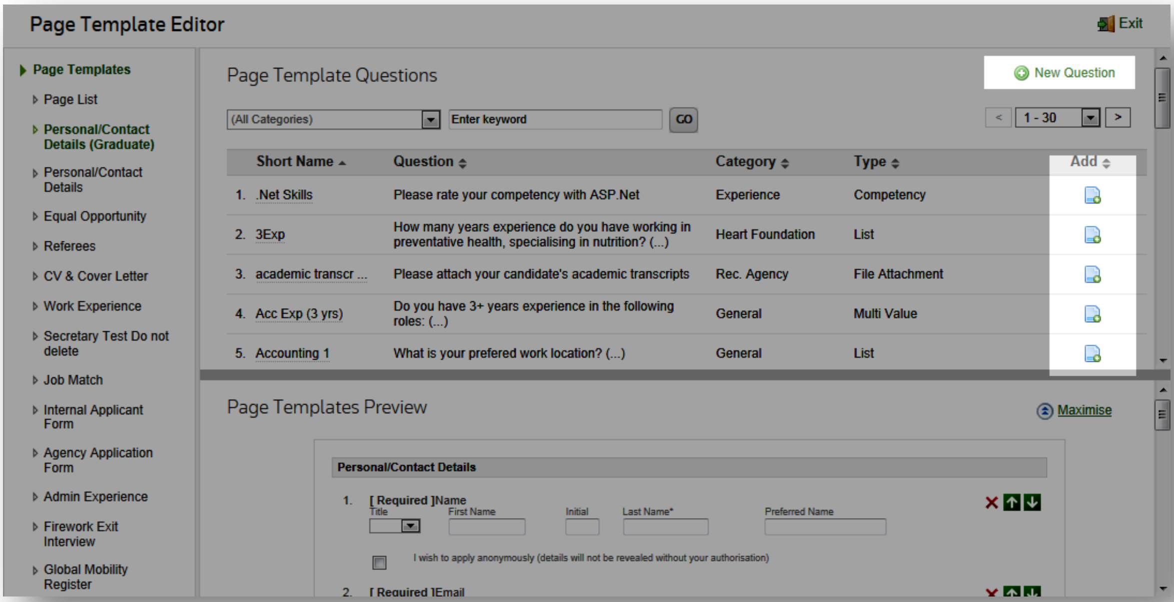
3.1.3. Adding Questions to the Page Template

You can start to add any additional questions to the page template by selecting them from the library and choosing to “add”.

You also have the option to create a new question (top right hand corner) to the library, and then add it to the page template.

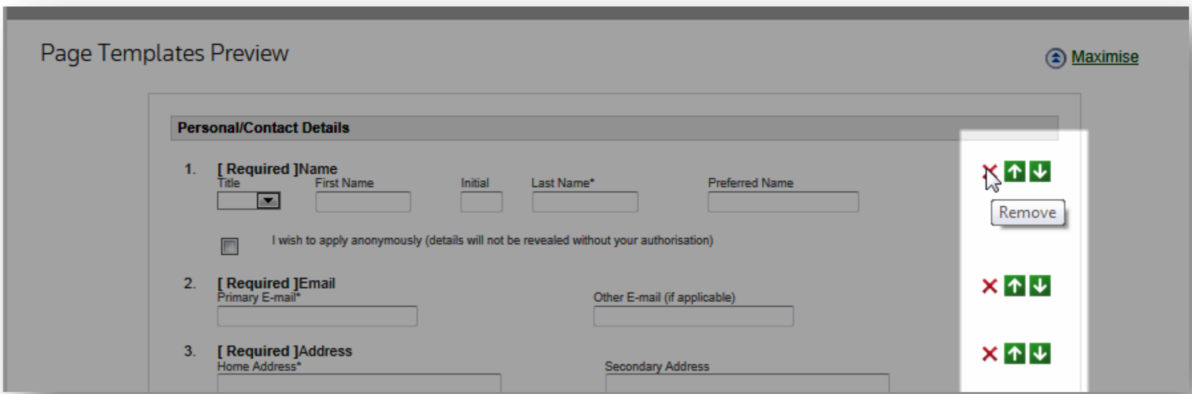
Note

If you create brand new questions to the library, and then add them to your page template – the questions will be included on this template going forward (for all other users).



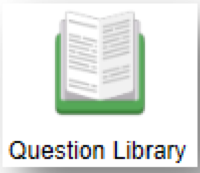
3.1.4. Configuring the Page Template

Questions can be removed or re-ordered on the page template from the Page Templates Preview screen.



CHAPTER 4 QUESTION LIBRARY

4.1 OVERVIEW



The **Question Library** section manages all questions that can be applied in different areas within the system. Questions are most commonly used for Application forms of all types (candidate, agency registration and the like).

The Question Library sub-menu allocates questions among Candidate Data, Agency Data and Job Data. The pane on the right-hand side displays a list of **available questions** in the selected section. All of the listed questions can be **edited** or **deleted** in this area.

Note

You can only delete questions from the Question Library. You can edit questions to some extent in other areas of the system however deletion is exclusive to the library.

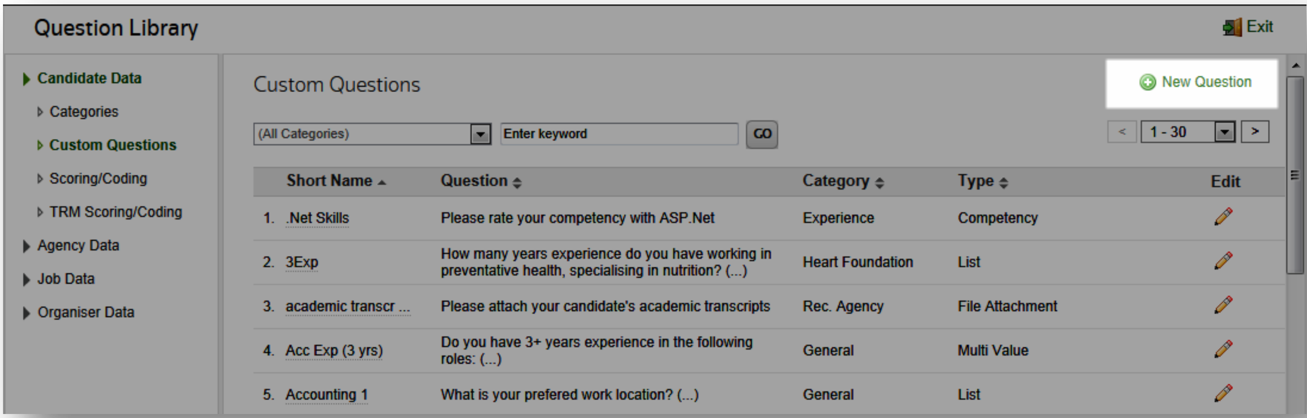
NAME	DESCRIPTION
Categories	Questions can be managed easily if they are stored in convenient categories. Structured categories also benefit the FSR user in the Talent Builder module, searching for specific answers to questions, by candidates, becomes a simply process.
Custom Questions	All questions created by FSR users are located here.
Scoring / Coding	Application Scores/Codes offer an objective method of assessing and/or saving external assessment of applicants.
TRM Scoring / Coding	Talent Scores/Codes offer similar functionality, but update the applicant's Talent Record. Talent Scores/Codes are common to all applications across all jobs and are used for recording more generalised skills assessment.

In the Custom Questions section, particular questions can be located easily by selecting their containing Category from the drop-down list in the upper-left corner of the screen. This will reload the question list, with only those questions contained in the selected category.

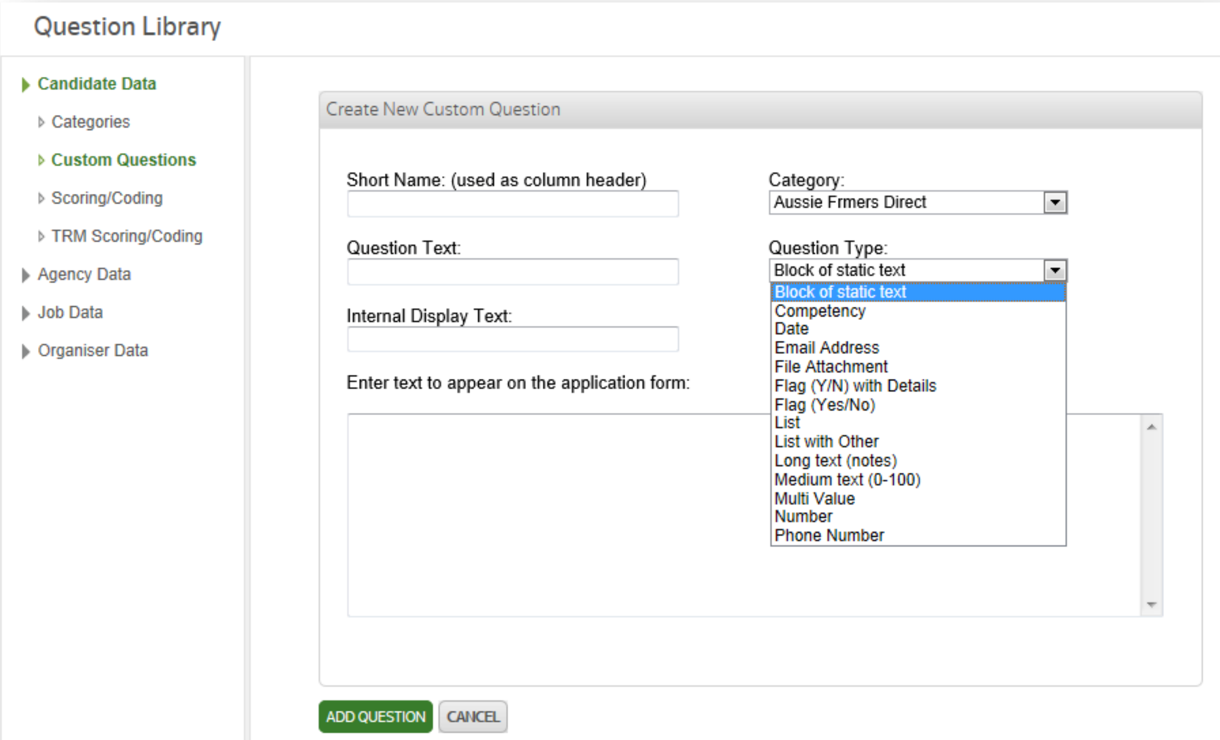
The question list can be filtered further according to a keyword search. Type a keyword in the text-box at the top of the screen and click Go. This will reload the question list, with only those questions contained in the selected category that also match the keyword search.

4.1.1. Creating a Question

Under the **Candidate Data > Custom Questions**, users can create their own questions and save them in the database.



✓ *Clicking on **New Question** will present the user with the Create New Custom Question form seen below*:



NAME	DESCRIPTION
Short Name	To be used as a column heading, when tabulating applicants' responses to this question
Category	Organise questions into categories of usage and relevance, for easier implementation
Question Text	The actual wording of the question, to be displayed on the Application Form
Question Type	Choose from a variety of objective and subjective question types
Internal Display Text	Displayed when this question is viewed as part of an application (after submission).

- ✓ *To **add** a new question to the Question Library, click the **New Question** button near the top right-hand corner of the screen.*
- ✓ *On the Create New Custom Question screen, first select a **Question Type** and then fill in the details according to the descriptions above.*
- ✓ *Save the question into the Question Library by clicking on **Add Question.***

CHAPTER 5 STANDARD DATA

5.1 OVERVIEW

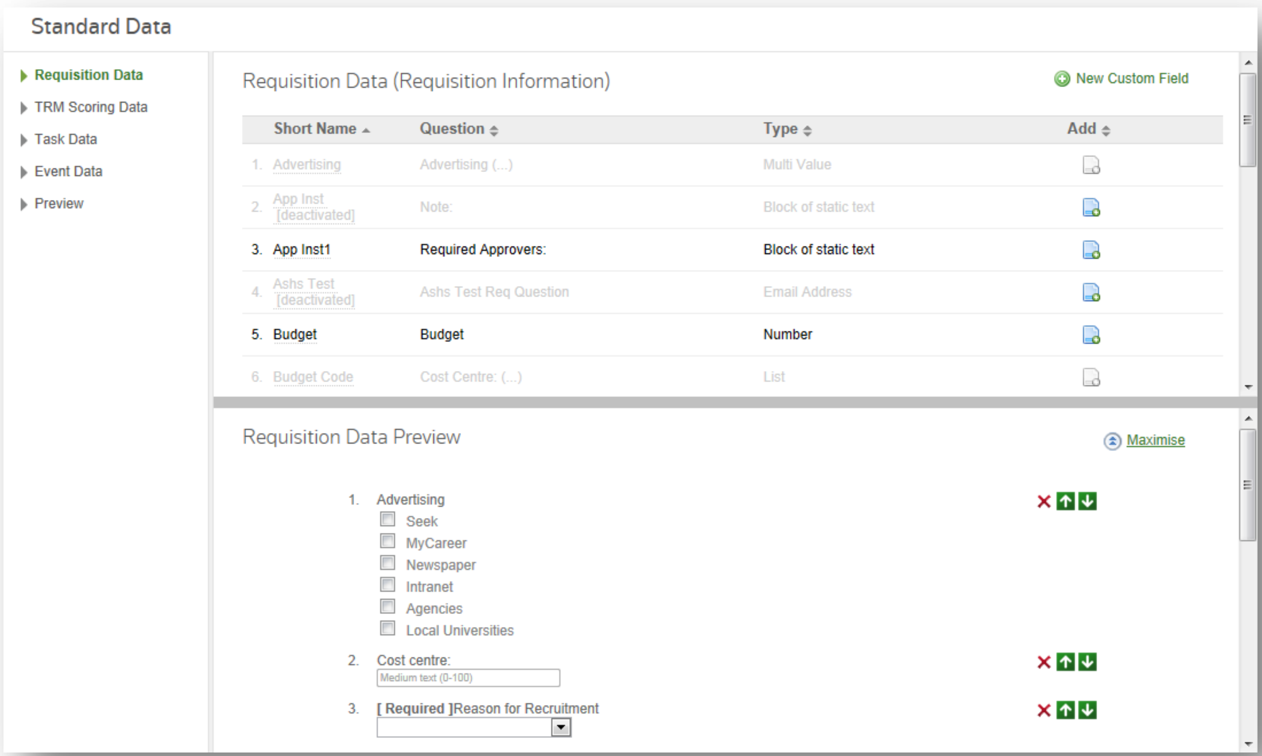
This area of Firm Administration is a *multi-configuration* area and *record library*. The user can **create** new fields in several areas including:

- ✓ *The Requisition form*
- ✓ *Scoring/Rankings for the candidate Permanent Record*

Note
Questions and codes created here can also be created and managed within the Question Library.

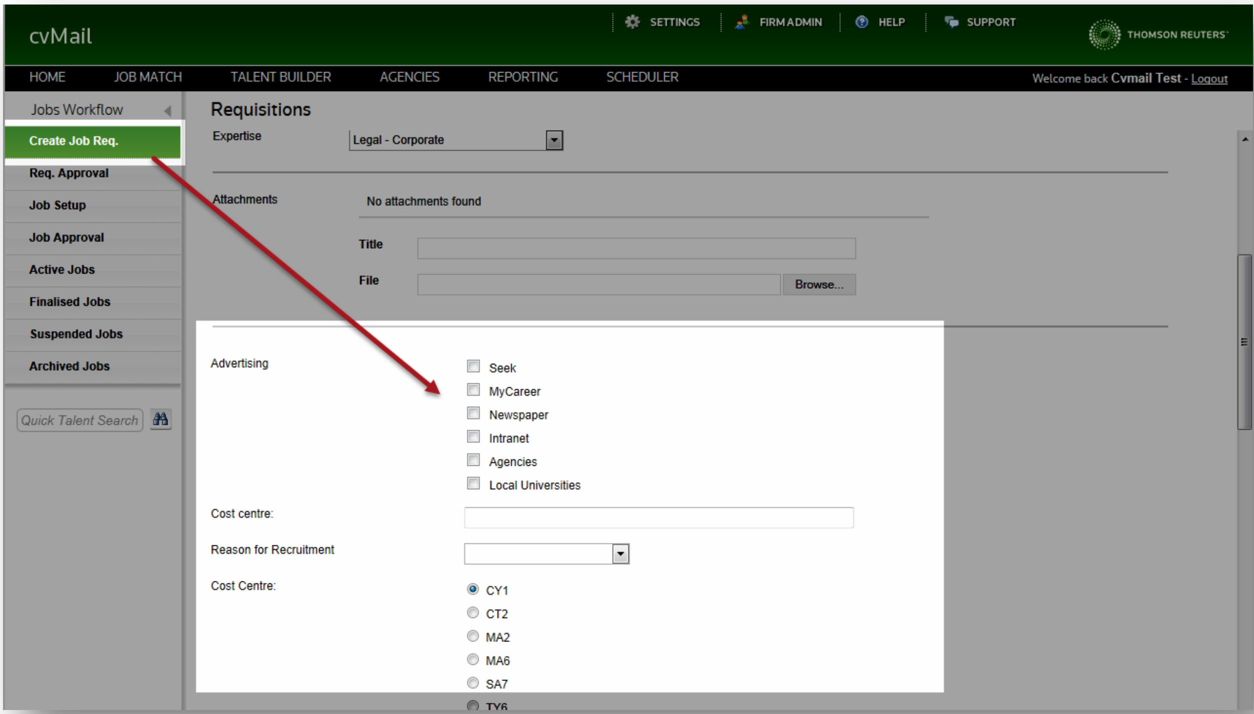
As well as allowing the user to **create** fields in this section, the system also allows us to **add** these newly created fields onto useable areas of the system – for example, onto the requisition form.

The sub-menu on the left-hand side offers access to Requisition Data and TRM Scoring Data, as well as a Preview of the Standard Data.



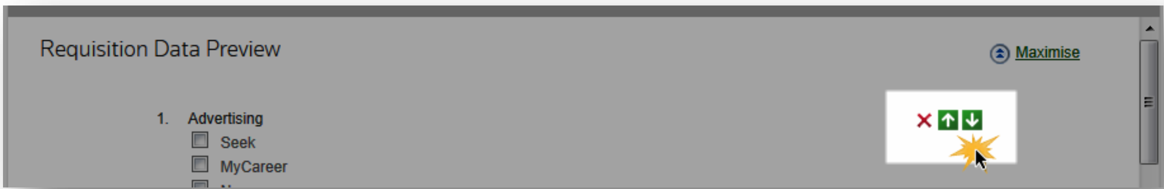
5.1.1. Requisition Data

Under this menu selection, the user will find a library of **customisable questions** relating to the Requisition Form, as well as a viewing pane, where we can view all questions from the library that are in use on the **current requisition form** (compare above and see below):

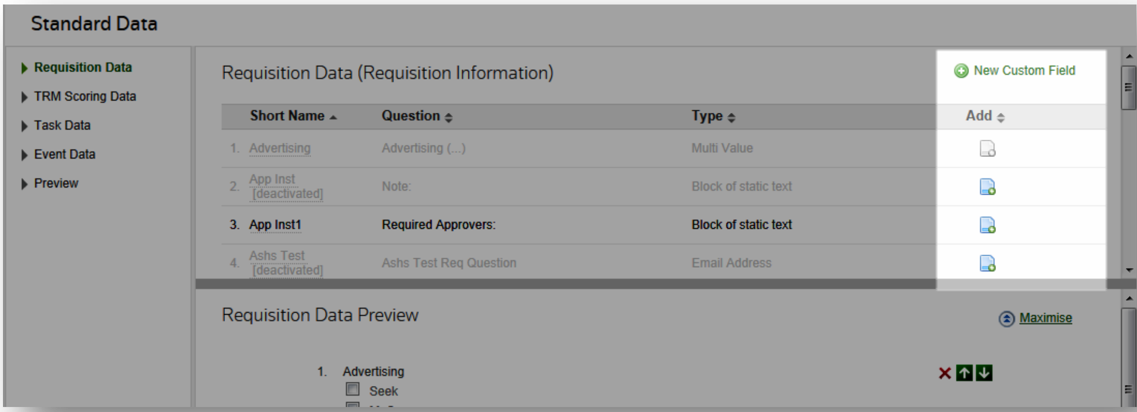


5.1.1.1. Editing the requisition form

- ✓ *The user can use the buttons in the Viewing Pane to reorder questions on the Requisition Form, or remove them:*



- ✓ *The user can also choose to add new questions to the existing library and then add and arrange them on the form :*



5.1.2. TRM Scoring Data

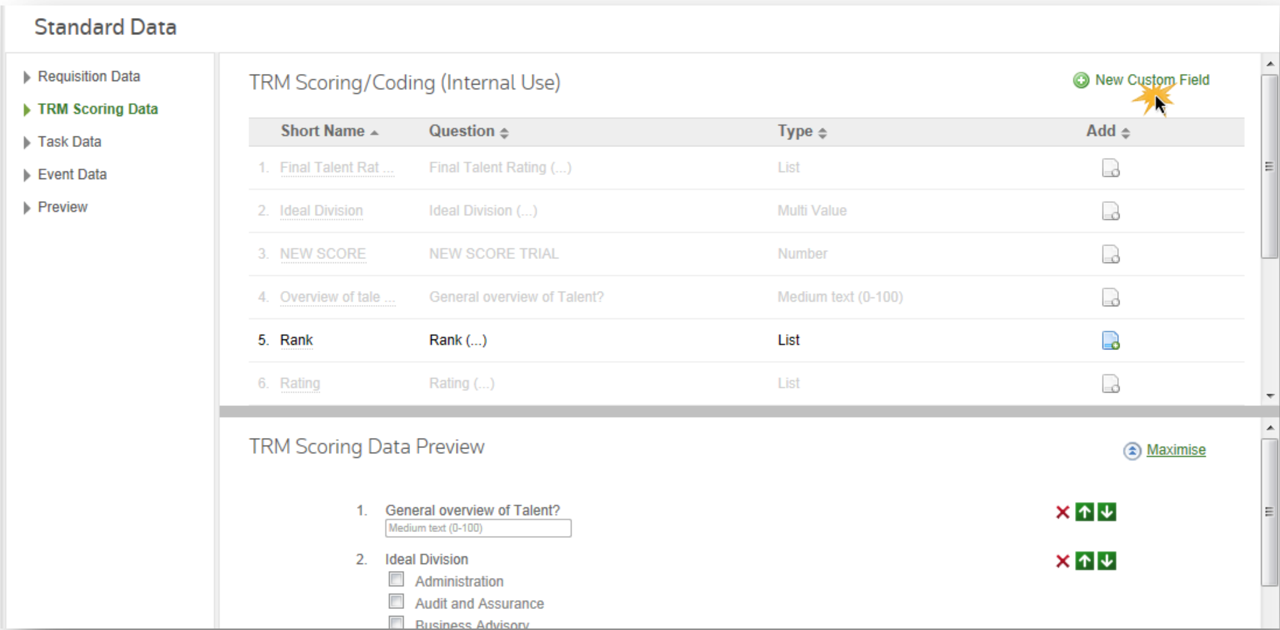
TRM refers to Talent Record Management. This is the permanent record saved in FSR for each and every candidate that comes into the system.

Any Custom Field that is added to the TRM Scoring Data becomes a scoring code that is applicable to all applications across all jobs in the firm. This can be used to assess candidates subjectively, and to screen unsuccessful and speculative applications.

For more information on Scoring, refer to the cvmail Quick Guide “Notes & Talent Coding”.

5.1.2.1. Adding a TRM Scoring Code

Navigate to the TRM Scoring data section and select “New Custom Field” from the top left hand corner of screen. Follow the prompts.



5.1.2.2. TRM Scoring Code examples

1. Talent Rating:

A - Star candidate
B - Has potential
C - Undetermined
D - Hired Candidate
Z - Unsuitable

2. Hired Candidate

Yes No

Please provide details

Details - not required

1. Field Rating

Hired
Is Not suitable
Do NOT Hire
Added to job
Store Manager
2IC / ASM
Part timer / casual
Full timer
Regional Manager / DM / RSO

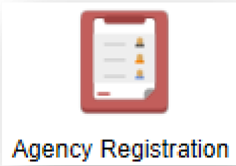
6. Willing to Relocate

Yes No

CHAPTER 6 AGENCY REGISTRATION

6.1 OVERVIEW

This section of Firm Administration contains the data that FSR users will utilise to accept, rank and categorise Agencies that wish to register on the firm job board, in order to submit candidates.



All Agencies must first register on the job board of the firm in question, before they are able to submit candidates.

The FSR user has the ability to create a customised Agency Registration form here, which may contain forced-answer questions, agreement to terms and conditions, as well as uploads. The user can also set up coding and scoring, to assist in defining preferred and non-preferred Agencies.

> **Note**
> *With this module switched **on** any agency can create an account on your job board and submit registration with your firm. They cannot submit candidates unless you advertise jobs directly to them, however.*

The Agency registration section contains the following areas:

NAME	DESCRIPTION
Agency Questionnaire	A library of questions created by the user to use on the Agency Application form
Agency Codes	A library of codes created by the user to assist with Agency ranking
Registration Preview	Give a preview of the Agency Registration form and any coding rules that have been applied

6.1.1. Agency Questionnaire Setup

The process of setting up questions for the Agency Registration (questionnaire) is the same as the process for setting up a standard application form (see chapter 5).

Some recommended questions you may want to include are as follows:

- ✓ What does your agency specialise in? *(free text field or multi-value select)*
- ✓ Please indicate if you are able to find permanent or temporary staff or both? *(list)*
- ✓ Which locations do you service? *(multi-value list)*

- ✓ How do you assess candidates? *(free text field)*
- ✓ Do you have a contact within our organisation? If yes, who? *(2 free text fields)*
- ✓ What is your fee structure? *(free text, upload or list)*
- ✓ Please attach your current terms and conditions. *(upload field)*
- ✓ Please read and agree to our current terms and conditions. *(yes/no flag with link to document)*

Note

Remember to create the questions first, which will add them to the question library and then add them to the Agency registration form.

6.1.2. Agency Codes Setup

Agency coding is optional, and works the same way as applicant coding (see chapters 4 and 5). You can configure personalised codes to assist you in ranking and scoring preferred and non-preferred Agencies. There is no specific template to follow when creating scoring codes for Agency ranking – it is up to the user how they want to utilise this functionality.

Add a new Agency Scoring code either in the Question Library or Agency Registration section, and add it to your Agency Registration process in Agency Codes.

Some common examples are below:

1. [Required] Rating
   - ☐ A - Preferred
   - ☐ B - Occasional Use
   - ☐ Z - Do not use

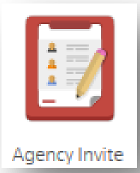
2. [Required] Candidates Supplied
   - ☐ Full-time
   - ☐ Part-time
   - ☐ Casual
   - ☐ Contract
   - ☐ Specialist
   - ☐ Graduate
   - ☐ Work Exp
   - ☐ Other

3. [Required] Locations Serviced
   - ☐ Melbourne
   - ☐ Sydney
   - ☐ Brisbane
   - ☐ Adelaide
   - ☐ Perth
   - ☐ Canberra
   - ☐ Hobart
   - ☐ Darwin
   - ☐ International
   - ☐ None of the above

CHAPTER 7 AGENCY INVITE

7.1 OVERVIEW

The Agency Invite functionality is contained with the System Administration area of cvMail FSR. It is a module that requires activation by the cvMail team, and is not contained within the standard FSR package.



Agency Invite is used primarily to allow organisations to 'invite' chosen agencies to register an account with their cvMail job board (and in doing so, enabling them to view and submit candidates to specified jobs. See *Quick Guide: Agency Publishing* for more information).

The functionality can also be used to communicate in bulk with known agents.

Note

Ensure you have this module activated by contacting the cvmail support desk.

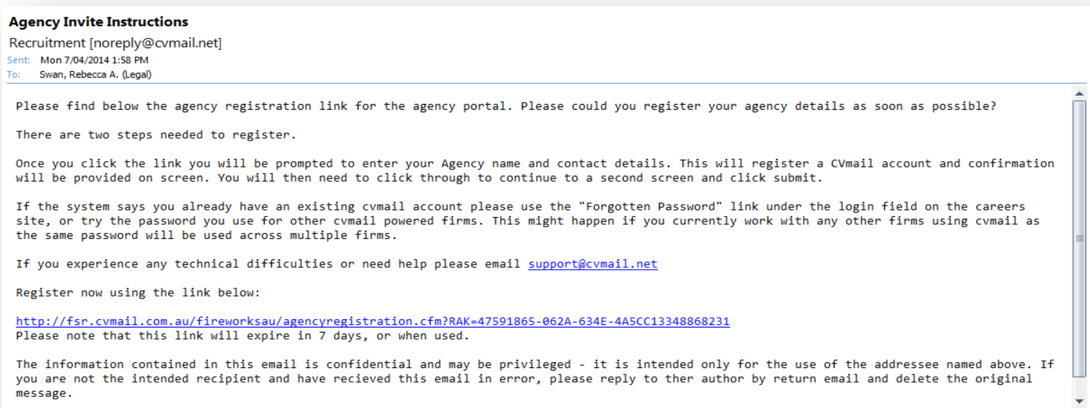
7.1.1. Using Agency Invite

1. *Click on the **Agency Invite** icon*
2. *A "**Select Email Template**" library will appear. If you have no existing templates, this library will be empty.*
3. *Select "**Agency Invite to Register**" (or your named Standard Template) template and click '**Next'***

Note

Templates can be created in the Message Template area of Firm Admin – the same way you create your Email Templates.

4. *The "**Write Email**" screen will appear, with the standard email template parameters visible*
5. *Complete all required fields*
6. *When you are happy with the format of your communication, click '**Send'**.*
7. *Invited agents will receive the email and be directed to your Agency Registration page when clicking on the link.*



Agency Invite Instructions
Recruitment [noreply@cvmail.net]
Sent: Mon 7/04/2014 1:58 PM
To: Swan, Rebecca A. (Legal)

Please find below the agency registration link for the agency portal. Please could you register your agency details as soon as possible?

There are two steps needed to register.

Once you click the link you will be prompted to enter your Agency name and contact details. This will register a CVmail account and confirmation will be provided on screen. You will then need to click through to continue to a second screen and click submit.

If the system says you already have an existing cvmail account please use the "Forgotten Password" link under the login field on the careers site, or try the password you use for other cvmail powered firms. This might happen if you currently work with any other firms using cvmail as the same password will be used across multiple firms.

If you experience any technical difficulties or need help please email support@cvmail.net

Register now using the link below:

http://fsr.cvmail.com.au/fireworksau/agencyregistration.cfm?RAK=47591865-062A-634E-4A5CC13348868231
Please note that this link will expire in 7 days, or when used.

The information contained in this email is confidential and may be privileged - it is intended only for the use of the addressee named above. If you are not the intended recipient and have recieved this email in error, please reply to ther author by return email and delete the original message.

CHAPTER 8 MAIL MERGE TEMPLATES

8.1 OVERVIEW

A Mail Merge Template is used to quickly generate many documents with certain fields such as names and addresses, personalised to a particular candidate.

For example, when offering multiple candidates a position, a template letter of offer can be created which is used to generate the actual documents. You can then select all the candidates you are offering a position to and the system will generate a copy of the offer letter for each person, complete with their name and address and relevant details.

Note

Most mail merge templates are created and added during the cvmail implementation process.

8.1.1. Creating a Mail Merge Template

Mail Merge Templates can be created in any word-processor that allows saving. For example; *RTF (Rich Text Format) files. Microsoft WordPad (included with Microsoft Windows) and Microsoft Word (included with Microsoft Office).*

Create the template document as a standard document for a particular candidate, and replace all instances of individual Talent information with the respective *System Defined Fields* from the table **below**. In each generated document, FSR will substitute each *'field'* with the appropriate information.

Description	System Defined Field
First Name	<<SYS_CAND_FIRST_NAME>>
Middle Initial	<<SYS_CAND_MIDDLE_INITIAL>>
Last Name	<<SYS_CAND_LAST_NAME>>
Title (Mr., Mrs., Ms., etc)	<<SYS_CAND_TITLE>>
E-Mail Address	<<SYS_CAND_EMAIL>>
Secondary E-Mail Address	<<SYS_CAND_SEC_EMAIL>>
Primary Address	<<SYS_CAND_ADDRESS_1>>
Secondary Address	<<SYS_CAND_ADDRESS_2>>
Suburb	<<SYS_CAND_SUBURB>>
State	<<SYS_CAND_STATE>>
Postcode	<<SYS_CAND_POSTCODE>>
Country	<<SYS_CAND_COUNTRY>>
Job Title	<<SYS_JOB_TITLE>>
Sender Full Name	<<SYS_SENDER_FULL_NAME>>
Sender Title	<<SYS_SENDER_TITLE>>
Sender First Name	<<SYS_SENDER_FIRST_NAME>>
Sender Last Name	<<SYS_SENDER_LAST_NAME>>
Sender Email	<<SYS_SENDER_EMAIL>>
Sender Phone	<<SYS_SENDER_PHONE>>
Current Time	<<SYS_CURRENT_TIME>>
Current Date	<<SYS_CURRENT_DATE>>

8.1.1.1. Example Template Document

<<SYS_CURRENT_DATE>>

<<SYS_CAND_TITLE>> <<SYS_CAND_FIRST_NAME>>
<<SYS_CAND_LAST_NAME>>
<<SYS_CAND_ADDRESS_1>>
<<SYS_CAND_SUBURB>> <<SYS_CAND_STATE>> <<SYS_CAND_POSTCODE>>

Dear <<SYS_CAND_FIRST_NAME>>,

We are delighted to offer you employment in the position of <<SYS_JOB_TITLE>>.

The terms and conditions, as we briefly discussed, are set out in the attached contract of employment. If you have any queries about these please do not hesitate to contact me on <<SYS_SENDER_PHONE>>.

If you have specific queries you may wish to seek your own legal advice.

Please review this offer of employment, sign the note of acceptance and return them to my attention.

An additional copy of the contract is enclosed for your retention.

We look forward to welcoming you on <<START_DATE>>.

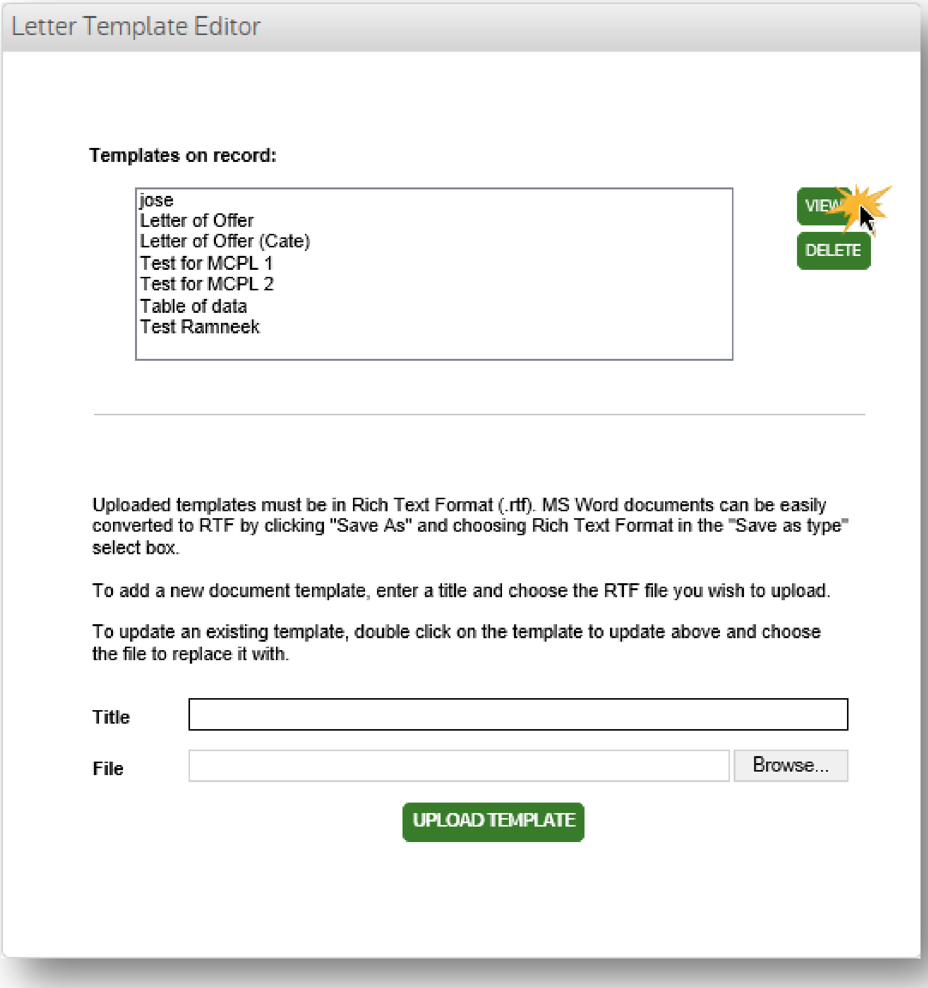
Yours sincerely,

<<SYS_SENDER_FIRST_NAME>> <<SYS_SENDER_LAST_NAME>>
<<SYS_SENDER_TITLE>>

Note

When saving this document it is important to remember to save it as .rtf (rich text format).

After uploading a template in Firm **Admin > Mail Merge Templates**, always (select it and) click **'View'**. Verify that the system has recognised all of the 'fields' that have been entered. Check that all the System Defined Fields appear in the 'System known custom fields' column, and that all of the User Defined Fields appear in the 'User custom fields' column.



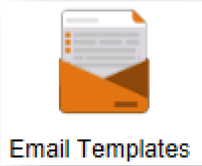
8.1.2. Uploading a Mail Merge Template

As seen above, the upper section displays a list of the existing (already uploaded) templates, and the lower section is used to upload new templates.

- ✓ *To upload a template that has been created, click the **'Browse**...' button.*
- ✓ *On the subsequent file selection screen, choose the desired template document file, and click the **'Open'** button.*
- ✓ *Type a title for this template, and click the **'Upload Template'** button. If the file is uploaded successfully, its title will appear in the 'Templates on record' list.*

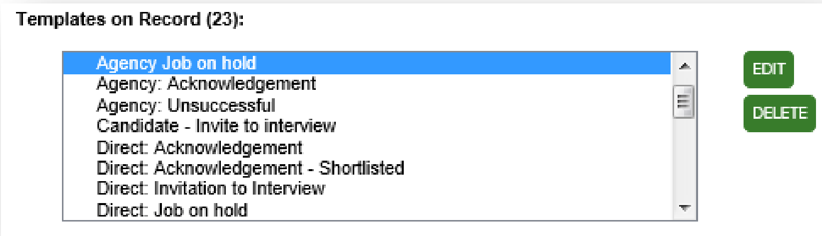
CHAPTER 9 EMAIL TEMPLATES

9.1 OVERVIEW



The **Email Templates** section of Firm Administration contains a library of pre-defined emails that can be used within the system.

These templates can be called up when send an email out from the FSR system, and used as a **default** or further edited before sending. All templates are fully **editable** at any time.

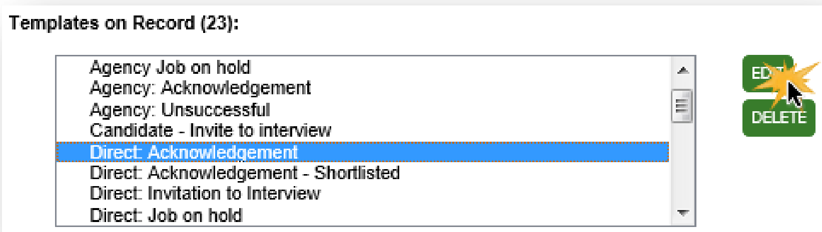


9.1.1. Email Templates – Uses

- ✓ *Contacting candidates **directly***
- ✓ *Contacting candidates **automatically** (as the result of an automated email set up: see chapter 2)*
- ✓ *Contacting **Agents** directly & automatically*
- ✓ ***Forwarding** candidates*
- ✓ *Inviting candidates to **Interview***
- ✓ *Inviting **Interviewers** to Interview*

9.1.1.1. Viewing & editing email templates

You can view all aspects of an email template by clicking on the template choice in the library list, and clicking "**edit**".



- ✓ Make your changes and click "**update**"
- ✓ To exit this view without saving any changes, click "**cancel**"

9.1.1.2. Creating a new email template

Each email will be structured around a basic template – each with slightly different features depending on the type of email required.

Below the email templates library list, you will see the Add Template area. First, you will need to choose your email template type

Template Type	Description
Standard Notify Email	Standard email template consisting of Name, Reply To, Subject, Template Body and Signature
Application – Email Forwarding	Same as above, but has the option to append candidates name/job title to the email subject
Reference Request Notify Email	Same as standard, with the added functionality of candidate's details automatically inserted in between two message body paragraphs.
Agency Notify Email	Same as standard, with the added functionality of candidate's details automatically inserted in between two message body paragraphs. Specifically used for communication with Agencies.
Data Expiry Email	Used to communicate with candidates, whose records have or are due to exceed your firm's data retention policy timeframe. Contains a link to allow candidates to approve the expiry or extend their retention time.
Candidate – Invitation to Interview Notification	Contains template body and footer, as well as an automated insert with a link to interview time selection & instructions for candidates.
Candidate – Allocated Interview Time Notification	Contains template body and footer, as well as an automated insert with a link to interview times & instructions for candidates.
Interviewer – Invitation to Interview Notification	Contains template body and footer, as well as an automated insert with a link to interview time selection & instructions for interviewers.
Interviewer – Allocated Interview Time Notification	Contains template body and footer, as well as an automated insert with a link to interview times & instructions for interviewers.
Online Assessment Request	Test URL and Date of Expiry are shown, between message body and signature

Note

Email template 'types' can only be used where they are relevant. For example, when sending a data expiry notification to a candidate, only the templates created using the 'data expiry email' template will appear for selection.

CHAPTER 10 EMAIL SETTINGS

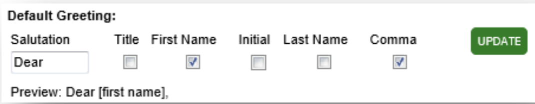
10.1 OVERVIEW

In this section of Firm Administration, the user can setup various aspects of system email details as defaults. Remember to click the “update” button for each individual section that you change

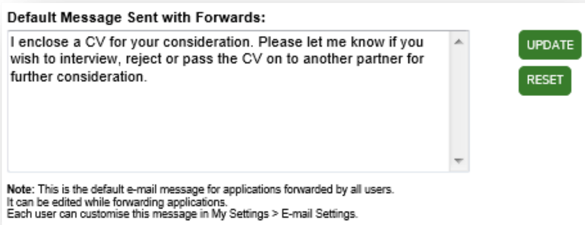
10.1.1. Customisable Email Settings

These include:

- ✓ *Default greeting:*

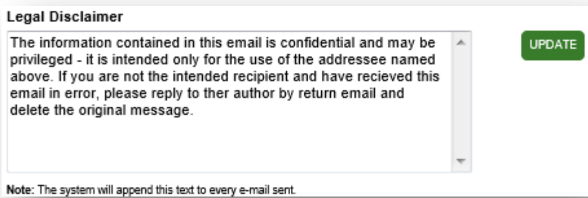


- ✓ *Default message sent with forwards*



- ✓ *Default return address on forwards*

- ✓ *Legal Disclaimer*



Note

Be aware that some of the email defaults set up in this section will only take effect if you choose 'use system defaults' in My Settings/Email Settings and do not use an email template.

CHAPTER 11 ADDRESS BOOK

11.1 OVERVIEW

The Address Book section of Firm Administration contains a list of all independent contacts within the system. These can be edited at any time by the user (restricted only by user security).

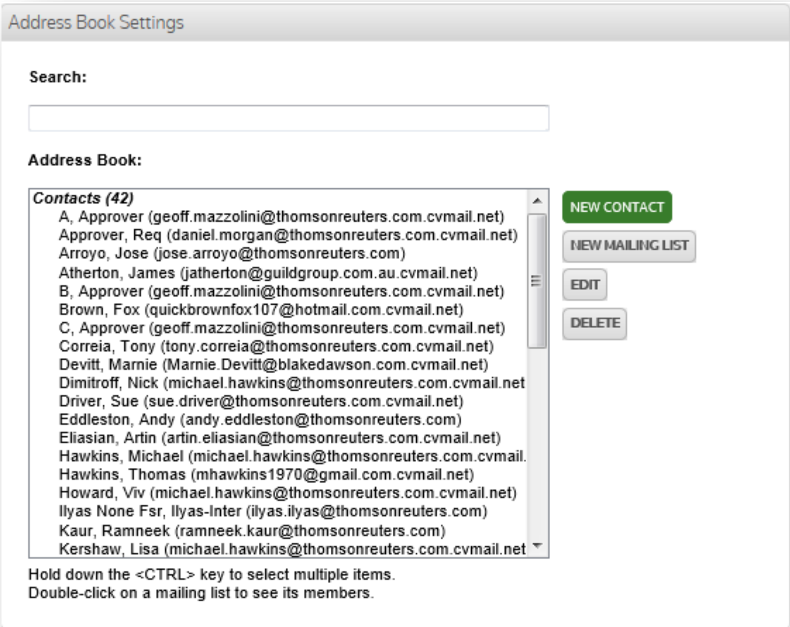
11.1.1. Address Book Functions

As well as keeping a record of independent contacts, the Address Book allows the user to create and manage Mailing Lists – the most common of these being a list of Approvers (refer to FSR Quick Guide: Multi Level Approval) and Interviewers (refer to FSR Guide: Interview Scheduler).

These two mailing lists are system generated – therefore, users can add and remove contacts to and from the lists, however they cannot remove the list itself.

The user can create other mailing lists of their own design; however they will not have any other link-effect through the system.

The address book also has a search function.



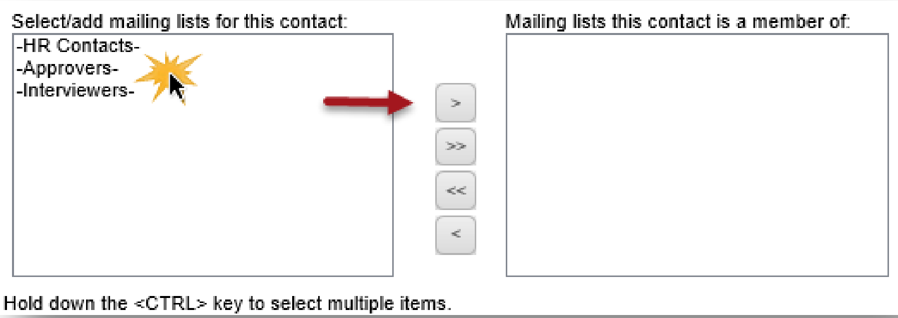
11.1.1.1. Adding and removing contacts

To add a contact:

- ✓ *Click "New Contact"*
- ✓ *Insert all required data – email address, plus optional data – title, and names.*

Choose a **Mailing List** to add the new contact to (optional):

- ✓ *Select the mailing list,*
- ✓ *Click the **arrow** to move the list across to the right hand box*



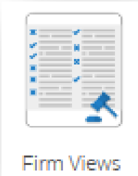
- ✓ Click "**Save**".

11.1.1.2. Creating a new mailing list

- ✓ *Click "New Mailing List*
- ✓ *Give the mailing list a name*
- ✓ *Select contacts to add to the mailing list*
- ✓ *Click "Save".*

CHAPTER 12 FIRM VIEWS EDITOR

12.1 OVERVIEW



Throughout FSR, users can "view" lists of information in "grids" of columns and lines of data. These include, list of job, lists of candidates and lists of agencies.

In this section of Firm Administration, users can create and customise their own views for these particular areas. For more detailed information regarding "Views" and their creation, refer to FSR Quick Guide – Views.

12.1.1. FSR views

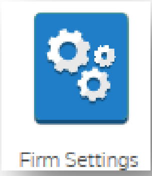
View Type	Description
Application Views	Views created here will be applicable to lists of candidates within jobs
Talent Builder Views	Create a view here, to apply to Talent Search results grid views. ***Note:*** *Do not confuse this grid area with applicant views within Jobs.*
Agencies Views	Views created here will apply to your grid view of Agencies. Use these to assist in grouping and providing Agency details.
Job Match Views	This area relates to your Job Match list of jobs. ***Note:*** *does not affect lists of candidates within Job Match. See Application Views.*
Req Approval Views	Create views for your list of requisitions awaiting approval
Job Setup Views	Create views for your list of jobs awaiting setup
Active Jobs Views	Create views for your list of Active Jobs – a very important section of the system. You can bring up all data directly relating to a current job in an Active Job view.
Finalised Jobs Views	Create views for your list of Finalised Jobs.
Archived Jobs Views	Create views for your list of Archived Jobs – a great historical reporting option
Suspended Jobs Views	Create views for your list of Suspended Jobs

12.1.2. Things to remember when creating Views

- ✓ *Create your view for the correct area – if you create a customised view in Active Jobs, you will not be able to call this view up when you are inside a job and viewing a list of Applications.*
- ✓ *When choosing your data columns -if you hover your mouse over the question text, they system will give you further detail on that piece of data. Handy when choosing data columns that refer to custom questions.*
- ✓ *Select the data columns you think you need* -save your View, and navigate to the system area that you have creating it for. Check that you have the right data columns, and return to Firm Views Editor to refine your view if need be.

CHAPTER 13 FIRM SETTINGS

13.1 OVERVIEW



Firm Settings contains two basic pieces of information for the user to edit. The Intranet password and the firm Privacy/Data Protection Compliance. Any changes made here will affect the system firm wide.

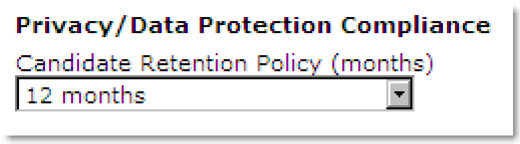
13.1.1. Intranet Password

When internal candidates log on to the firm Job Board, they must register and create an account, in order to apply for vacancies.

If they wish to view any jobs published only to internal candidates, they must click on “Intranet” and enter the password that is listed in this section of Firm Administration.

The Intranet password listed here can be updated by the FSR user at any time – remember to notify your internal staff of any changes.

13.1.2. Privacy/Data Protection Compliance



All candidate applications that come into the firm database are saved on the system, within Talent Builder.

The Privacy/Data Protection Compliance date set in this section, will define how long these candidates can sit on the database before their data retention period expires.

There is no automated deletion of candidates, nor any automated email notification of data expiry that is sent at the time of expiry. This is a fully manual process.

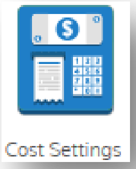
Set your date according to your firm guidelines.

Note

Refer to the Quick Guide: Talent Builder for more information regarding how to view these flags.

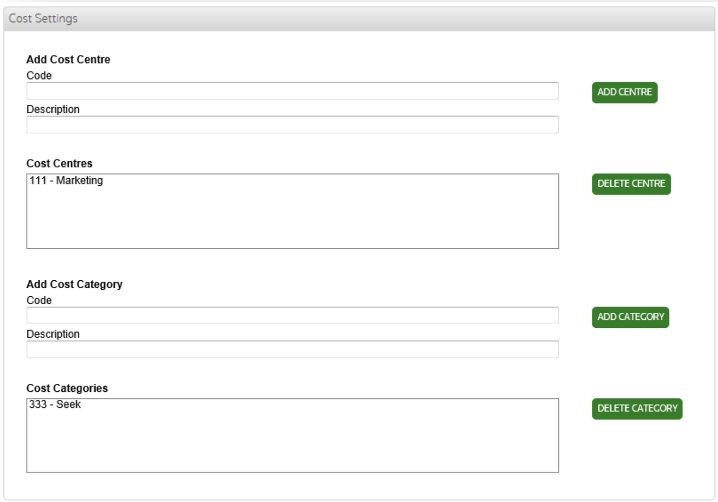
CHAPTER 14 COST SETTINGS

14.1 OVERVIEW



In this section, users can create/delete **cost centres** and **categories** that regularly contribute to recruitment costs. Cost Centres and Cost Codes are defined as per your *firm guidelines*.

Normally, this section is set up by the cvmail team upon system implementation, but can be edited by the user at any time.



14.1.1. Adding a Cost Centre

- ✓ *Enter your **cost centre code***
- ✓ *Enter a **description** for your cost centre*
- ✓ *Click **Add Centre**...*

14.1.2. Adding a Cost Category

- ✓ *Enter your **cost category code***
- ✓ *Enter a **description** for your cost category*
- ✓ *Click **Add Category**.*

CHAPTER 15 JOB SETTINGS

15.1 OVERVIEW

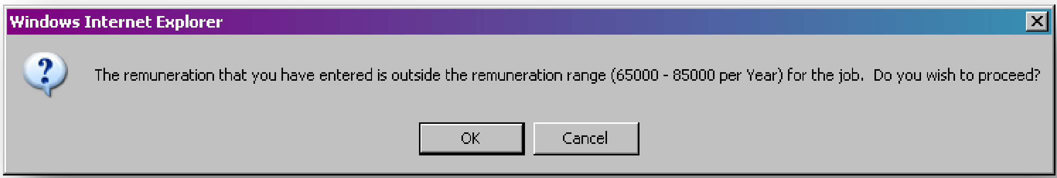
In this section of Firm Administration, users can configure settings relating directly to the **management** of **jobs**. This includes:

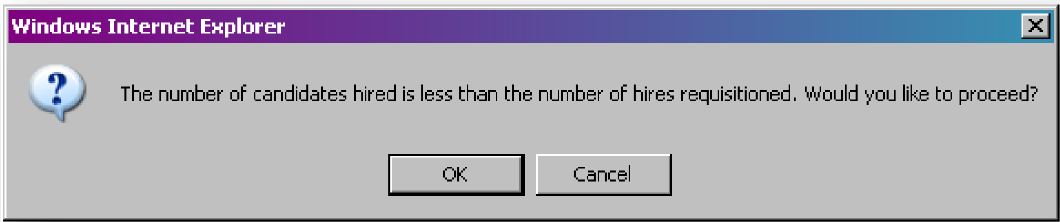
- ✓ *Reason library for **Delayed Jobs***
- ✓ *Reason library for **Suspended Jobs***
- ✓ ***Job Warning** settings*

15.1.1. Job Warning Settings

The user can manage a selection of warnings to display when in the process of finalising a job. Simply check or uncheck the boxes next to each warning option to activate or deactivate.

Warnings will display as pop-up boxes as per the below:





15.1.2. Job Suspend Reasons

When an Active job needs to be **suspended**, the user is prompted to select a reason for suspension (for reporting purposes). In Job Settings, the user can create/delete/manage these reasons.

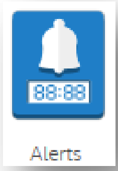
15.1.3. Job Delay Reasons

Within the Job Setup section, the user has the ability to enter **notes** if the job is delayed for any reason. In this section, the user can select a predefined Reason for Delay, and then add free-text comments.

In Job Settings, the user can create/delete/manage these reasons.

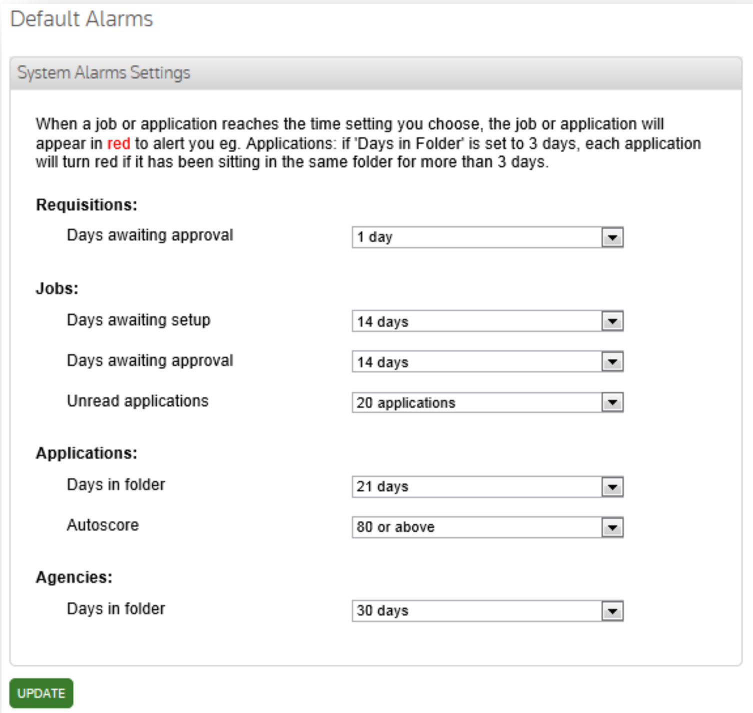
CHAPTER 16 ALERTS

16.1 OVERVIEW



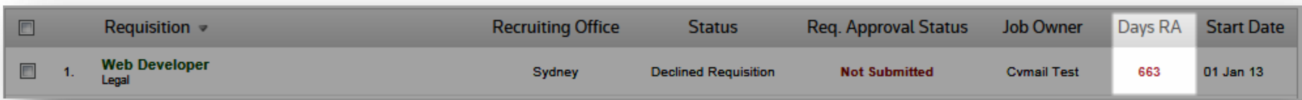
This section of Firm Administration contains functionality that allows the user to customise time periods relating to active Requisitions and Jobs.

The user can be alerted to incidents of requisitions, jobs, and applications etc. that are proceeding too slowly through the intended workflow.



16.1.1. Default Alarms in Action

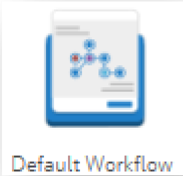
Choose your selected time ranges for each alert. When data falls outside the timeframes that the user has specified, the data will appear **bold** and in **red**:



		Requisition	Recruiting Office	Status	Req. Approval Status	Job Owner	Days RA	Start Date
	1.	**Web Developer** Legal	Sydney	Declined Requisition	**Not Submitted**	Cvmail Test	663	01 Jan 13

CHAPTER 17 DEFAULT WORKFLOW

17.1 OVERVIEW



In this section, the user can configure a standard application workflow (set of folders) that will appear as a default whenever creating a new vacancy from scratch (i.e.: not using a template).

Typically, this default section of the system is setup by the cvmail team during the implementation process. However, it can be edited at any time by the user.

17.1.1. Default Workflow functionality

Within the Default Workflow the user cannot:

- X *Delete Base Folders (red) – however they can be disabled.*
- X *Create Base Folders (red) – this task must be requested of the cvmail Support team.*

The user can:

- ✓ *Create new Custom Parent folders (yellow)*
- ✓ *Create new Custom Sub-folders (yellow)*

For more information regarding the Default Workflow, refer to the **FSR Quick Guide – Application Workflow**.

CHAPTER 18 SECURITY SETTINGS

18.1 OVERVIEW

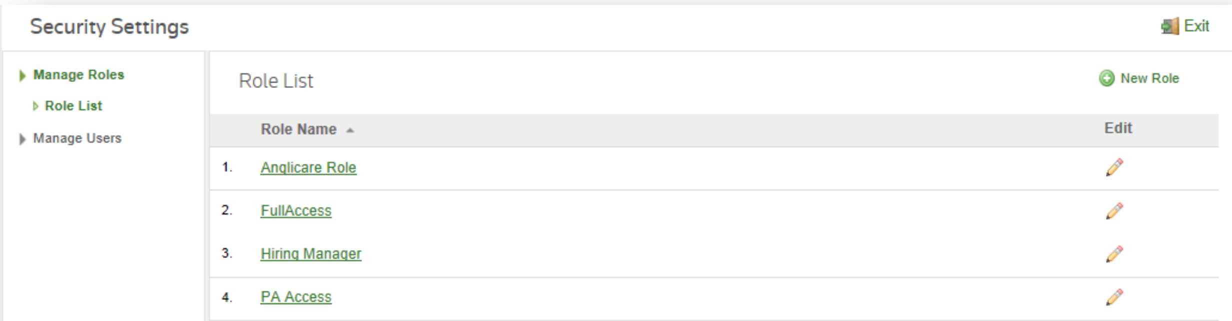
Within this area of Firm Administration, you will find your system User List, as well as security defined User Roles. You can manage users and user roles within this area of cvmail.

Information contained within this area includes:

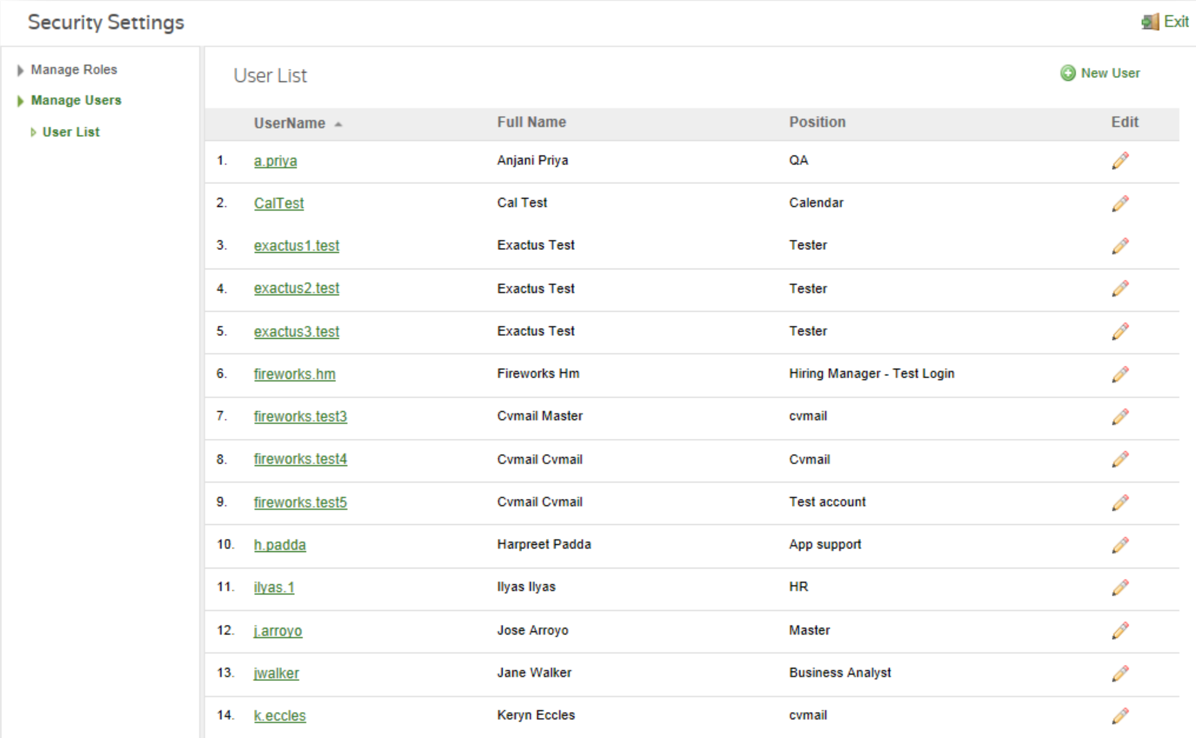
- ✓ *Usernames*
- ✓ *User information*
- ✓ *Position titles*
- ✓ *Email addresses*
- ✓ *Default currency*
- ✓ *Security Access Settings*

> **Note**
> *Access to the security settings area is limited to your personal cvmail access. You may not be authorised to view this area.*

18.1.1. Example Role List



18.1.2. Example User List



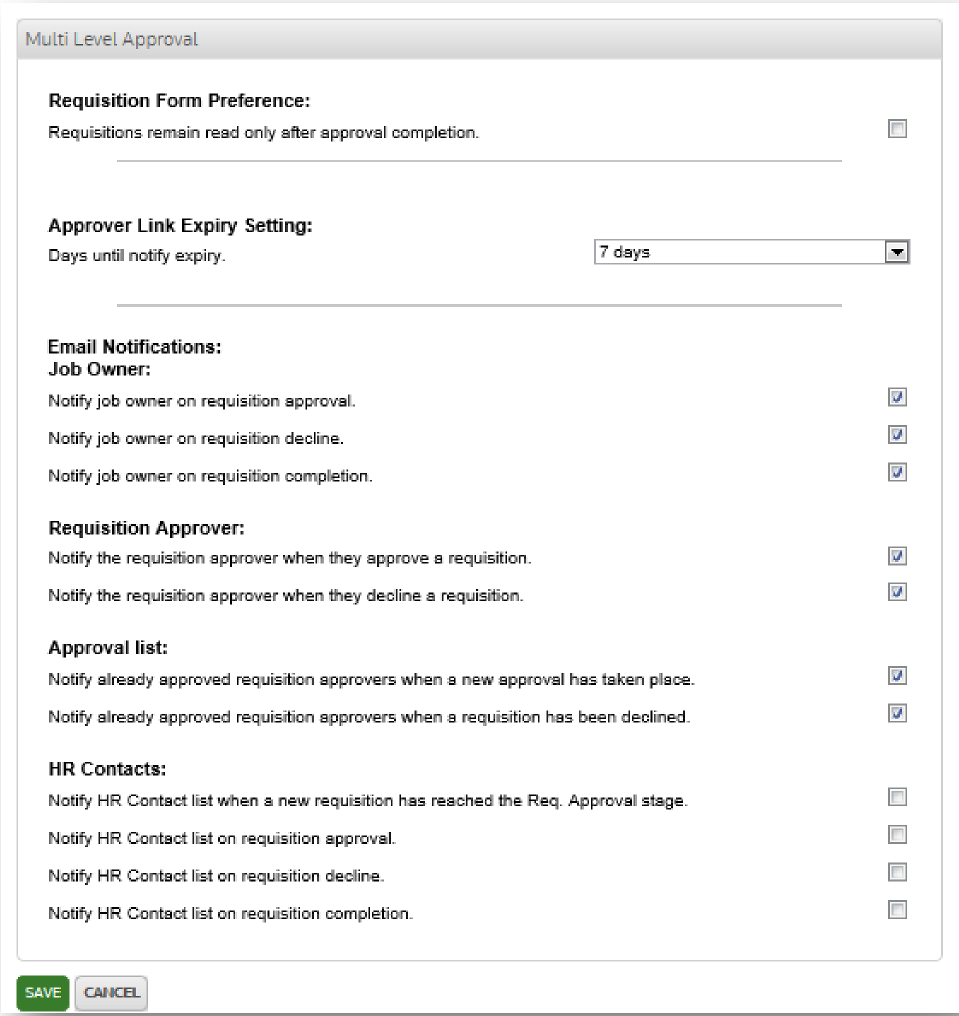
If you wish to edit in this area, please contact cvmail support.

CHAPTER 19 MULTI LEVEL APPROVAL

19.1 OVERVIEW

The Multi Level Approval section in Firm Administration will only be available if you have the Approvals module switched on for your firm.

In this area, you have several settings you can choose to use within the system. Simply check or uncheck the box next to each line of information, in order to apply that setting or switch it off.



19.2 PREFERENCES

19.2.1. Requisition Form Preference

Once a requisition form is completed and approved, the user has the option to make it read only after the fact, or remain editable.

19.2.2. Approver Link Expiry Setting

Here users can set the amount of time an approval link remains actionable. For example, if you are sending through Requisitions for approval, and you are not receiving responses fast enough, your link expiry time may be too short.

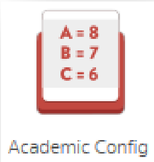
Standard setting is 2-3 days.

19.2.3. Email Notifications

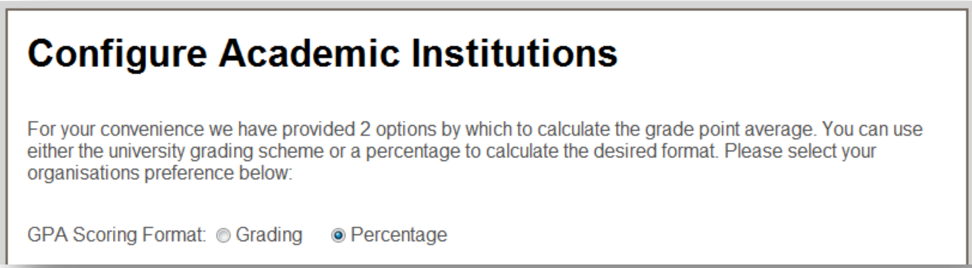
This area contains various settings around notifications to job owners and approvers

CHAPTER 20 ACADEMIC CONFIG

20.1 OVERVIEW



Choose your GPA scoring format. This choice will determine how GPA information is displayed within the applicant record. For example:



If the **Grading** format is chosen a numeric score will be assigned to each of a set of specific grades for each Academic Institution that may be chosen by the candidate when entering their tertiary education records.

To the right is an example of one of the supported grades for 'Australian National University' that will receive a GPA weighting of numeric score, and subsequently be included in a candidate's GPA.

GRADE	SCORE
HD	4
HD1	4
D	3
H2A	3
H2B	3
CR	2
H3	2
P	1
PS	1
HLP	1
N	0
NCN	0
WN	0

If the Percentage format is selected, a percentage score will be assigned to each of a set of specific Grade for each Academic Institution that may be chosen by the candidate when entering their records.

To the right is an example of one of the grades for 'Australian National University' that will receive a GPA weighting of percentage, and subsequently be included in a candidate's GPA.

GRADE	GRADE PERCENTAGE
HD	80%
HD1	80%
D	70%
H2A	70%
H2B	70%
CR	60%
H3	60%
P	50%
PS	50%
HLP	50%
N	0%
NCN	0%
WN	0%

20.1.1. Adjusting grade weighting

Choose the Universities you want to be available to your candidates for selection, but checking or un-checking the boxes.

1. *Select the universities you want to have available for your candidates to choose from when applying by ticking the checkboxes, and clicking 'Save"*

To submit a new university for consideration please email the cvMail Support Team - firmsupport@cvmail.net

Institution Name	Grades
☑ Auckland University of Technology	View Grades
☑ Australian Defence Force Academy	View Grades
☑ Australian National University	View Grades
☑ Avondale College	View Grades
☐ Bond University	
☐ Central Queensland University	
☐ Charles Sturt University	
☐ Christian Heritage College	

**Remember to click "Save".*

As the GPA is an average, a particular GPA can be adjusted from any range by clicking on 'View Grades'

2. *Choose the university you wish to adjust*
3. *Click on the relevant "View Grades" link*
4. *The following screen will appear:*

Grades for Institution: Auckland University of Technology

Below you have the ability to activate or deactivate a particular grade, this is done by simply un-checking the box in the 'Grade' column. You can also adjust the weighting of the grade score and grade percentage. If you do not wish to use the default scores provided by cvMail select the 'Customise' option below, this will allow you to edit the values under 'Grade Point' and 'Grade Percentage' columns. Once you've updated the desired weighting(s), ensure you click the 'Save' at the bottom of the page to retain your changes.

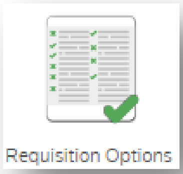
Weighting Configuration ◉ Use Defaults ○ Customise

To submit a new grade for consideration please email the cvMail Support Team - firmsupport@cvmail.net

Grade	Grade Point	Grade Percentage
☑ A+	Score: 9.00	Percentage: 80 %
☑ A	Score: 8.00	Percentage: 80 %
☑ A-	Score: 7.00	Percentage: 80 %
☑ B+	Score: 6.00	Percentage: 75 %
☑ B	Score: 5.00	Percentage: 70 %
☑ B-	Score: 4.00	Percentage: 65 %
☑ C+	Score: 3.00	Percentage: 60 %
☑ C	Score: 2.00	Percentage: 55 %
C-	Score: 1.00	Percentage: 50 %

CHAPTER 21 REQUISITION OPTIONS

21.1 OVERVIEW



This area is used to customise the upper fields on the requisition form – and is usually set up during implementation. Once set up this area should not need to be modified.

The upper fields in the requisition form can be modified to be:

- ✓ *Visible – will appear on the requisition form.*
- ✓ *Hidden – will not appear on the requisition form*
- ✓ *Mandatory – will appear on the requisition form and the user will be forced to complete the field*
- ✓ *Optional – will appear on the requisition form and the user will have the choice to either complete the field or skip it.*

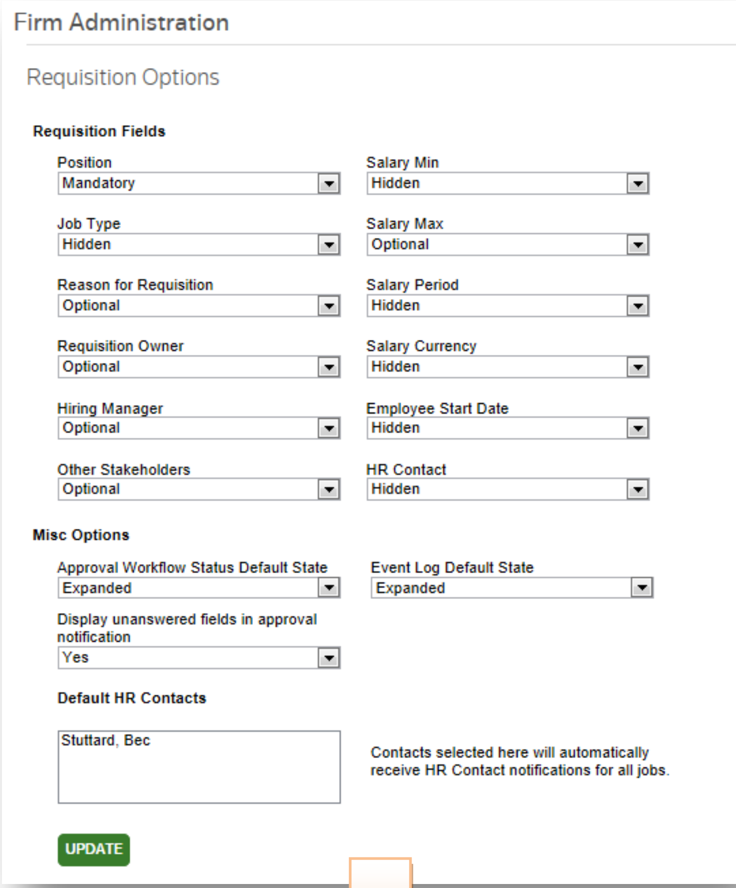
Other options include:

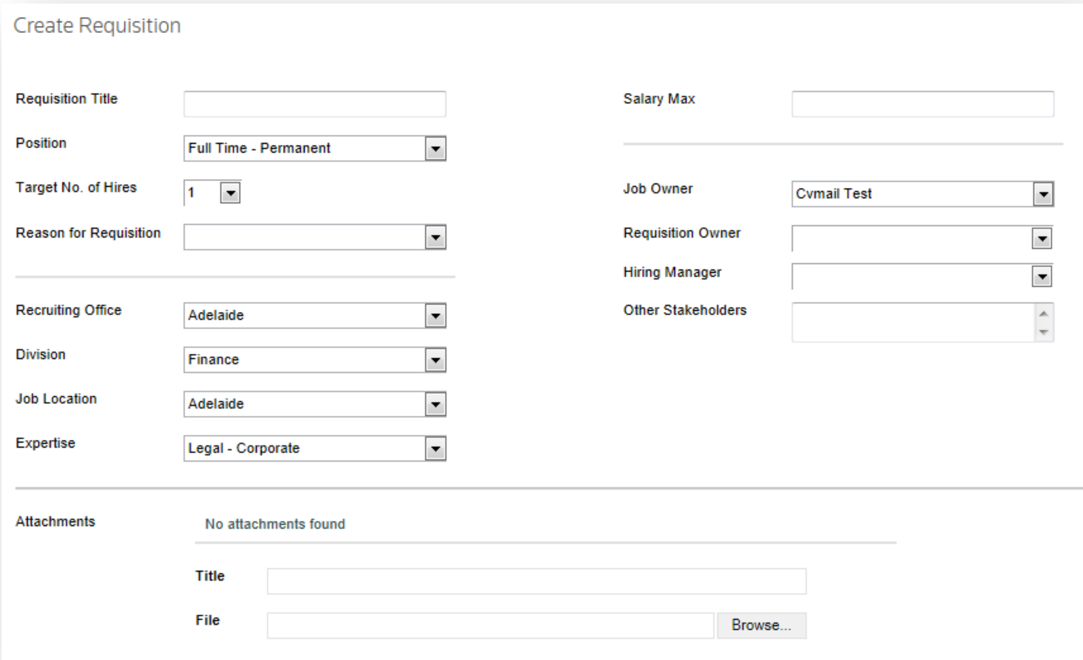
- *Expanding or collapsing the Approval Workflow Status log (only visible if you have the Approvals module)*
- *Expanding or collapsing the Event Log*
- *Choosing whether to display unanswered optional fields in the requisition form for approvers*
- *Default HR recipient contacts,*

Note

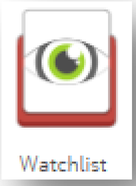
This area should be used with extreme caution. Any changes to the settings of the listed requisition fields will have a flow on effect to current and historical requisition forms.
For example; if you make your Job Type hidden, when the firm has always had it visible, when looking at historical jobs or running reports on requisition data – this field will disappear.

**The data will NOT be erased. It will simply be invisible.*


Firm Administration
Requisition Options
Requisition Fields
Position
Mandatory
Salary Min
Hidden
Job Type
Hidden
Salary Max
Optional
Reason for Requisition
Optional
Salary Period
Hidden
Requisition Owner
Optional
Salary Currency
Hidden
Hiring Manager
Optional
Employee Start Date
Hidden
Other Stakeholders
Optional
HR Contact
Hidden
Misc Options
Approval Workflow Status Default State
Expanded
Event Log Default State
Expanded
Display unanswered fields in approval notification
Yes
Default HR Contacts
Stuttard, Bec
Contacts selected here will automatically receive HR Contact notifications for all jobs.
UPDATE


Create Requisition
Requisition Title
Position
Full Time - Permanent
Target No. of Hires
1
Reason for Requisition
Recruiting Office
Adelaide
Division
Finance
Job Location
Adelaide
Expertise
Legal - Corporate
Salary Max
Job Owner
Cvmail Test
Requisition Owner
Hiring Manager
Other Stakeholders
Attachments
No attachments found
Title
File
Browse...

CHAPTER 22 WATCHLIST



22.1 OVERVIEW

The watchlist is used to flag candidates of importance. The functionality allows the user to place an alert on specified candidates as they enter the system. These could be referred candidates, candidates that have already been in contact with the firm – the choice is yours.

The system will display a visible flag to the user when a watch listed candidate enters the system, and will also send automatic email notifications (where enabled).

Note

Watchlist functionality is an enabled module. Please check your system specifications first to see if you have access to this module.

22.1.1. Setting a watch

1. *Log in to cvmail*
2. *Navigate to **Firm Administration***
3. *Click on the "watchlist" icon*
4. *You will be taken to the watchlist entry screen*
5. *Enter the first name, and the last name of the candidate you want to add, and click "Create Watch"*
6. *Once the watch has been created, the candidate name will appear in blue on the watch list:*

22.1.2. Setting notification emails

By default, simple notification emails will be sent out to the creator of the watch, via the email address associated with their cvmail login account.

This area can be modified by the user.

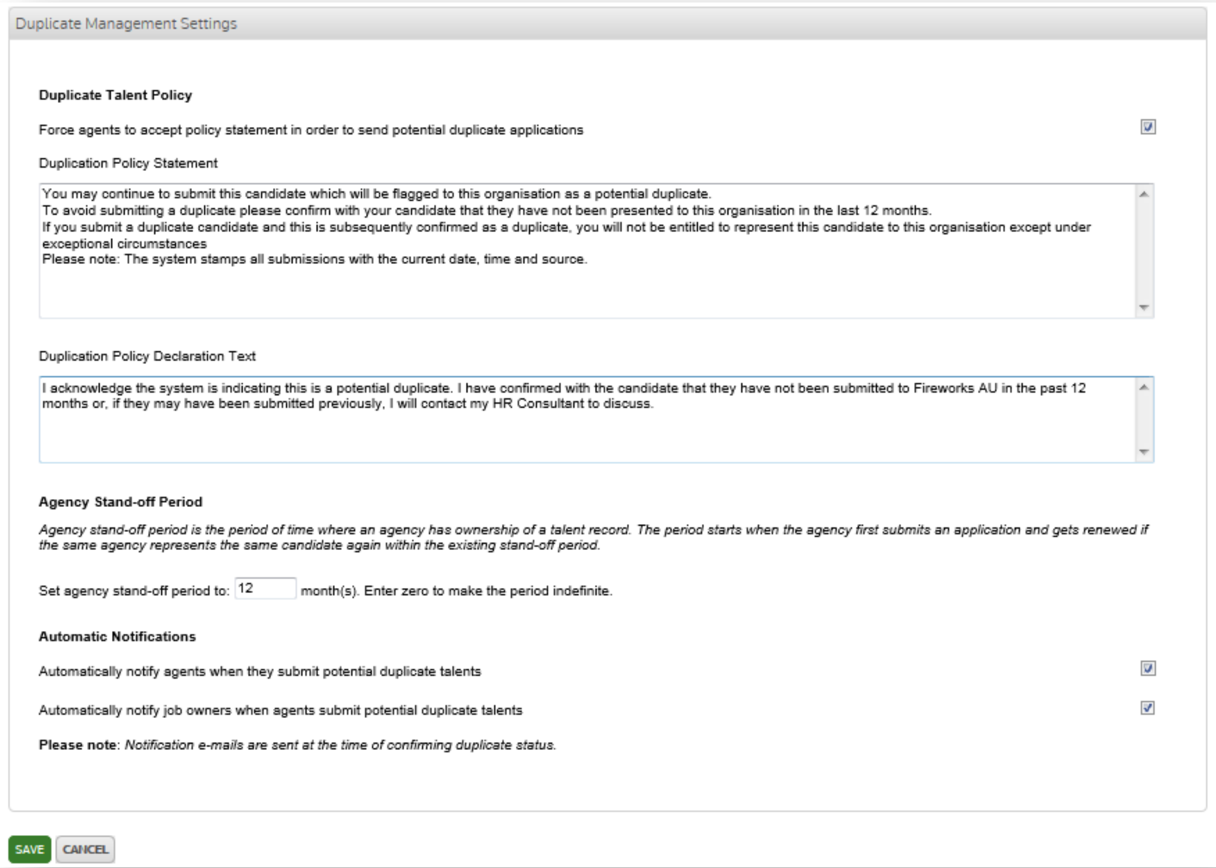
CHAPTER 23 DUPLICATE MANAGEMENT

23.1 OVERVIEW

In this area, the system captures a customisable "Duplicate Talent Policy" for your organisation. This policy targets Agencies and external Talent suppliers, and their ability to submit duplicate candidates.

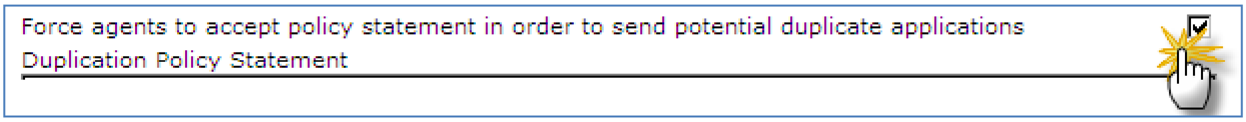
The area will capture:

- Duplicate Policy Statement, as well as Declaration Text
- An organisation-defined Agency Stand Off period
- Automated notifications to Agents and Job Owners



23.1.1. Optional Automations

You can force an Agent to agree to your Duplicate Policy when submitting candidates (and in the process, performing the required duplication check):



You can also modify your Auto Notifications: