



cvMail  
full spectrum  
recruitment (FSR)  
STANDARD USER GUIDE

e-Recruitment Solutions

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## REVISION HISTORY

Name	Date	Version	Summary of changes
Cate McNamara	14/08/09	V1.0	Document created
Rebecca Stuttard	04/04/11	V2.0	Document Modified
Rebecca Swan	05/02/14	V3.0	Document Updated

## ABOUT THIS DOCUMENT

### INTENDED READERSHIP

This guide is designed to assist with the navigation and use of cvmail FSR.

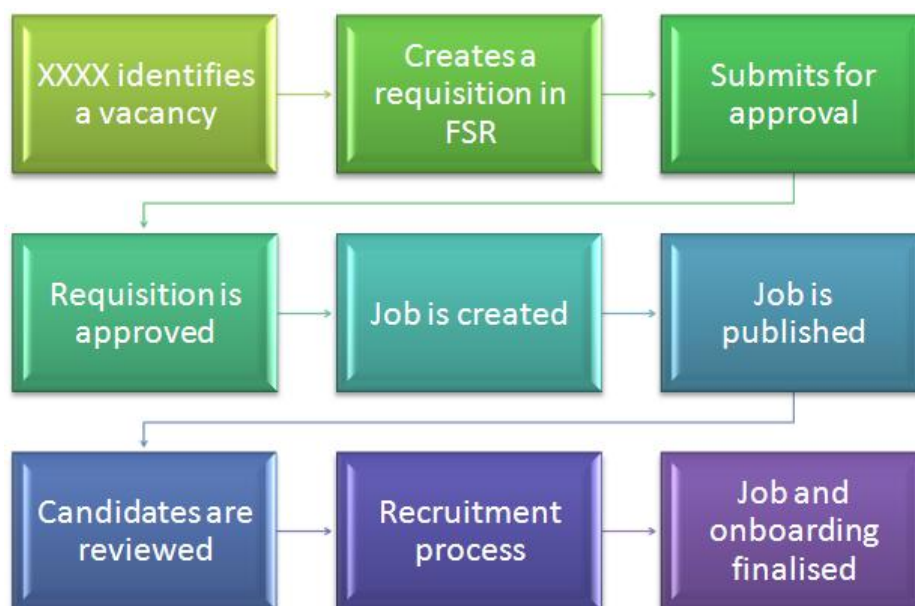
The level of security access assigned to a new user (client) can vary depending on the database setup; therefore this document *must be edited* to reflect the workflow of the organisation and the internal practices that must be followed.

### IN THIS GUIDE

This guide assumes that the Client user has security access to:

- *Edit My Settings and Firm Administration*
- *Create and submit a job requisition*
- *Approve requisitions*
- *Create jobs*
- *Edit all Job types*
- *Edit candidates*
- *Email candidates*
- *Move candidates through the recruitment workflow*

The diagram below depicts the typical workflow in cvmail FSR.



#### Note

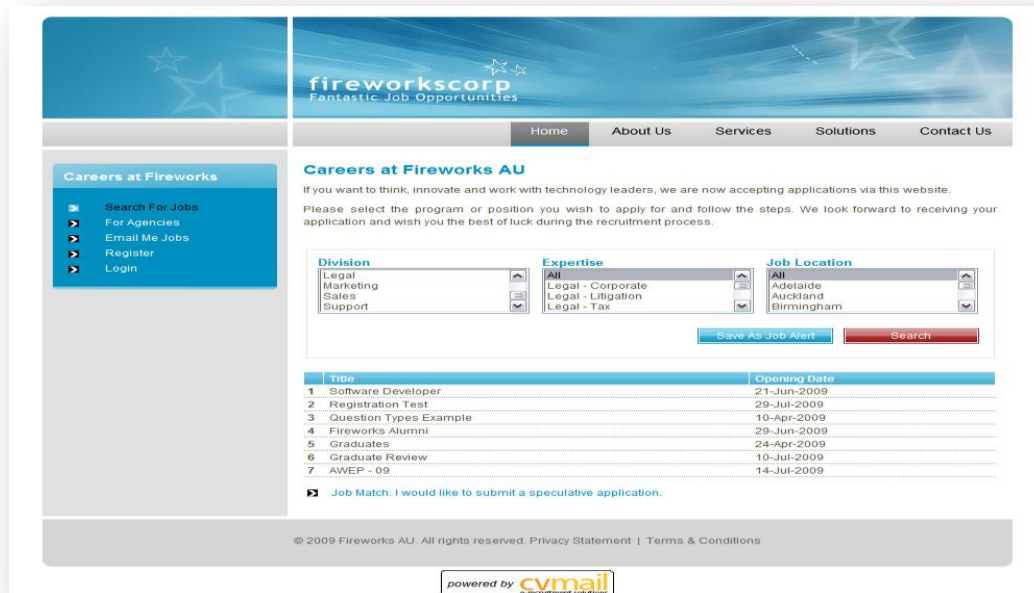
Contact your Client Services Consultant for more information regarding security setup in FSR.

## Chapter 1: WHAT IS FULL SPECTRUM RECRUITMENT (FSR)?

Full Spectrum Recruitment (FSR) consists of two separate areas.

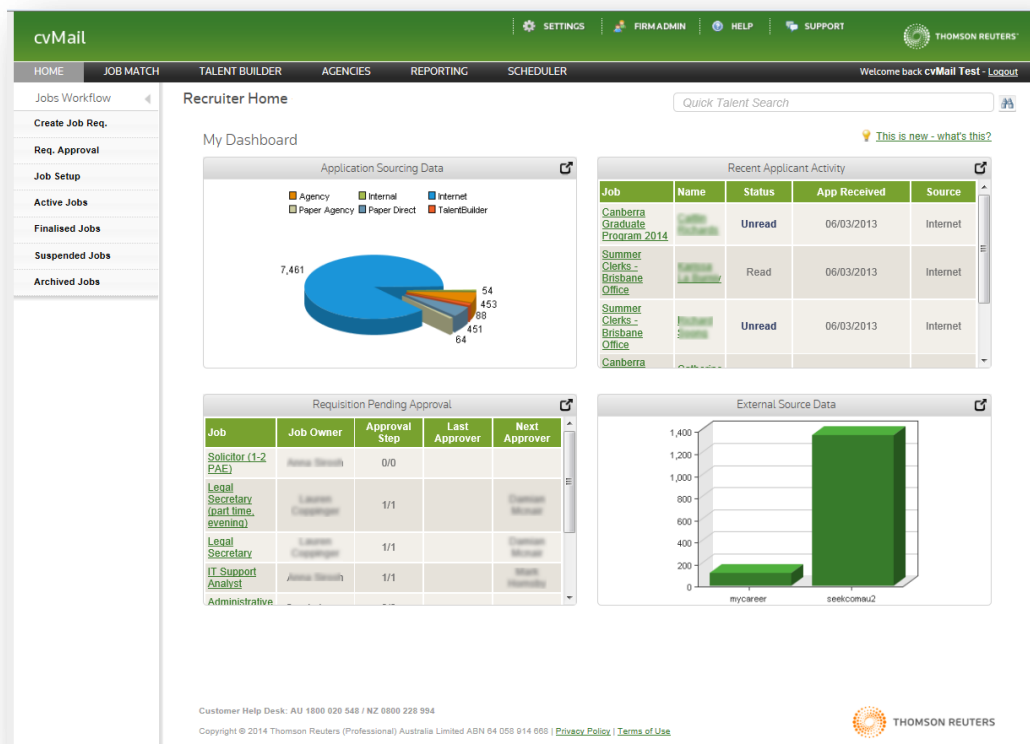
### 1. Job Board

The job board is an external webpage built by cvmail to match an organisation's website. It is linked to the 'Careers' page and used by candidates view and apply for jobs.



### 2. Recruiter Database (Home Screen)

The recruiter database is where all online applications are received, stored and managed. It can only be accessed by recruiters.



## Chapter 2: TERMINOLOGY GUIDE

The following table explains the most common terms used in this document.

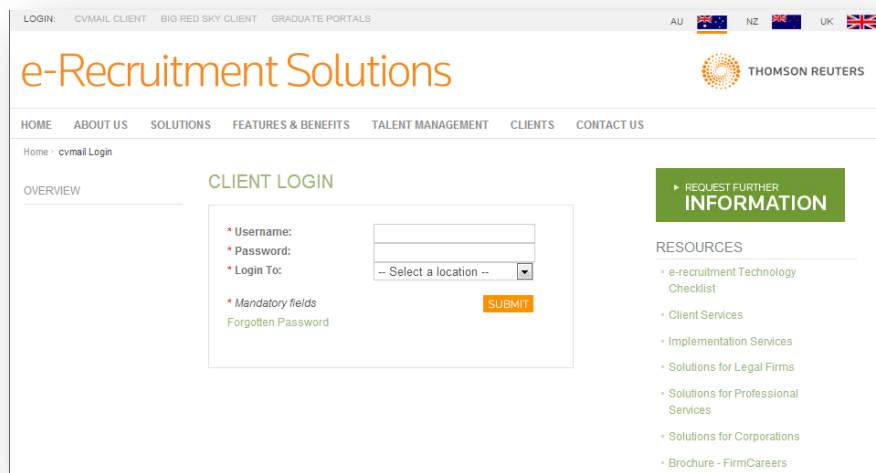
TERM	MEANING
<b>FSR</b>	Full Spectrum Recruitment
<b>Job Board</b>	An external webpage built by cvmail to match an organisation's website. It is linked to the 'Careers' page and used by candidates view and apply for jobs.
<b>Home Screen</b>	The FSR home page that contains commonly used areas for managing jobs.
<b>Jobs Workflow</b>	The menu listing containing the day to day jobs workflow.
<b>Dashboard</b>	Real time analytical reporting capability controlled by the user. Appears on login.
<b>Main Menus</b>	Contain other FSR modules as well as system and user settings and Help.
<b>Linear Menu</b>	A menu that appears vertically on the page.
<b>Requisition</b>	Requisitions are the starting point of every job in FSR.
<b>Multi Level Approval</b>	The module that allows for requisitions to be approved by multiple people who do not have to be FSR users.
<b>Interview Scheduler</b>	The module in FSR that manages the Interview process.
<b>Publishing</b>	The action that posts a job onto the Job Board.
<b>Views</b>	Provides the ability to select and apply relevant sets of information about a list of jobs, requisitions, applications, etc.
<b>Filters</b>	Enables the recruiter to quickly apply a temporary filter to see limited information such as jobs in Melbourne.
<b>Quick Talent Search</b>	A search facility that searches the candidates Talent record (as opposed to their Application record).
<b>Job Match</b>	The Job Match section contains speculative (non-existent) job positions for prospective applicants to submit their profiles, in order to be considered for similar upcoming vacancies.
<b>Talent Builder</b>	The Talent Builder section manages the firm's database of Talent Records.
<b>Talent Record</b>	A candidate's Talent Record is a collation of the information from all of their applications across various jobs with the company database.
<b>Question Library</b>	The Question Library manages the questions that are used in job application forms, Agency Registration Questionnaire and Job Requisitions.

## Chapter 3: HOW TO LOG INTO FSR

### 3.1 LOGGING IN

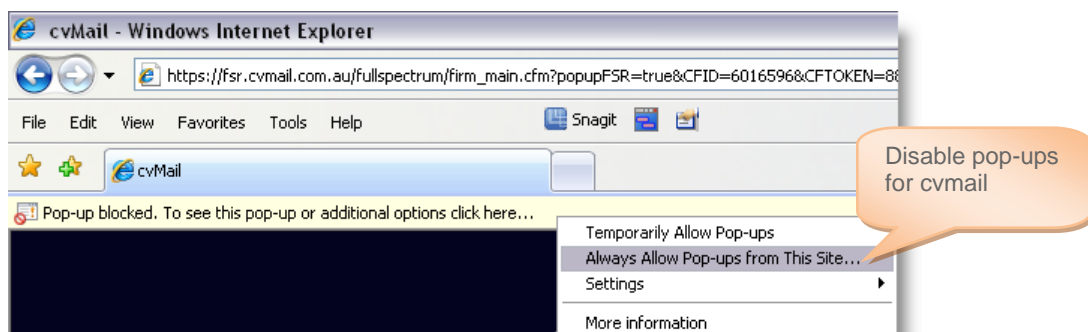
Full Spectrum Recruitment (FSR) is a web based application. Before you can log into FSR you must be created as a user within the application and have a username and password. Initially, this is completed by the cvmail support team.

1. To log in, navigate to <http://www.erecruitmentsolutions.com/cvmail-login>
2. Enter the **username** and **password** (supplied by HR)
3. Select the **AU Full Spectrum**
4. Click the **SUBMIT** button
5. FSR opens in a new window:



#### 3.1.1. Pop up windows

If your internet browser has pop-up windows blocked, the FSR window will not appear on your screen and instead you will see a dark blue cvmail window.



Single **right click** the message and select 'Always allow pop-ups from this site' to properly view the FSR window.



## Chapter 4: UNDERSTANDING FSR

### 4.1 NAVIGATING IN FSR

The Home screen is the 'home' page in FSR and is split into three areas:

**1. Main Menus**

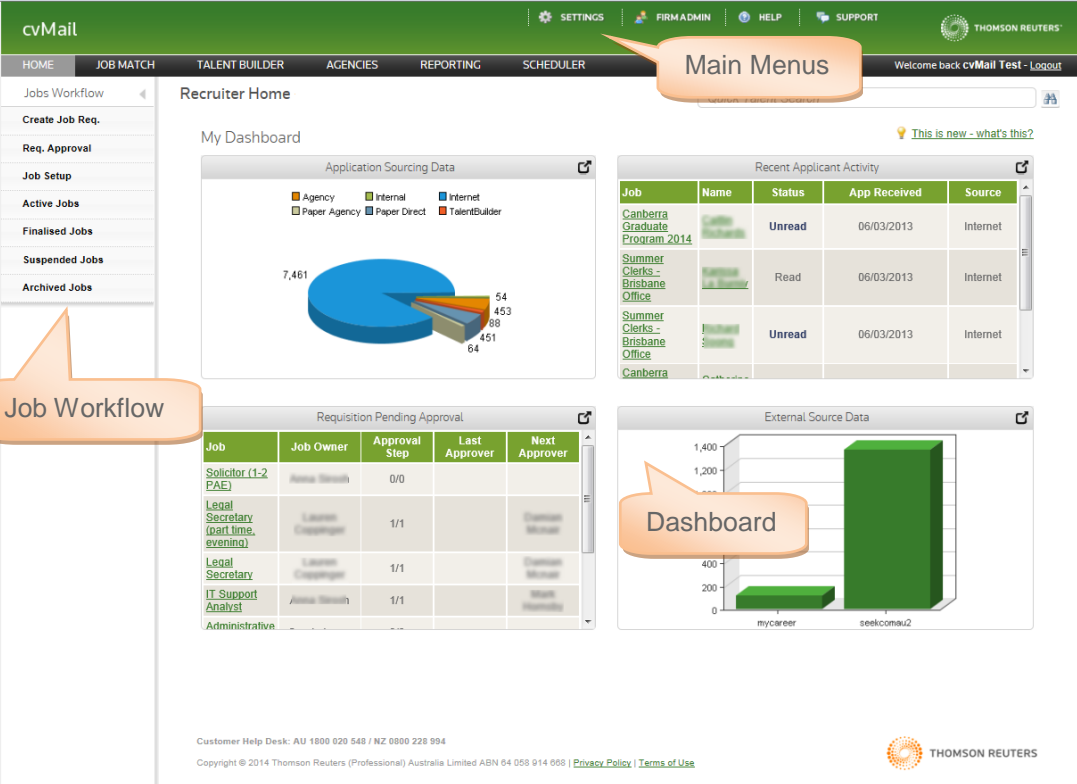
✓ The main menu relates to areas of the system that include a variety of system settings, personal user settings, system help and logging out, as well as a range of system modules.

**2. Jobs Workflow Menu**

✓ This menu displays the job life cycle process (from requisition to publish to closing).

**3. Dashboard**

✓ This area is customisable to the individual user, and is managed by the user. Choose the micro reports that you want to see on your dashboard, to drive your daily recruiter actions.



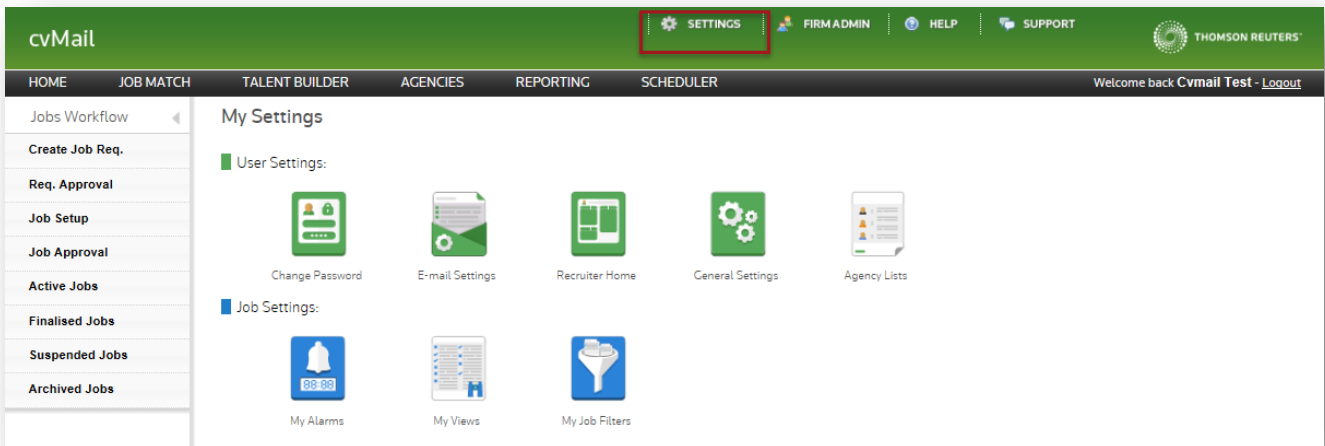
The screenshot shows the 'cvMail' interface with a navigation bar at the top containing 'HOME', 'JOB MATCH', 'TALENT BUILDER', 'AGENCIES', 'REPORTING', and 'SCHEDULER'. A 'Main Menus' callout points to the top right navigation area. On the left, a 'Job Workflow' callout points to a vertical menu with options like 'Jobs Workflow', 'Create Job Req.', 'Req. Approval', 'Job Setup', 'Active Jobs', 'Finalised Jobs', 'Suspended Jobs', and 'Archived Jobs'. The main content area is titled 'Recruiter Home' and features a 'My Dashboard' with several widgets: 'Application Sourcing Data' (a pie chart showing 7,461 total applications with categories: Agency (54), Internal (453), Internet (88), Paper Agency (64), and Paper Direct (451)); 'Recent Applicant Activity' (a table with columns: Job, Name, Status, App Received, Source); 'Requisition Pending Approval' (a table with columns: Job, Job Owner, Approval Step, Last Approver, Next Approver); and 'External Source Data' (a bar chart comparing 'myCareer' and 'seek.com.au'). A 'Dashboard' callout points to the External Source Data widget. The footer includes contact information and the Thomson Reuters logo.

**Note**

Click the "Home" button from anywhere within FSR to return to this screen

## 4.2 SETTINGS

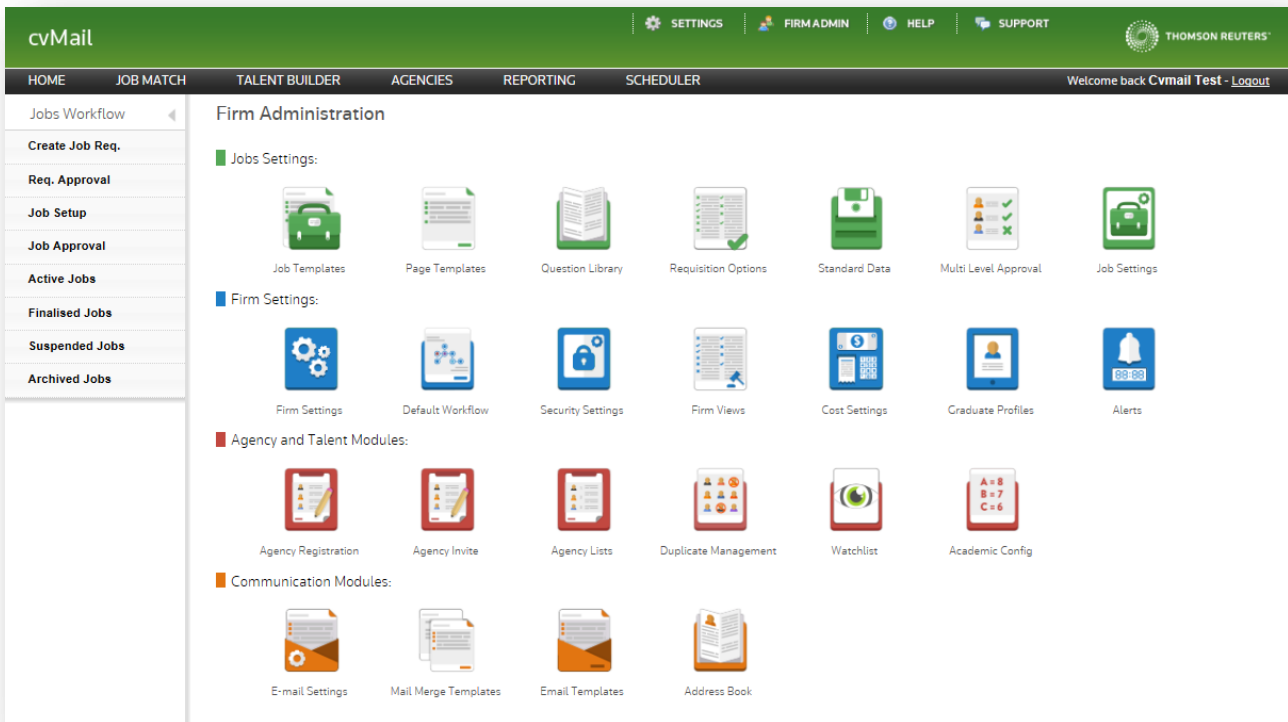
The 'Settings' menu option contains all the settings that are linked to your login. In this area you can change your password and update your email signature, among other actions.



MENU ITEM	EXPLANATION
<b>Change Password</b>	This is where recruiters can easily change their password. Users are not prompted to change their passwords by FSR.
<b>Email settings</b>	Contains email preferences such as: <ul style="list-style-type: none"> <li>✓ Email address</li> <li>✓ Email signature</li> <li>✓ Default reply to for forwarded applications</li> <li>✓ Default message for forwarded applications – <b>Note:</b> Not used</li> </ul>
<b>Recruiter Home</b>	This section enables users to define their dashboard settings.
<b>My Alerts</b>	When a job or application reaches the time setting you choose, the job or application will appear in <b>red</b> to alert you  eg. Applications: if 'Days in Folder' is set to 3 days, each application will turn red if it has been sitting in the same folder for more than 3 days.
<b>General Settings</b>	Contains general preferences such as: <ul style="list-style-type: none"> <li>✓ Auto hide my workbench menu</li> <li>✓ Auto zoom selected application</li> <li>✓ Number of records per page – <b>Note:</b> should be set to display 30 records</li> <li>✓ User time zone</li> </ul>
<b>My Views</b>	Setup views by user
<b>My Job Filters</b>	Setup and manage Job Filters by user
<b>Agency Lists</b>	Allows users to create & manage lists of preferred Agencies, to refer to when publishing.

### 4.3 FIRM ADMINISTRATION

Firm Administration is the area that contains all settings for FSR. Please refer to your Firm Administration document for further information on this area.



MENU ITEM	EXPLANATION
<b><i>Job Templates</i></b>	This area is where you can create, edit and delete job templates. When setting up a new job, the contents of these job templates can be inserted into the new job, making job setup more convenient.
<b><i>Page Templates</i></b>	The Page Templates screen is where you can create, edit and delete page templates. Questions are added to a page which forms a template.
<b><i>Default Workflow</i></b>	Configure a standard set of Workflow Stages and folders (for applications) that will appear in all new jobs and job templates by default.
<b><i>Question Library</i></b>	The question library is where users can create, edit and delete questions that are used all over the system, for example in application forms, the agency questionnaire, application scoring, page templates etc.
<b><i>Standard Data</i></b>	This area is where you can configure custom questions for job requisitions and talent scoring
<b><i>Multi Level Approval</i></b>	Contains the settings for managing multi-level approvals.
<b><i>Job Settings</i></b>	Configure settings related to job management, including standard reasons for delay/suspension and job warnings.
<b><i>Firm Settings</i></b>	Configure settings for firm-wide options, such as the password for internally accessible jobs on the intranet job board.
<b><i>Security Settings</i></b>	This is where you can create and manage FSR users.



<b>Firm Views</b>	Users can customise the columns of information in most listings, creating custom 'views' of data. Create, edit & delete views which are available to all users.
<b>Cost Settings</b>	Create/delete Cost Centres and Categories that regularly contribute to recruitment costs.
<b>Alerts</b>	Configure thresholds of time to alert users to the incidence of requisitions, jobs, applications,
<b>Email Settings</b>	This is where you configure default settings e-mail options, such as Legal Disclaimer, default reply and contact.
<b>Mail Merge Templates</b>	A Mail Merge Template is used to quickly generate many documents with certain fields such as names and addresses.
<b>Email Templates</b>	<p>Email templates are used when communicating with candidates, agencies, referees and interviewers. There are 9 different types of email template that the system uses:</p> <ul style="list-style-type: none"> <li>✓ <i>Standard Notify Email</i> – this type of template is used for all general emails to candidates.</li> <li>✓ <i>Application Email Forwarding</i> – used when forwarding applications to an email address.</li> <li>✓ <i>Reference Request Notify Email</i> – used when requesting a reference for a candidate.</li> <li>✓ <i>Agency Notify Email</i> – similar to the Standard Notify Email but used when communicating with Agencies.</li> <li>✓ <i>Data Expiry Email</i> – not used.</li> <li>✓ <i>Candidate – Invitation to Interview</i> – used to invite candidates to interview using Interview Scheduler.</li> <li>✓ <i>Candidate – Allocated Interview Time Notification</i> – used to advise candidates of their interview time.</li> <li>✓ <i>Interviewer – Invitation to Interview Notification</i> – used to invite interviewers to interview using Interview Scheduler.</li> <li>✓ <i>Interviewer – Allocated Interview Time Notification</i> – used to advise candidates of their interview time.</li> </ul>
<b>Address Book</b>	Create/edit/delete details of independent contacts (non- FSR users) and mailing lists, for use with e-mail actions and especially the online Interview Scheduler
<b>Agency Registration</b>	This is where you compile a questionnaire that agents must answer when registering on the job board. You can also configure scoring codes to grade agencies objectively.
<b>Agency Lists</b>	Allows users to create & manage lists of preferred Agencies, to refer to when publishing.
<b>Duplicate Management</b>	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.
<b>Watchlist</b>	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.
<b>Academic Config (Grads only)</b>	Choose your GPA scoring format. This choice will determine how GPA information is displayed within the applicant record.

#### 4.4 THE HOME SCREEN

The home screen contains all the menu items for job management in FSR. The Jobs Workflow menu contains all of your job process stages from creating the need to recruit, to closing and finalising jobs. Clicking the “Home” option from anywhere in FSR will return to this screen.



cvMail

SETTINGS FIRM ADMIN HELP SUPPORT

HOME JOB MATCH TALENT BUILDER AGENCIES REPORTING SCHEDULER

Welcome back cvMail Test - Logout

Jobs Workflow

Recruiter Home

Quick Talent Search

This is new - what's this?

My Dashboard

Click 'Home'.

Application Sourcing Data

7,461

54 453 88 451

Agency Internal Internet Paper Agency Paper Direct TalentBuilder

Recent Applicant Activity

Job	Name	Status	App Received	Source
Canberra Graduate Program 2014	Callin Richards	Unread	06/03/2013	Internet
Summer Clerks - Brisbane Office	Karissa La Burniv	Read	06/03/2013	Internet
Summer Clerks - Brisbane Office	Richard Soong	Unread	06/03/2013	Internet
Canberra				

Jobs Workflow.

Requisition Pending Approval

	Job Owner	Approval Step	Last Approver	Next Approver
Solicitor (P&A)	Anna Sirosh	0/0		
Legal Secretary (part time, evening)	Lauren Coppinger	1/1		Damian McNair
Legal Secretary	Lauren Coppinger	1/1		Damian McNair
IT Support Analyst	Anna Sirosh	1/1		Mark Hornsby
Administrative				

External Source Data

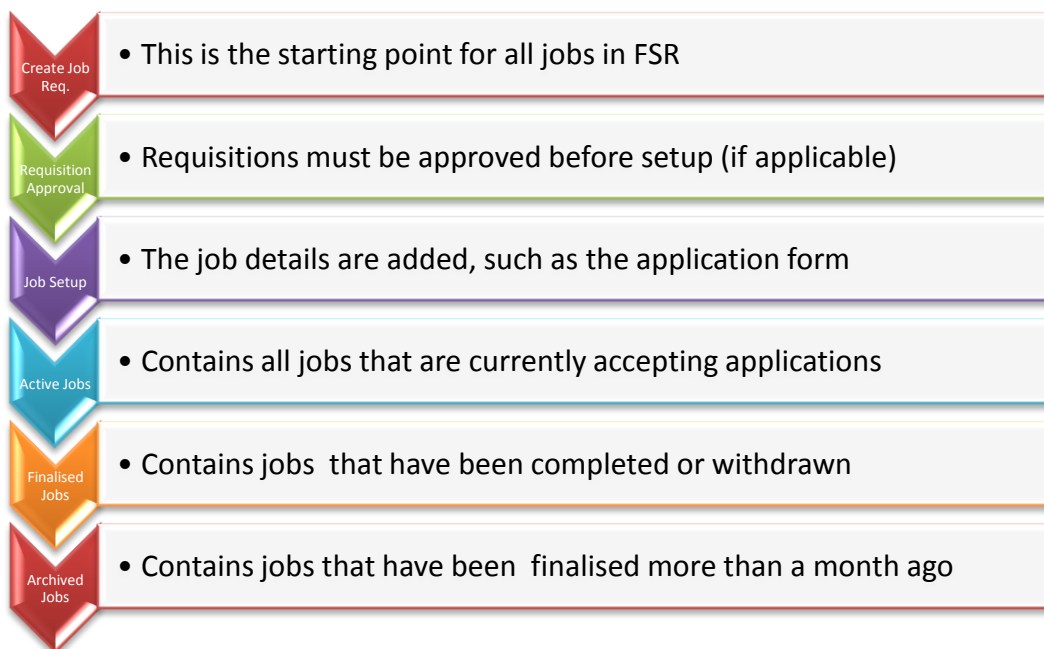
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## Chapter 5: CREATING A JOB REQUISITION

Recruitment for a position must start with a **requisition**.

1. To create a job requisition click the **Create Job Req.** menu option
2. The Create Requisition **form** appears
3. Enter as much information about the position that will be recruited for:

FIELD	WHAT TO ENTER	ADDITIONAL NOTES
<b>Requisition Title</b>	The actual position title for the role	<i>This title appears on the job board so ensure that it is entered in title case</i>
<b>Position</b>	The position type, such as Full Time or Part Time	
<b>Job Type</b>	Normal Job	
<b>Target No. of Hires</b>	The number of people you are recruiting for the position	
<b>Reason for Requisition</b>	The reason for the requisition such as Replacement	
<b>Recruiting Office</b>	Your office location	<i>This is used for reporting against your jobs</i>
<b>Job Location</b>	The job location that you are recruiting for	<i>This field appears on the job board in the job listing. Note: If the job covers an area then select an area rather than a specific location</i>
<b>Position Type</b>	The position type that you are recruiting for, such as Carer	<i>This is one of the search fields on the job board</i>
<b>Area</b>	The geographical area of the position, such as Hills / Norwest	<i>This is one of the search fields on the job board</i>
<b>Salary Min</b>	Optional field, enter the minimum salary for the role	<i>This is used for reporting purposes only</i>
<b>Salary Max</b>	Optional field, enter the maximum salary for the role	<i>This is used for reporting purposes only</i>
<b>Salary Period</b>	Optional field, choose from Day, Week, Month or Year – there is no hour at present	<i>This is used for reporting purposes only</i>
<b>Salary Currency</b>	AUD	<i>This is used for reporting purposes only</i>




<b>Employee Start date</b>	Optional field, enter an estimated start date if you know it	<i>This is used for reporting purposes only</i>
<b>Job Owner</b>	Your name	<i>Select your name from the available list</i>
<b>Requisition Owner</b>	Your name	<i>Select your name from the available list or type your name if it does not appear in the list (it will be saved for next time)</i>
<b>Hiring Manager</b>	Your name	<i>Select your name from the available list or type your name if it does not appear in the list (it will be saved for next time)</i>
<b>Other Stakeholders</b>	Optional field	
<b>Attachments</b>	Optional field, attach any supporting information for the role	
<b>Custom Questions</b>	Customised per organisation	
<b>Approvals</b>	<p>a) If this is a Replacement position, select your manager from the list</p> <p>b) If this is a New Position - Budgeted, select your GM or GH HR or CEO from the list</p> <p>c) If this is a New Position - Not Budgeted or a Changed Position, select your GM HR or CEO from the list</p> <p>*** <i>Approvers must be selected in the order that they will approve the requisition</i></p>	

1. Click the **Create Requisition** button 

**Note**

*The requisition has been created, now you will need to complete a final check and submit the requisition for approval.*

2. Click on **Req. Approval**
3. Click the **Requisition Title** (of the requisition that you have just created)
4. Check that the requisition is completed with all the information required
5. Click the **Submit** button 

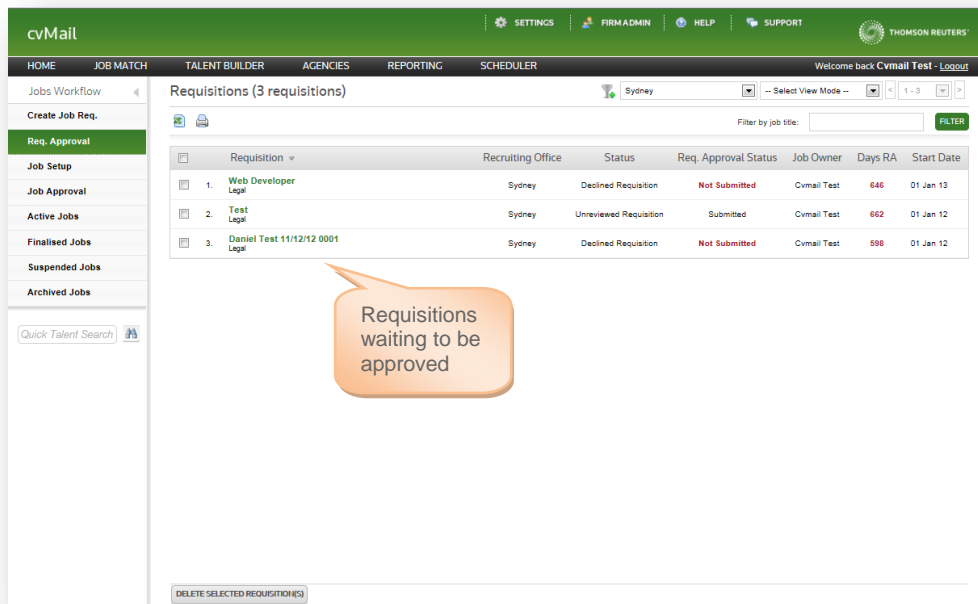
**Note**

*A link to the requisition will be sent via email to the first approver in the list for approval (if applicable)*



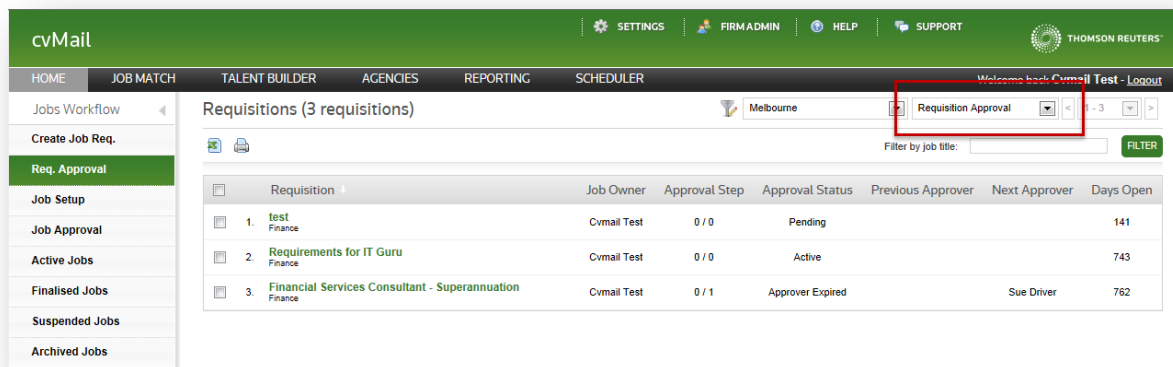
### 5.1.1. Requisition Approval

The 'Req. Approval' screen contains requisitions that are currently at the approval stage.



To view how far through the approval stage a requisition is, change the 'View' at the top of your screen to 'Requisition Approval'

- ✓ If a requisition is active, it means that it has started the approval process.
- ✓ Pending requisitions have not yet started the approval process (i.e. have not yet been submitted)

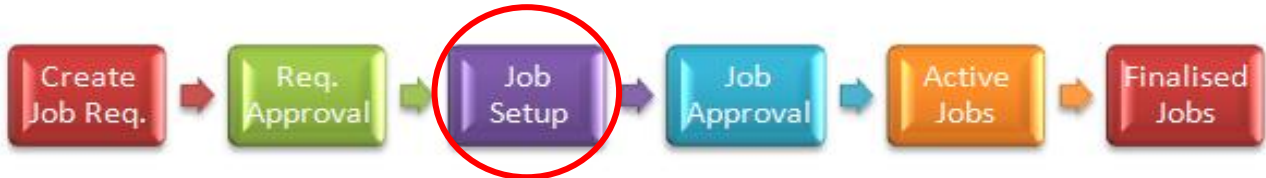




## Chapter 6: CREATE A VACANCY

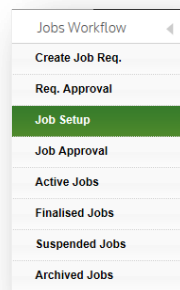
Every job in FSR begins with a Job Requisition. The requisition must be approved before the job can be set up and published.

The Job setup screen contains the list of jobs that are currently at the setup phase.



### 6.1 JOB SETUP

1. Navigate to the **Job Setup** menu. All approved requisitions are located in this area.



2. Click on the **job title** of the approved requisition to begin setup.

- ✓ If this is the first time the requisition has been edited, the background questions appear for the job (below).
- ✓ These options can be accessed at any time during the job set up process, using the **'Show more Options'** button – which is always available at the top of your screen.

Background Questions

Options

Please select a job template to use from the list below:

Job Template:

---

Before you begin, please answer these questions to simplify job creation:

**Job Publication**

1. Display options for publishing to the Internet & Intranet?  
NB: Do not select this option for *tracking jobs*
2. Display options for publishing to recruitment agencies?
3. Display options for publishing to external parties (eg. advertisers, printers, etc...)?
4. Display options for publishing to third party job boards?

**Additional**

- \* Display options for automated scoring and screening questions?

**Important Note:** Configured Additional Options will NOT be active when this option is hidden.  
If automatic email notifications have been configured please ensure the additional options remain visible.



3. Select a **job template** for the position from the drop down menu.
  - ✓ Alternatively you can choose to setup the job without using a template.
  - ✓ Selecting an existing job template simplifies the job setup because specific information about the job can be loaded, such as the application form, advert and auto-notify rules.

**Note**

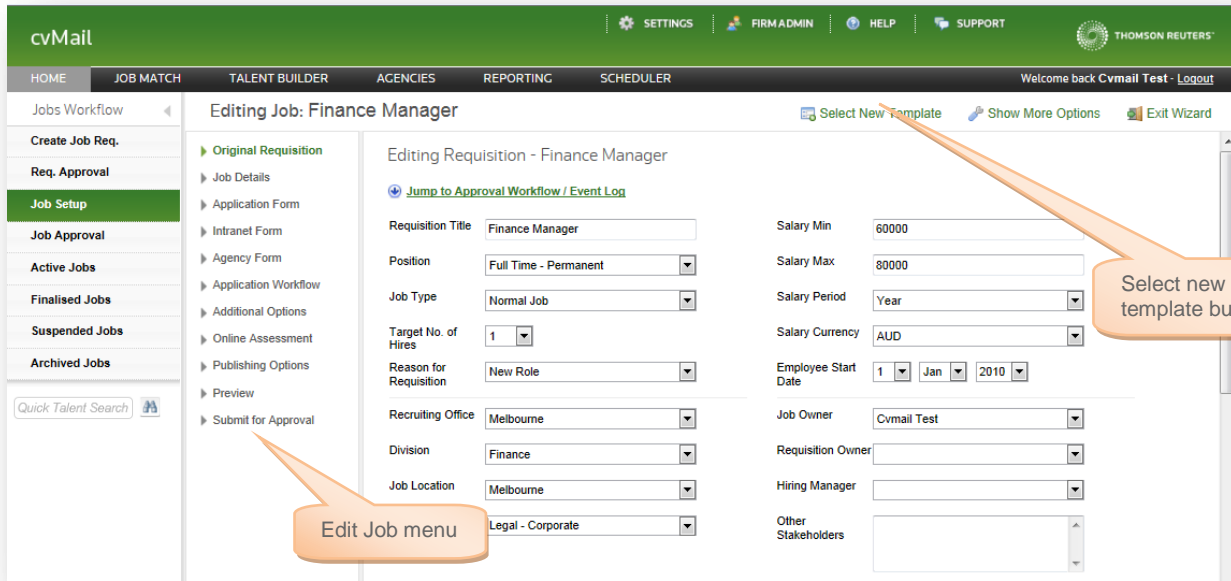
It is more resourceful to set up your job using a background template. During implementation, your consultant should have set up at least one standard template for you to use. Using templates greatly simplifies the process, and expedites the job set up by utilising pre-set questions and scoring/coding parameters. By not selecting a template, you will be required to set up the entire job manually.

4. Select the **publication options** and additional options for the job.
  - ✓ If in doubt, leave all options selected as this setting only **shows** the options – it does not affect the publishing of the job.
  - ✓ These options can be amended at any time using the **Show More Options** button.
5. Click **proceed**.
6. The **Edit Job** menu appears (below).
  - ✓ If the job setup process is abandoned before completion, the recruiter will **return** to the Edit Job menu each time they return to the job.
  - ✓ Use the **Select New Template** button to choose another template for the job. Note that in doing so; any settings currently entered will be overwritten by the new template.
  - ✓ Use the **Show More Options** button to return to the Background Questions screen.
  - ✓ Clicking the Exit Wizard button will return the recruiter to the Job Setup menu.

**Note**

The original requisition (first option on the Job Setup menu) displays the requisition form you first created, and may be “read-only”. This is dependant upon your database configuration. If the requisition is “read-only” in this section, and you wish to edit it – contact your HR administrator for advice as to whether this is authorised – and then contact cvmail Support for assistance. [firmsupport@cvmail.net](mailto:firmsupport@cvmail.net)

7. Click the **Job Details** option on the menu.
  - ✓ Enter the required information for the job – refer to the table below for assistance:



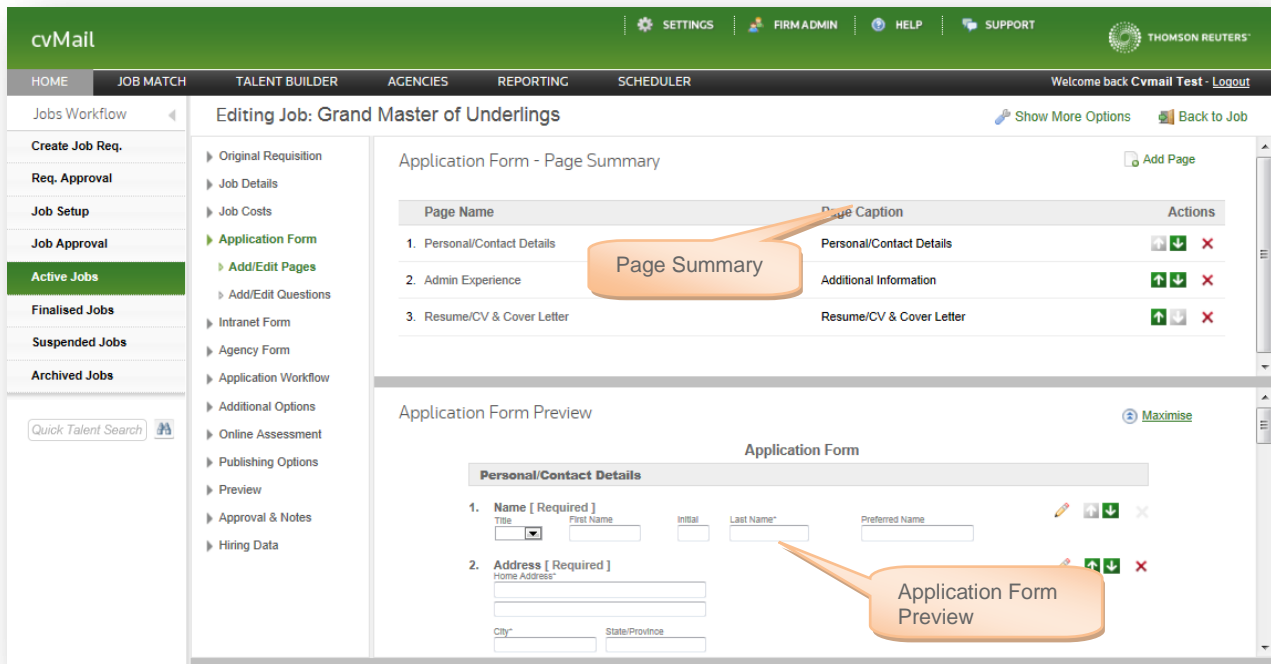
FIELD	DETAILS
<b>Job Title</b>	This field is populated from the requisition title but can be updated / overwritten.
<b>Reference Number</b>	Enter a unique reference number for the job if the field is empty. This is a required field. This field can be auto generated by cvmail if required.
<b>Employee Start Date</b>	This field is populated from the requisition.
<b>Job Time zone</b>	Update the time zone for the job.
<b>Default Advertisement Text</b>	If a template selected contained a job advertisement then this field will already be populated. Update the advertisement as required. <b>IMPORTANT:</b> You <b>must not</b> copy and paste from Word into this box. Instead use Notepad to strip out any prior formatting. If you are unsure contact <a href="mailto:firmsupport@cvmail.net">firmsupport@cvmail.net</a> .
<b>Attachments</b>	Attachments uploaded into this screen will appear on the job board for the candidate to download. Multiple attachments can be uploaded if required.
<b>Reason for Delay</b>	If there is a delay in setting up the job, recruiters can enter a reason. This will display on the Jobs Job Data report and can be configured to appear in a View. Job Delay reasons are created in Firm Administration   Job Settings   Job Delay Reasons.
<b>Internal Notes</b>	Enter any internal notes into this box, these are internal notes only.

8. Use the **Save Details & Preview** button to check that your advertisement is formatted correctly.
  - ✓ If you have copied text from MS Word your advertisement might not display correctly.
  
9. Click the **Application Form** option on the menu, and the screen will split into two parts.
  - ✓ **Page Summary** (top half of screen) shows the pages that make up the application form. Pages can be added, removed and renamed as required using the buttons on the right.
  - ✓ **Application Form Preview** (lower half of screen) shows the questions that appear on the pages/application form. Questions can be reordered, added or deleted to the form as required.

- ✓ The application form for the job is usually configured from the template that you used to create the job; therefore you should only have to check this section.

**Note**

Refer to the Quick Guide: Creating Application Forms for more information, if you need to make changes to this area.



The screenshot shows the cvMail interface for editing a job. The main content area is titled 'Editing Job: Grand Master of Underlings'. It features two panels:

- Application Form - Page Summary:** A table listing the pages of the application form.
 

Page Name	Page Caption	Actions
1. Personal/Contact Details	Personal/Contact Details	↑ ↓ ×
2. Admin Experience	Additional Information	↑ ↓ ×
3. Resume/CV & Cover Letter	Resume/CV & Cover Letter	↑ ↓ ×
- Application Form Preview:** A preview of the 'Personal/Contact Details' form.
  - 1. Name [ Required ]:** Fields for Title, First Name, Initial, Last Name\*, and Preferred Name.
  - 2. Address [ Required ]:** Fields for Home Address\*, City\*, and State/Province.

**Note**

Required fields show with an asterisk\* next to the field – you **MUST** populate these fields.

10. Next, click the **Intranet Form** option on the menu.

- ✓ Repeat the steps taken for the **Application Form** to ensure that the application form for **internal applicants** is correct.

- ✓ This application form for the job is usually configured from the template that you used to create the job, therefore you should only have to check this section.

**11. Click the *Agency Form* option on the menu.**

- ✓ Repeat the steps taken for the **Application Form** and the **Intranet Form** to ensure that the application form for agency applicants is correct
- ✓ The application form for the job is usually configured from the template that you used to create the job, therefore you should only have to check this section.

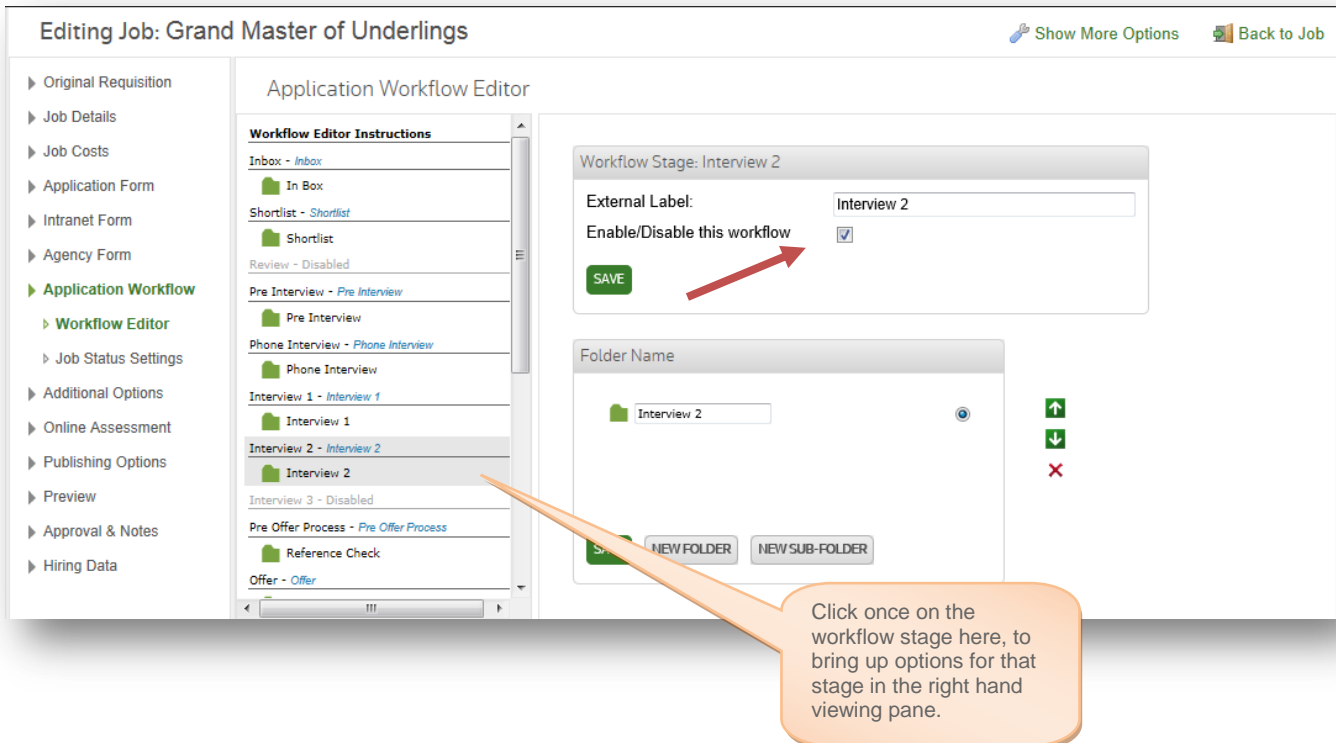
**Note**

if you are not utilising Agency functionality, you can skip this section.

Refer to the Quick Guide: Agency Publishing for more information.

**12. Click the *Application Workflow* option on the menu.**

- ✓ Check that the **workflow** reflects the steps required for the role. For example, if the role requires two interviews, simply disable the Interview 3 workflow stage by unchecking the “**enable this workflow**” box and clicking “save” (see image below).
- ✓ Workflow stages that appear in light grey are currently disabled.
- ✓ If the ‘**Enable this workflow**’ box is not available, the workflow stage has been configured so that it cannot be turned off.
- ✓ The workflow for the job is usually configured from the template that you used to create the job; therefore you should only have to check this section.



The screenshot shows the 'Application Workflow Editor' for a job titled 'Grand Master of Underlings'. On the left, a sidebar menu lists various job configuration options, with 'Application Workflow' and 'Workflow Editor' highlighted. The main area is divided into two panes. The top pane, 'Workflow Editor Instructions', lists stages like 'In Box', 'Shortlist', 'Pre Interview', 'Phone Interview', 'Interview 1', 'Interview 2', and 'Interview 3'. 'Interview 2' is selected. The bottom pane, 'Folder Name', shows a tree view with 'Interview 2' as a folder. A red arrow points to the 'Enable/Disable this workflow' checkbox for 'Interview 2', which is checked. A callout box with an orange border contains the text: 'Click once on the workflow stage here, to bring up options for that stage in the right hand viewing pane.'

**13. Next, click the *Additional Options* section in the menu.**

- ✓ There are five sections under additional options, the most important being **Auto Notify**. This is where the **automated acknowledgement emails** are setup for the job.
- ✓ Check that there is an auto-acknowledgement email applied for the **Inbox** in the bottom part of the window.

- ✓ Auto notify rules are usually configured from the template that you used to create the job, therefore you should only have to check this section.

**Note**

Refer to the Quick Guide: Auto Notifications for more information

14. Scroll through the additional options preview pane (bottom view) to view the additional options applied, such as the screening and scoring rules in place.

**Note**

Refer to the Quick Guide: Screening & Scoring for more information

15. Click the **Publishing Options** section in the menu, this menu controls where the job will be displayed.
  - ✓ If publishing options are not set then the job will not be visible anywhere.
16. Select the publishing option required for the job by ticking the enabled box
  - ✓ Enter the publishing dates and ensure that the end date is correct.



**Publishing Options**

**Application Form Publishing**  
 You can use this section for the following:

- Control when the application forms are available on your internal job board
- Control who can view and access the application forms
- Send job briefs to agencies and/or other external parties

To view/enable all publishing options click on "Show More Options".

Publish To	Opening Date	Closing Date	Customise	Enabled?
1. Tracking Job	*Automatically set when no publishing options specified/enabled.			
2. Internet	27 May 2014	27 Jun 2014		<input checked="" type="checkbox"/>
3. Intranet (internal)	27 May 2014	27 Jun 2014		<input checked="" type="checkbox"/>
4. All Agencies	25 Jul 2014	25 Aug 2014		<input type="checkbox"/>

ADD AGENCY BRIEF    EMAIL LIVE AGENCIES    ADD EXTERNAL BRIEF    **SAVE LISTING**

**External Job Boards**  
 The ability to publish to any of the listed job boards and advertisement costs are governed by your organisation's agreement with the individual job board/aggregator.

Job Board	Description	Status	Dates	Notes
	LinkedIn Professional networking site	Inactive		
	Specialisation: Professional Networking			

**ADVERTISE**

Setting publishing options

17. Click **Save listing** – **very important!** If you make changes and do not click Save listing, your changes will not be saved!
18. If the job is to be published on Seek, click the **Advertise** button.
  - ✓ Enter the details required for Seek publishing

#### Note

Refer to the Quick Guide: *Publishing Options* for more information regarding general publishing.

Refer to the Quick Guide: *Seek Publishing* for more information on publishing specifically to Seek.

19. Click the **Preview** menu.
  - ✓ This page shows a **complete preview** of the job setup in its entirety. If you are happy with your job setup, go to the next step. If not, you can return to any of the previous steps by clicking on the menu option.
20. Click the **Activate Job** option in the menu.
  - ✓ Enter any internal notes if required.
  - ✓ Click the **Activate Job** button.

#### Note

You do not have to activate the job at this point. You can exit and continue job setup later. The job will remain in Job Setup.

You can Activate the job at this point, however if you have not specified any publishing, the job will sit in Active Jobs unpublished (not public) listed as 'tracking'.

21. The job now appears in Active Jobs as an active job

## 6.2 ACTIVE JOBS

'Active jobs' contains the jobs that are currently either accepting applicants or are ready to be published (marked as "Tracking Job"). This is where you can view the candidates that have applied for a position you have requested.



The screenshot shows the 'Active Jobs' window in cvMail. The top navigation bar includes 'HOME', 'JOB MATCH', 'TALENT BUILDER', 'AGENCIES', 'REPORTING', and 'SCHEDULER'. The left sidebar has a 'Jobs Workflow' menu with options like 'Create Job Req.', 'Req. Approval', 'Job Setup', 'Job Approval', 'Active Jobs', 'Finalised Jobs', 'Suspended Jobs', and 'Archived Jobs'. The main content area is titled 'Active Jobs (12 jobs)' and shows a table with the following columns: Job, Recruiting Office, Status, Publishing Status, Apps Rcvd, Days Open, and Fill By. The table lists 12 jobs with their respective details. Callouts point to the 'Views' filter and the 'Active Jobs' grid area.

Job	Recruiting Office	Status	Publishing Status	Apps Rcvd	Days Open	Fill By
1. WHR BDM Sales	Melbourne	Completed	Tracking Job	3/14	0	01 Jan 10
2. UK Interview Test Finance	Melbourne	Inbox	Closed	2	31	01 Jan 14
3. Test - Subdomain Validat Legal	Melbourne	Inbox	Tracking Job	0	0	01 Jan 12
4. Tax Analyst Finance	Melbourne	Inbox	Tracking Job	3	0	01 Jul 08
5. Talegent Interview Test Finance	Melbourne	Inbox	Open Job	3	62	
6. Pork Rind Expert Finance	Melbourne	Completed	Tracking Job	1	0	
7. Pillow Fluffer Support	Melbourne	Inbox	Open Job	3	11	01 Jan 14
8. Head of Potatoes Marketing	Melbourne	Inbox	Closed	2	30	
9. Grand Master of Underlings Finance	Melbourne	Inbox	Closed	1	31	01 Jan 14
10. CSG - Project Manager - Infrastructure IT	Melbourne	Interview 2	Open Job	14	750	01 Jan 12
11. Anglicare - Customer Service Agent Support	Melbourne	Phone Interview	Closed	10	183	01 Jul 11
12. 2011 Graduate Program - Pitcher Partn... Legal	Melbourne			2/19	790	01 Jan 11

### 6.2.1. Understanding the Active Jobs Window

The information that appears in the grid area can be changed by using Views and Filters.

- ✓ **Views:** change the columns of information that appear in the grid
- ✓ **Filters:** Limit the rows that are listed in the grid

The **standard view** in Active Jobs displays the following columns:

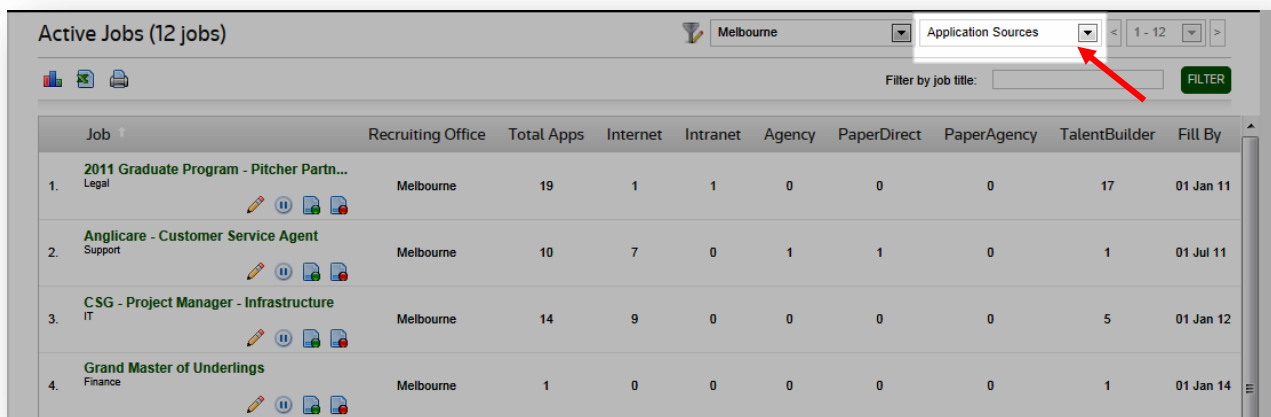
COLUMN	EXPLANATION
<b>Job</b>	The job title of the position
<b>Recruiting Office</b>	The recruiting office location
<b>Status</b>	This column indicates how far through the recruitment workflow the candidates are, e.g. Shortlist means that candidates are currently being shortlisted.
<b>Publishing Status</b>	Indicates whether the job is open (accepting applications) or tracking (not accepting applications – but still active)
<b>Apps Received</b>	The number of applications that have been received to date. All candidate applications arrive into the Inbox folder and are listed in bold text, until they are opened and/or read by a recruiter
<b>Days Open</b>	The number of days that the job has been open



<b>Fill by date</b>	The fill by date for the job
---------------------	------------------------------

### 6.2.2. Changing the Active Jobs View

1. To **change** a view click on the drop down arrow next to “**Select View Mode**”
2. Select a new view, such as ‘**Application Sources**’
3. The information in the grid area **changes** to display new columns:



Active Jobs (12 jobs)

Melbourne Application Sources 1 - 12

Filter by job title:  FILTER

Job	Recruiting Office	Total Apps	Internet	Intranet	Agency	PaperDirect	PaperAgency	TalentBuilder	Fill By
1. 2011 Graduate Program - Pitcher Partn... Legal	Melbourne	19	1	1	0	0	0	17	01 Jan 11
2. Anglicare - Customer Service Agent Support	Melbourne	10	7	0	1	1	0	1	01 Jul 11
3. CSG - Project Manager - Infrastructure IT	Melbourne	14	9	0	0	0	0	5	01 Jan 12
4. Grand Master of Underlings Finance	Melbourne	1	0	0	0	0	0	1	01 Jan 14

4. To change your view back, select **Standard View** again.

#### Note

The Job Setup step is normally carried out by designated HR users only.

## 6.3 FINALISED JOBS

'Finalised jobs' contains jobs that have been completed or withdrawn. This is where you can view the candidates that have previously applied for a position that you requested.

### 6.3.1 Finalising a Job

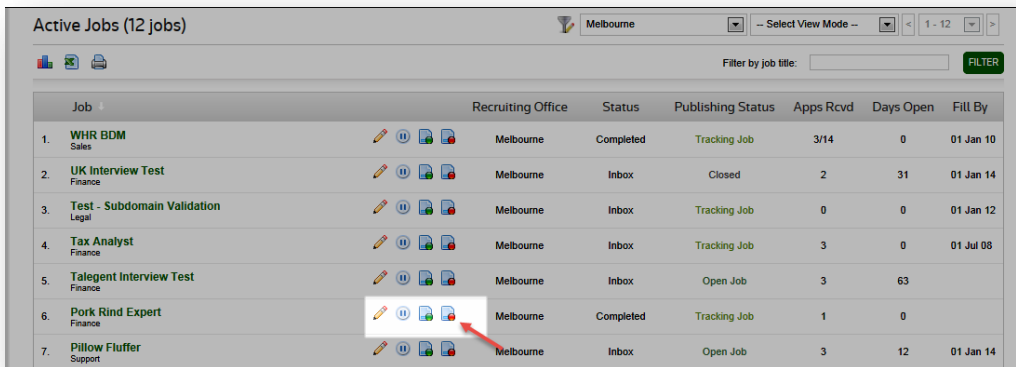
Complete the following steps to ensure correct closure of an active job;

Process all candidates correctly through the workflow, including placing the correct number of hired candidates in the 'Hire' folder.

#### Note

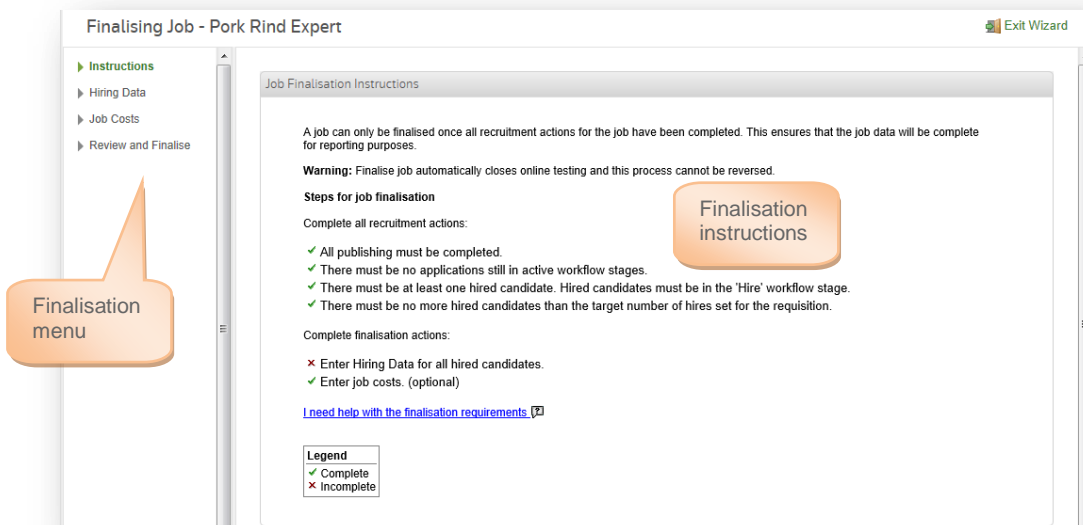
*Check your original requisition form for the job if you are unsure of the number of required hires. The job will not be available to finalise unless the correct amount of hires have been placed in the hire folder.*

1. Ensure that all publishing is switched off.
  - ✓ In the case of your job board, this will happen automatically if you hire past the closing date. If you hire prior to the listed closing date, you must manually change the publishing to 'tracking'.
2. In the Active Jobs listing, click on the Finalise Job icon;



Job	Recruiting Office	Status	Publishing Status	Apps Rcvd	Days Open	Fill By
1. WHR BDM Sales	Melbourne	Completed	Tracking Job	3/14	0	01 Jan 10
2. UK Interview Test Finance	Melbourne	Inbox	Closed	2	31	01 Jan 14
3. Test - Subdomain Validation Legal	Melbourne	Inbox	Tracking Job	0	0	01 Jan 12
4. Tax Analyst Finance	Melbourne	Inbox	Tracking Job	3	0	01 Jul 08
5. Talegent Interview Test Finance	Melbourne	Inbox	Open Job	3	63	
6. Pork Rind Expert Finance	Melbourne	Completed	Tracking Job	1	0	
7. Pillow Fluffer Support	Melbourne	Inbox	Open Job	3	12	01 Jan 14

3. The Job Finalisation screen will appear;



**Finalising Job - Pork Rind Expert** Exit Wizard

**Instructions**

- ▶ Hiring Data
- ▶ Job Costs
- ▶ Review and Finalise

**Job Finalisation Instructions**

A job can only be finalised once all recruitment actions for the job have been completed. This ensures that the job data will be complete for reporting purposes.

**Warning:** Finalise job automatically closes online testing and this process cannot be reversed.

**Steps for job finalisation**

Complete all recruitment actions:

- ✓ All publishing must be completed.
- ✓ There must be no applications still in active workflow stages.
- ✓ There must be at least one hired candidate. Hired candidates must be in the 'Hire' workflow stage.
- ✓ There must be no more hired candidates than the target number of hires set for the requisition.

Complete finalisation actions:

- ✗ Enter Hiring Data for all hired candidates.
- ✓ Enter job costs. (optional)

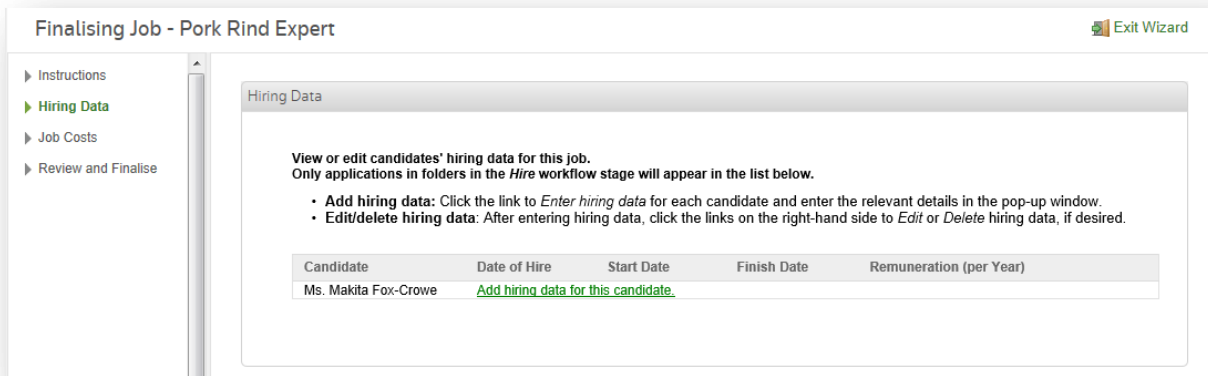
[I need help with the finalisation requirements.](#)

**Legend**

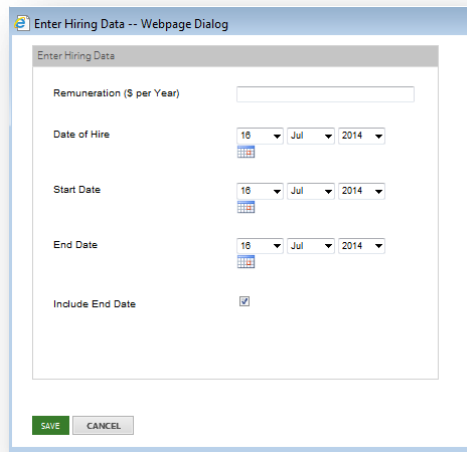
- ✓ Complete
- ✗ Incomplete

4. Read the finalisation instructions page, and then choose the 'Hiring Data' option from the left hand menu.

5. Enter the hiring data for the candidate by clicking on the **green link** as pictured;



6. A pop-up screen will appear, requesting information to be completed;
7. Add in the relevant data and click 'Save'.



**Note**

Hiring data **MUST** be entered for the hired candidate. You cannot skip this step.

8. Click on the 'Job Costs' option in the menu
9. Add in related job costs for the job. This section is **OPTIONAL**.
10. Click on 'Review and Finalise' in the menu

Finalising Job - Pork Rind Expert
Exit Wizard

- ▶ Instructions
- ▶ Hiring Data
- ▶ Job Costs
- ▶ Review and Finalise

**Warning:** Finalise job automatically closes online testing and this process cannot be reversed.

**Finalisation Checklist**

Complete all recruitment actions:

- ✓ All publishing must be completed.
- ✓ There must be no applications still in active workflow stages.
- ✓ There must be at least one hired candidate. Hired candidates must be in the 'Hire' workflow stage.
- ✓ There must be no more hired candidates than the target number of hires set for the requisition.

Complete finalisation actions:

- ✓ Enter Hiring Data for all hired candidates.
- ✓ Enter job costs. (optional)

[I need help with the finalisation requirements.](#)

**Legend**

✓ Complete

✗ Incomplete

**Hiring Data**

Candidate	Date of Hire	Start Date	Finish Date	Remuneration (per Year)
Ms. Makita Fox-Crowe	16 Jul 2014	16 Jul 2014	16 Jul 2014	\$1,000,000.00

**Job Costs**

Centre	Category	Date	Cost
No job costs entered.			

Total Cost \$0.00

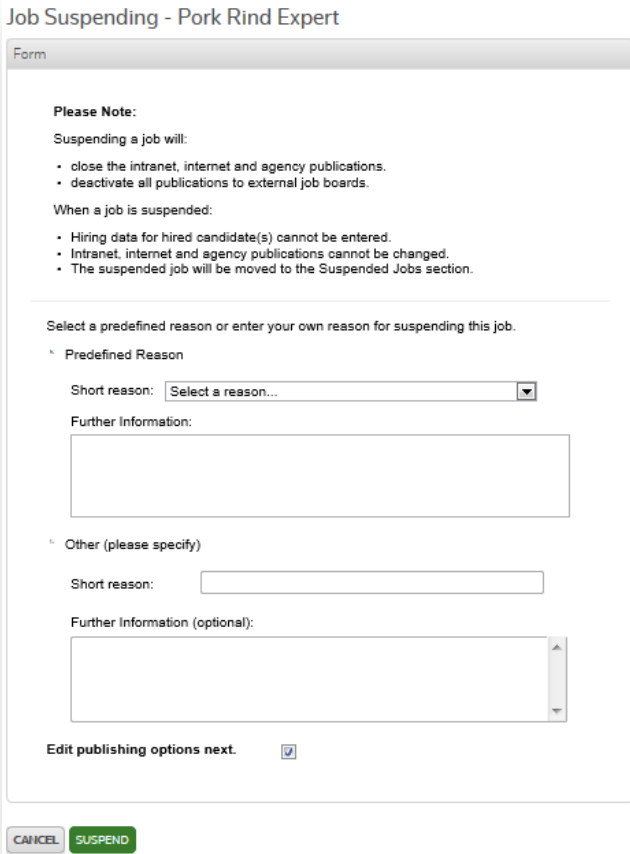
FINALISE JOB

The job will then be pushed through to Finalised Jobs in the job lifecycle menu.

## 6.4 SUSPENDED JOBS

'Suspended jobs' contains jobs that have been suspended temporarily. You can view the candidates that have applied for the position that is suspended.

Follow the same process as closing a job; however you will need to click on the ‘Suspend Job’ icon. Users will only be required to complete a suspension reason set of fields, as below;



**Job Suspending - Pork Rind Expert**

Form

**Please Note:**

Suspending a job will:

- close the intranet, internet and agency publications.
- deactivate all publications to external job boards.

When a job is suspended:

- Hiring data for hired candidate(s) cannot be entered.
- Intranet, internet and agency publications cannot be changed.
- The suspended job will be moved to the Suspended Jobs section.

---

Select a predefined reason or enter your own reason for suspending this job.

\* Predefined Reason

Short reason:

Further Information:

\* Other (please specify)

Short reason:

Further Information (optional):

Edit publishing options next.

1. Click on the ‘Suspend Job’ icon



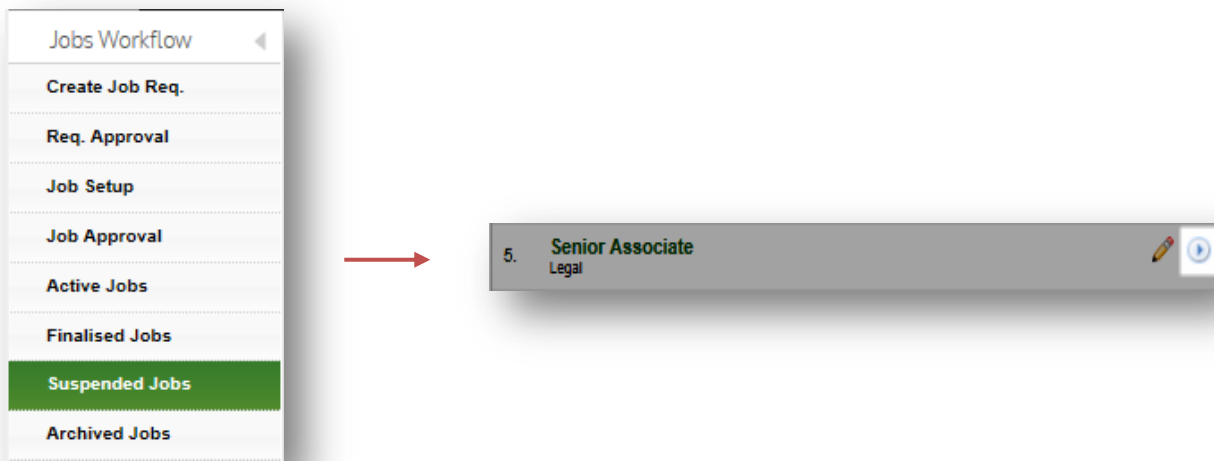
2. The Job Suspending screen will appear
3. Complete the relevant fields. Short reason must be filled in.
4. Click ‘Suspend’.
5. The job will be pushed to the ‘Suspended Jobs’ area of the job lifecycle menu.

**Note**

*There are no restrictions on suspending jobs. You can suspend an active job at any time.*

**6.4.1. Reactivating Suspended Jobs**

1. Navigate to the ‘Suspended Jobs’ area
2. Locate your job, and click on the ‘Resume Job’ icon



## 6.5 ARCHIVED JOBS

'Archived jobs' contains jobs that have been completed or withdrawn for longer than one month. This is where you can view the candidates that have previously applied for a position that you requested.

## 6.6 JOB MATCH

Job match contains the speculative applications (expressions of interest) that have been submitted by candidates. The applications are reviewed and when a position becomes available suitable candidates are asked to apply.

The process of reviewing candidates within the Job Match is exactly the same as reviewing candidates within an active job (i.e.: moving candidates, emailing candidates, etc).

Within Job Match you can:

- ✓ *Review speculative candidates*
- ✓ *Make notes against, or talent code reviewed candidates (very important)*
- ✓ *Contact speculative candidates via email*
- ✓ *Forward speculative candidates to others via email*
- ✓ *Add speculative candidates to an Active Job or another Job Match category.*



cvMail

SETTINGS FIRM ADMIN HELP SUPPORT

HOME JOB MATCH TALENT BUILDER AGENCIES REPORTING SCHEDULER

Welcome back Cvmail Test - Logout

Jobs Workflow Job Match (17 job matches)

Filter by job title: FILTER

Title	Active	Apps Rcvd
1. Administration	Yes	8
2. Customer service	Yes	0
3. Customer Service	No	1/1
4. Engineering	Yes	4
5. Finance	No	0
6. Graduates	Yes	0
7. HR	Yes	5
8. Internal Mobility Registration	No	3

Grand Master of Underlings

All (5) -- Select View Mode -- 1 - 5

First Name Last Name SEARCH Advanced Search

Applicant Name	Status	AutoScore	Received	Days	Source	Email	Folder
1. Cvmail Test Vic, Australia	Read	0	17 Jul 14	32	TalentBuilder		In Box
2. Qwerty Qwerty aaa, Australia	Read	0	17 Jul 14	32	TalentBuilder		In Box
3. Aditya Jagtap VIC, Australia	Unread	0	17 Jul 14	32	TalentBuilder		In Box
4. Kobe Border Vic, Australia	Read	0	17 Jul 14	32	TalentBuilder		In Box

Send E-Mail GO In Box MOVE SAVE

Makita Fox-Crowe Application - Grand Ma Receipt Number: FOX-14-0-1435

1 / 1 Maximise Close

- Application Scores / Codes
- Talent Builder Scores / Codes
- Notes
- File Library
- Event Log

Application Details

Personal/Contact Details

Applicant Name

Name : Ms. Makita Fox-Crowe Preferred Name : [ Not entered ]

Review Candidate Applications

Email, forward, add candidate to job here

Add notes & talent code your candidate here

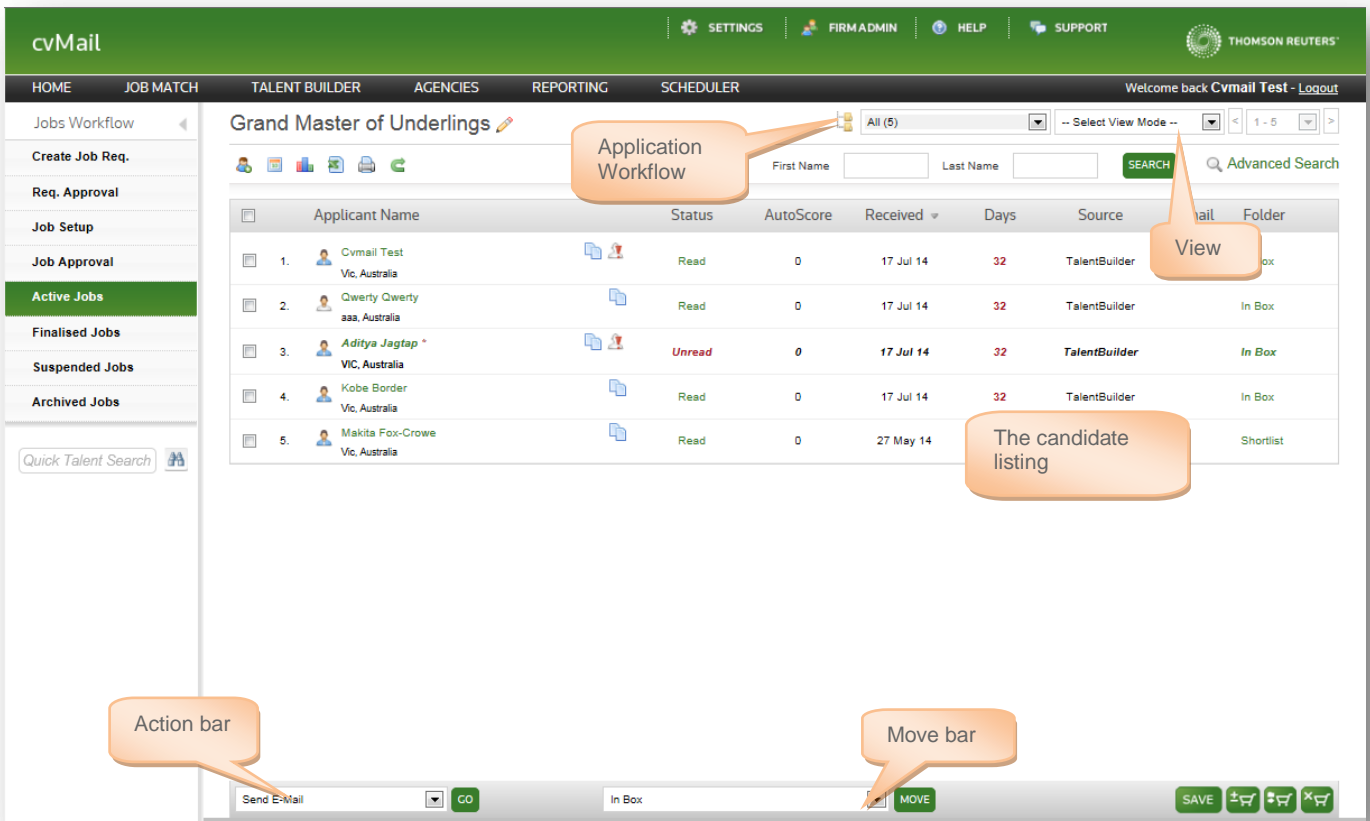
## Chapter 7: VIEWING AND MANAGING YOUR CANDIDATES

### 7.1 THE CANDIDATE WINDOW

You can view the candidates that applied to a particular position by clicking on the job title in either: Active Jobs, Suspended Jobs, Finalised Jobs or Archived Jobs.

In this example you will look at candidates in Active jobs, however the concept is the same regardless of the area of FSR that you are – including Job Match.

1. Click on the Active Jobs menu item
2. The Active Jobs window appears
3. Click on the job title of the position
4. The candidate listing appears, you are currently in the **Inbox**



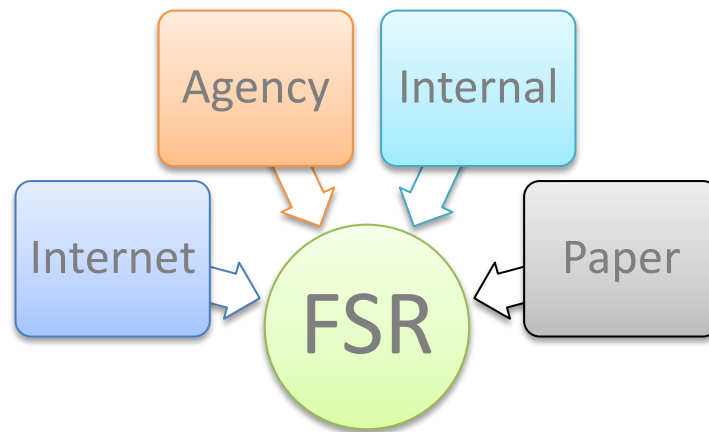
The screenshot displays the cvMail interface for the 'Grand Master of Underlings' position. The table below shows the candidate listing:

Applicant Name	Status	AutoScore	Received	Days	Source	Mail	Folder
1. Cvmail Test Vic, Australia	Read	0	17 Jul 14	32	TalentBuilder	<a href="#">View</a>	In Box
2. Qwerty Qwerty aaa, Australia	Read	0	17 Jul 14	32	TalentBuilder		In Box
3. Aditya Jagtap * VIC, Australia	Unread	0	17 Jul 14	32	TalentBuilder		In Box
4. Kobe Border Vic, Australia	Read	0	17 Jul 14	32	TalentBuilder		In Box
5. Makita Fox-Crowe Vic, Australia	Read	0	27 May 14				Shortlist





All candidate applications arrive into the Inbox folder and are listed in bold text, until they are opened and/or read. Consequently, all applications that are not listed in bold text have been opened and/or read at least once, by the firm's recruiter(s).

Applications can arrive into FSR from the following sources:





Candidate sources can be identified by the image to the left of their name in the listing;

- ✓ *Internet applications* 
- ✓ *Agency applications* 
- ✓ *Internal applications* 
- ✓ *Paper applications* 

**Note**

*Some applications might automatically relocate to folders other than the **inbox**, if they match any **screening rules** configured in the particular jobs' setup.*

## 7.2 APPLICATION WORKFLOW

The application workflow is used to help you manage your candidates through the recruitment workflow.

Applications are usually received into the Inbox (unless screening rules have moved them to a different workflow stage – as your HR consultant for more information about screening rules).

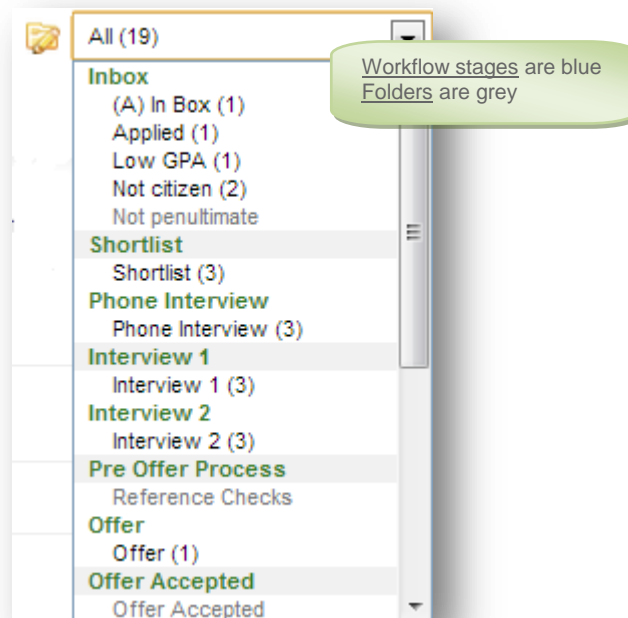
A typical application workflow is tabled below however it is possible for workflow stages to be disabled if they are not applicable for a particular role (this is typically determined by your HR team).

WORKFLOW STAGE	EXPLANATION
<i>Inbox</i>	Contains 'new applications'. The Inbox is where applications are usually received and read.
<i>Shortlist</i>	Candidates that have been shortlisted are moved to the Shortlist workflow stage.
<i>Phone Interview</i>	Candidates that have been selected for a phone interview are moved into this workflow stage.
<i>Interview 1</i>	Candidates that will be invited for first interview are moved into this workflow stage.

<b>Interview 2</b>	Candidates that will be invited for second interview are moved into this workflow stage.
<b>Interview 3</b>	Candidates that will be invited for third interview are moved into this workflow stage.
<b>Assessments</b>	Candidates that have been selected to complete assessment checking are moved into this workflow stage.
<b>Reference Checks</b>	Candidates that require reference checks are moved into this workflow stage.
<b>Offer</b>	Candidates that will be made an offer are moved into the offer workflow stage.
<b>Hire</b>	The successful 'hired' candidate is moved into the Hire folder
<b>Rejected</b>	Unsuccessful candidates are moved into this workflow stage
<b>Withdrawn</b>	Withdrawn candidates are moved into this workflow stage
<b>Trash</b>	The trash folder cannot be modified or removed. Duplicate or otherwise unwanted applications can be move to the trash folder, removing them from the application workflow completely. Trashed applications are essentially deleted and will not be included in reports.

Candidates that have progressed along the recruitment workflow will not be located in the Inbox any longer. To view the applicants that have moved, use the Folder View menu.

1. Click the drop down arrow next to **Inbox**
2. The folder list appears:



3. Click **Reject** to view the candidates in the Reject folder
4. To return to the Inbox click the drop down arrow and select **Inbox**
5. The candidates in the Inbox are displayed once more

## 7.3 VIEWS

Just like the job listing windows, different columns of information can be displayed by selecting a View from the drop-down menu in the title bar.

The 'Standard View' displays the following columns:

COLUMN	EXPLANATION
<b>Applicant name</b>	The applicants full name
<b>Status</b>	The status of the application. E.g. Read
<b>Auto Score</b>	The score that has been applied to the application. Note: this is only available when 'Scoring' has been applied to the application form.
<b>Recv'd</b>	The date the application was received
<b>Days</b>	The number of days the application has been in the current folder
<b>Source</b>	The source of the application, such as Internet or Intranet
<b>Email</b>	This column indicates whether the candidate has received an email (either auto or manual) whilst in this folder

### 7.3.1 Duplicate Candidates

There are two types of duplicates in FSR.

#### ✓ Application duplicates

This icon signifies that the candidate has previously submitted an application to the organisation. Hover your mouse over the icon to be presented with information regarding the total number of applications in other jobs.

#### ✓ Talent duplicates

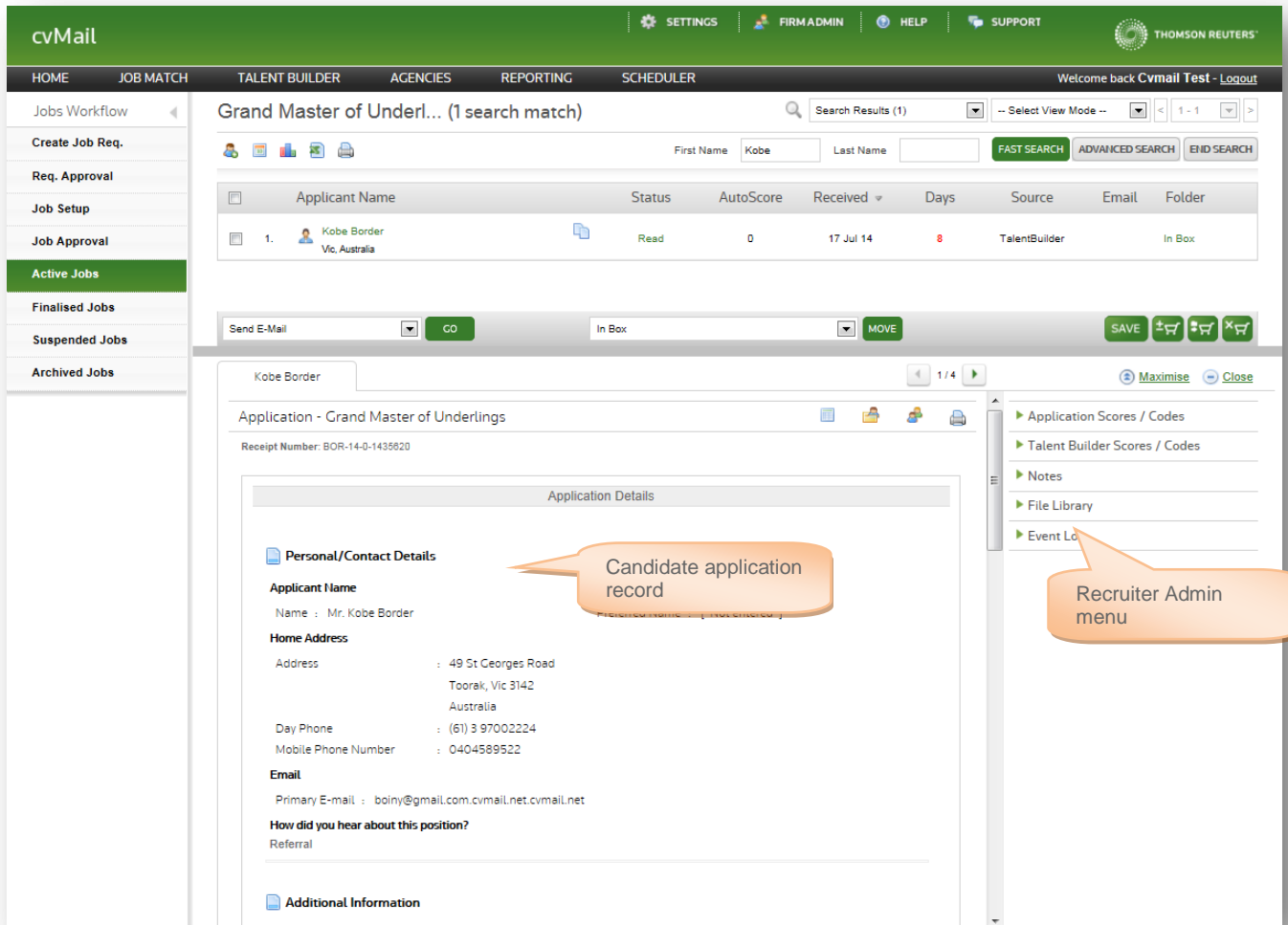
This icon signifies that the candidate has *potentially* created more than one account with the organisation. This can occur if a candidate has registered and submitted an application to your organisation, then some time later returns to the job board and rather than logging in with their existing details they create a new account and submit another record.

## 7.4 VIEWING AN APPLICATION

To view a candidate's application:





1. Click on the **candidate's name** in the listing

2. The candidate's application record opens to show the information entered by the candidate:



The screenshot displays the cvMail interface. At the top, there is a navigation bar with 'cvMail' and utility links like 'SETTINGS', 'FIRM ADMIN', 'HELP', and 'SUPPORT'. Below this is a secondary navigation bar with tabs for 'HOME', 'JOB MATCH', 'TALENT BUILDER', 'AGENCIES', 'REPORTING', and 'SCHEDULER'. A search bar on the right shows 'Search Results (1)'. The main content area is titled 'Grand Master of Underl... (1 search match)'. It features a table with columns: Applicant Name, Status, AutoScore, Received, Days, Source, Email, and Folder. One entry is visible: '1. Kobe Border, Vic, Australia', with a status of 'Read', AutoScore of '0', received on '17 Jul 14', and '8' days remaining. Below the table are buttons for 'Send E-Mail', 'GO', 'In Box', 'MOVE', 'SAVE', and 'X'. The application details for 'Kobe Border' are shown, including 'Application - Grand Master of Underlings' and 'Receipt Number: BOR-14-0-1435620'. The 'Application Details' section is expanded to show 'Personal/Contact Details' with fields for Applicant Name (Mr. Kobe Border), Home Address (49 St Georges Road, Toorak, Vic 3142, Australia), Day Phone ((61) 3 97002224), and Mobile Phone Number (0404589522). Other sections include 'Email' (Primary E-mail: boiny@gmail.com.cvmail.net.cvmail.net) and 'How did you hear about this position?' (Referral). A right-hand sidebar contains a menu with items like 'Application Scores / Codes', 'Talent Builder Scores / Codes', 'Notes', 'File Library', and 'Event Log'. Two callout boxes are present: one pointing to the 'Personal/Contact Details' section labeled 'Candidate application record', and another pointing to the right-hand menu labeled 'Recruiter Admin menu'.

ICON	EXPLANATION
------	-------------

	<p>Use these arrows to move forward and backwards through the application records</p>
	<ul style="list-style-type: none"> <li>• Use <b>Zoom</b> to make the application record fill the entire screen</li> <li>• Use <b>Hide</b> to return back to the application listing</li> </ul> <p><b>Note:</b> There is a setting in My Settings   User Preferences which controls whether an application is automatically ‘Zoomed’ when you click on an applicant’s name.</p>
	<p>Use this icon to print an application record</p>
	<p>Use this option to select between the candidate’s application records (for the job) or talent record (contains the information collated from all applications).</p>

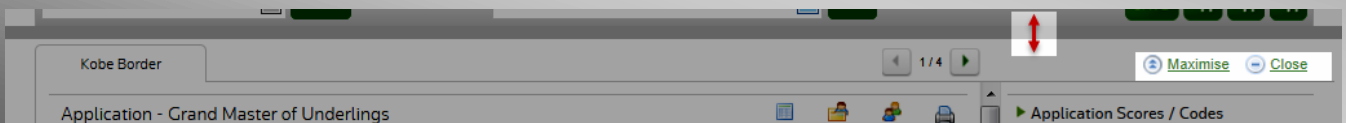
**Note**

Depending on your settings, your application may open halfway on the page (as per the below image). To alter this:

- ✓ Hover your mouse over the grey bar until it changes to a double headed arrow
- ✓ Click and hold
- ✓ Drag the page up and down as required

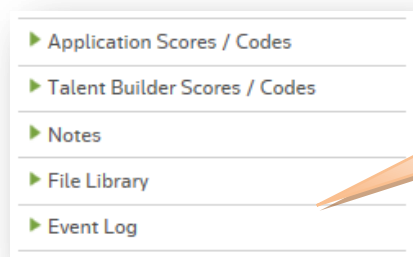
Alternatively:

- ✓ Use Zoom/Hide to manage this window



## 7.5 THE RECRUITER ADMINISTRATION PANEL

The recruiter administration panel is located on the right hand side of the application record. It is used by recruiters to input additional information onto the record. This area is used to store notes and view information that the firm has gathered about the candidate.



Click the arrow to expand the information panel

See tables below for more information on each section of the Recruiter Information Panel.

### 7.5.1. Application Scoring/Coding

Application coding is used to apply information about the *application for this job*. It is not mandatory to use the codes but they can be particularly useful when short listing. Common examples in this area are:

CODE	OPTIONS
<i>Shortlist</i>	Yes, No or maybe
<i>Quality of application</i>	Excellent, Average, Below Average
<i>Addresses Criteria</i>	Exceeds criteria, Meets criteria, Does not meet criteria

To apply an application code to a candidate:

1. Select the appropriate option from the list
2. Click **Update**
3. The codes updated and appended to the bottom of the applicants record.

#### Note

*Application Scores & Codes can be viewed (& updated) as a View in the application listing using Views functionality. Refer to the Quick Guide: Views, for more information.*

*Application Codes cannot be searched through Talent Builder*

### 7.5.2. Talent Builder Scores/Codes

Talent codes are used to input information about candidates that will be useful when searching for talent in the future.

For example, if you are recruiting for a role and have a particularly good selection of candidates - but only hire one applicant. The candidates that missed out could be suitable for other roles within the organisation or, if you were to recruit for that position again you would want to quickly locate those candidates again.

Talent Codes allow you to quickly search for star applicants or exclude candidates that have been deemed unsuitable for the organisation, therefore saving time during the recruitment process.



Example Talent Codes:

- ✓ *Interviewed: Suitable*
- ✓ *Interviewed: Not suitable at this point in time*
- ✓ *Interviewed: Unsuitable*
- ✓ *Not Interviewed: Suitable*
- ✓ *Not Interviewed: Not suitable at this point in time*
- ✓ *Not Interviewed: Unsuitable*

To apply a Talent Code to a candidate:

1. *Select the appropriate option from the list*
2. *Click **Update***
3. *The codes updated and appended to the bottom of the applicants record.*

**Note**

*At the end of each job, recruiters should ensure that **all candidates** have a Talent Code against their record, for future reference.*

### 7.5.3. Adding Notes

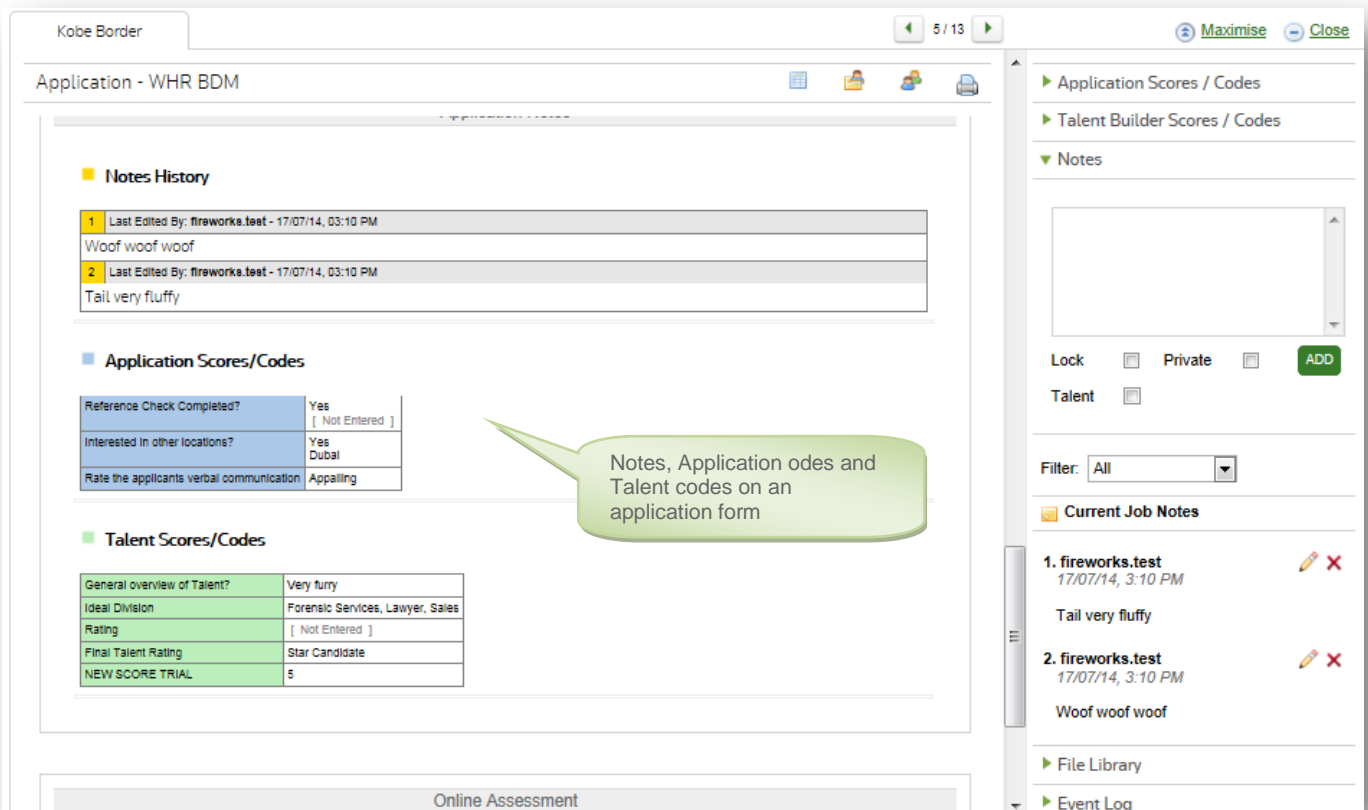
The notes section is used to add free text notes to an applicant's record. As with Application codes and talent codes, the Notes entered are appended to the bottom of the application record.

To add a note:

1. Enter notes into the text box
  - ✓ **Lock** will ensure that nobody deletes the note
  - ✓ **Private** means that nobody else can see the note
1. Click **Update**
2. The notes are appended to the bottom of the applicant's record

To delete a note:

1. Click the **red cross** next to the note **X**
2. The notes are removed from the applicant's record



The screenshot shows a web application interface for 'Kobe Border' with the following sections:

- Notes History:** A table with two entries:
 

1	Last Edited By: fireworks.test - 17/07/14, 03:10 PM
	Woof woof woof
2	Last Edited By: fireworks.test - 17/07/14, 03:10 PM
	Tail very fluffy
- Application Scores/Codes:** A table with three rows:
 

Reference Check Completed?	Yes [ Not Entered ]
Interested in other locations?	Yes Dubal
Rate the applicants verbal communication	Appalling
- Talent Scores/Codes:** A table with four rows:
 

General overview of Talent?	Very furry
Ideal Division	Forensic Services, Lawyer, Sales
Rating	[ Not Entered ]
Final Talent Rating	Star Candidate
NEW SCORE TRIAL	5
- Right-hand side sidebar:** Contains navigation links for 'Application Scores / Codes', 'Talent Builder Scores / Codes', 'Notes', 'Lock', 'Private', 'Talent', 'Filter: All', 'Current Job Notes', 'File Library', and 'Event Log'. The 'Current Job Notes' section lists two entries:
  1. fireworks.test (17/07/14, 3:10 PM) - Tail very fluffy
  2. fireworks.test (17/07/14, 3:10 PM) - Woof woof woof

### 7.5.4. File Library

The file library is where you can view attached files, these can be files attached by the candidate (appear in blue) or by a recruiter (appear in black).





▼ File Library

Title	Date last updated	Delete?
<a href="#">File Attachment u...</a>	17/07/2014	✘
<a href="#">File Attachment u...</a>	17/07/2014	✘

Title

File  No file selected.

Click on the hyperlink to view the attached files

To **add** an attachment:

1. Type a title into the title field
2. Click **Browse**
3. Browse to the location of the file
4. Click **Attach File**
5. The file is attached to the applicants record

To **delete** an attachment:

1. Click the **red cross** next to the attachment ✘
2. The attachment is removed from the applicant's record.

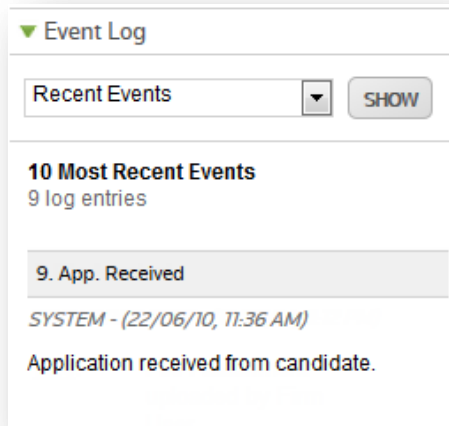
#### Note

Only files added by the organisation can be deleted. Files supplied by the candidate during the application process cannot be deleted by the recruiter.

### 7.5.5. The Event Log

The event log contains a log of all the actions that have been associated with the applicant's record since it was received.

It is also possible to view an exact copy of the emails that have been sent to the applicant from within the system.



## 7.6 ADDING A PAPER CANDIDATE

Recruiters may on occasion receive applications from candidates via email or over desk. We refer to these candidates as “paper applications”

Paper applications can be added to FSR by recruiters or alternatively you can ask the applicant to apply online instead.

To add a paper applicant:

1. Click on the job **title** of the job that you are adding the candidate to
2. Click the **add paper applicant icon** within the icon menu:
3. The add paper application window appears:



### Add Paper Application - Grand Master of Underlings

- ▶ **Agency Details**
- ▶ Personal/Contact ...
- ▶ Pre-submission Du...
- ▶ Additional Inform...
- ▶ Resume/CV & Cover...
- ▶ Preview & Send

#### Agency Details SAVE PAGE

Select an agency and agent from the lists. If you wish to add a new agency or edit an existing one, use the links below.

Select a folder:

Agencies in selected folder:  [Filter](#)

Agents with selected agency:

Related Links: [Add agency to list](#)

**SAVE PAGE**

1. Ignore the Agency Details page (page 1) unless the candidate is agency supplied
2. Click on the **Personal / Contact details** page to enter the candidate’s information
3. Ignore the agency reference number – this is not required
4. Click **Save Page**
5. Click the **Pre-submission duplicate check page**



6. You must check that the candidate is not already in the database
7. If the applicant is not a duplicate you can carry on adding in the application
8. Continue adding as much information as possible about the candidate
9. Click **Save Page** to save the information
10. Click **Preview & Send** page
11. Review the information that you have added
12. Click **Add Paper Application**
13. The paper applicant appears in black in the grid

**Add Paper Application - Grand Master of Underlings**

Record Preview ADD PAPER APPLICATION

Agency Details  
Personal/Contact ...  
Pre-submission Du...  
Additional Inform...  
Resume/CV & Cover...  
**Preview & Send**

**Personal/Contact Details**

**Applicant Name**  
Name : Miss Maya Siwan Preferred Name : Maya

**Home Address**  
Address : 565 Bourke St  
Melbourne, Vic 3000  
Australia  
Day Phone : (03) 546546546  
Mobile Phone Number : 2165464654

**Email**  
Primary E-mail : mayamaya@gmail.com

**How did you hear about this position?**  
Seek

**Additional Information**

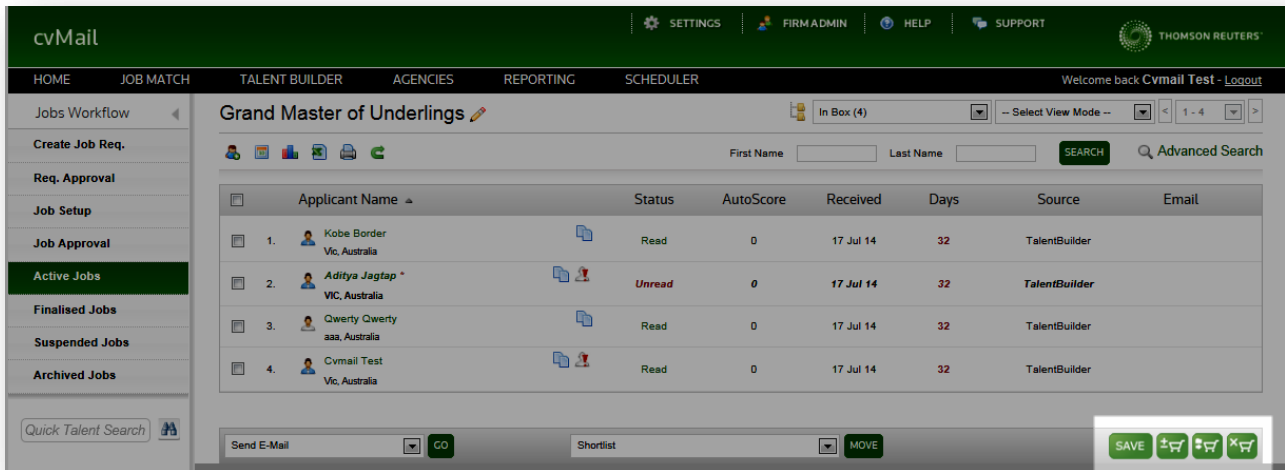
**How many years have you been training in the Grand Master Arts?**  
1-2 years

**Do you collect any of the below?**  
Potato pancakes

**Do you have any experience in the following?**  
Photo bombing, Mooing contests

## 7.7 THE SHOPPING CART


The Shopping Cart feature allows applicants to be short listed, without having to move them between folders. This is very useful tool for screening applications and performing tasks on bulk applications. In fact, all of the application processing features can be accessed from the Shopping Cart folder in the same way you use any other folder.



The best use of the Shopping Cart feature is when moving through multiple pages of different folders, viewing and short listing applications along the way.

All of the short listed applications can then be accessed from the virtual Shopping Cart folder, just like any other folder. For permanent access to the selection of applications, they can all be moved in to a fresh folder, i.e. move the contents of the Shopping Cart into an empty folder.

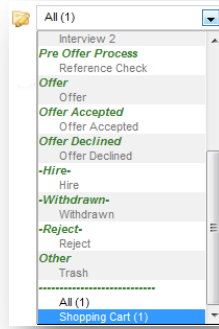
To add/remove applicants to/from the Shopping Cart:



1. Select the applicant(s) by ticking the checkboxes next to their name(s)
2. Click on the **Shopping Cart** icon 

Applications that have been added to the Shopping Cart display a XX icon to the far right-hand side of their name in the application listing.

To view the selection of applications in the Shopping Cart

3. Select **Shopping Cart** in the folder list at the top of the screen (shown below)
4. All of the applications across multiple pages and folders in the current job will be listed.



5. To add all of the applications in the current folder to the Shopping Cart, click the  button.
6. To remove all of the applications in the Shopping Cart, click the  button.

## 7.8 MOVING A CANDIDATE

Once candidate applications have been read, you are ready to move them on through the recruitment workflow. Typically candidates from the Inbox will be moved to either Shortlist or Reject. (Section 5.2 [Application Workflow](#) contains an explanation of the workflow stages).

The screenshot displays the cvMail interface. At the top, there are navigation tabs: HOME, JOB MATCH, TALENT BUILDER, AGENCIES, REPORTING, and SCHEDULER. The main area shows a candidate list for 'Grand Master of Underlings'. The list includes columns for Applicant Name, Score, Received, Days, and Source. Below the list, there is a detailed view of a candidate named 'Kobe Border'. The 'Move bar' dropdown menu is open, showing various workflow stages. Callouts highlight 'Select applicant/s', 'Folder list view', and 'Move bar'.

To move a candidate to another workflow stage:

7. Select a candidate(s) by placing a tick next to their name in the listing (or alternatively click select all)
8. Click the drop down box next to the **Move** bar
9. Select the appropriate workflow stage to move the candidate to, such as Shortlist

10. Click **Move**
11. The candidate disappears from the Inbox
12. The applicant can be viewed by changing the folder view list and selecting the folder that they were moved to.

**Note**

To view all applicants regardless of their place in the workflow, change your folder list view to ALL

## 7.9 USING EMAIL

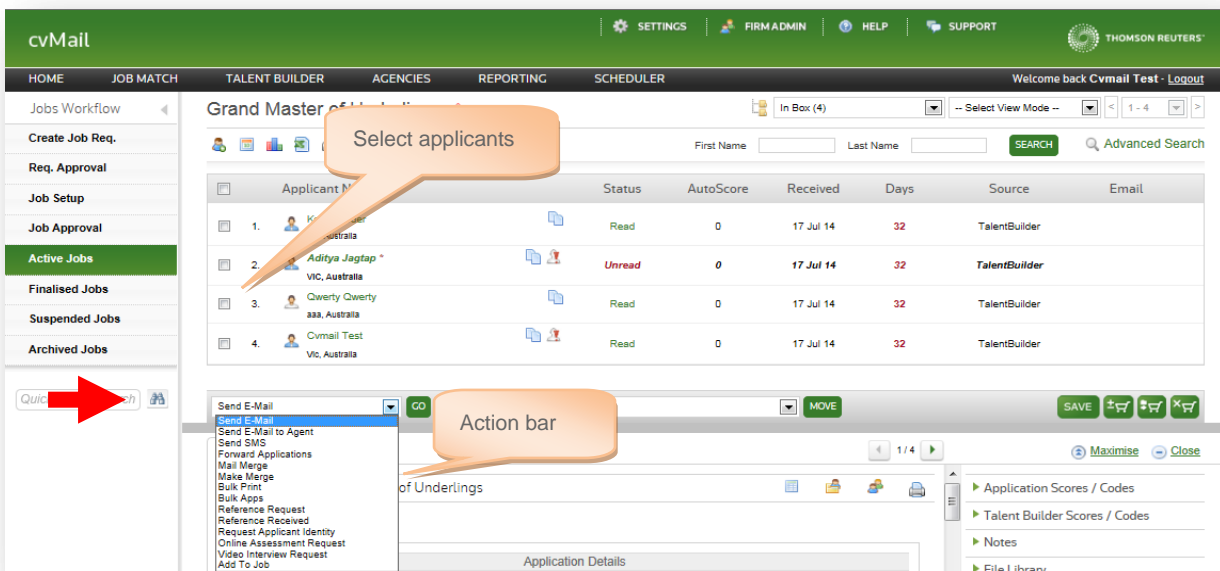
FSR contains a library of email templates that can be used to communicate with applicants, alternatively recruiters can type out an ad hoc email to a candidate.

A copy of the email will be stored against the candidate's record in the event log.

### 7.9.1 Email a Candidate

To send an email to an applicant:

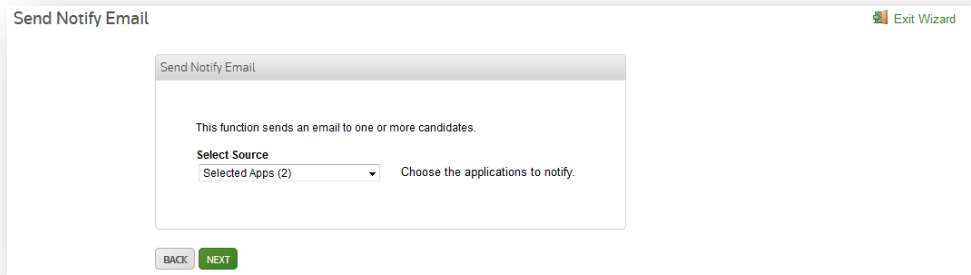
1. Select your applicant(s) in the grid
2. Select **Send Email** from the Action bar
3. Click **Go**



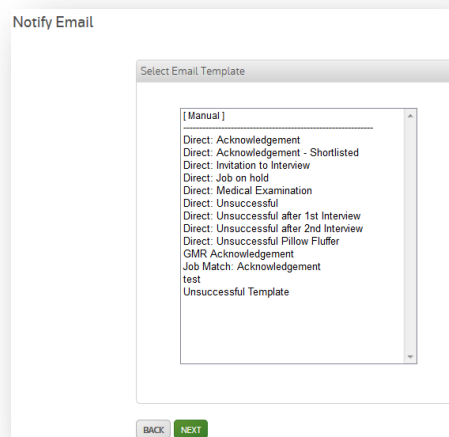
The screenshot displays the cvMail interface. At the top, there are navigation tabs: HOME, JOB MATCH, TALENT BUILDER, AGENCIES, REPORTING, and SCHEDULER. The main area shows a table titled 'Grand Master of Applicants' with columns for Applicant Name, Status, AutoScore, Received, Days, Source, and Email. The table contains four rows of applicant data. Below the table is an action bar with a dropdown menu for 'Send E-Mail' and a 'GO' button. An orange callout bubble labeled 'Select applicants' points to the table. Another orange callout bubble labeled 'Action bar' points to the 'Send E-Mail' dropdown menu. A red arrow points to the 'GO' button.

Applicant Name	Status	AutoScore	Received	Days	Source	Email
1. K... VIC, Australia	Read	0	17 Jul 14	32	TalentBuilder	
2. Aditya Jagtap VIC, Australia	Unread	0	17 Jul 14	32	TalentBuilder	
3. Qwerty Qwerty aaa, Australia	Read	0	17 Jul 14	32	TalentBuilder	
4. Cvmail Test Vic, Australia	Read	0	17 Jul 14	32	TalentBuilder	

4. The wizard process begins



5. Click **Next**
6. The select email template window appears:
7. Choose the appropriate email template or alternatively select **Manual** to type your own email to the candidate



8. Click **Next**
9. The write email window appears; you can edit any of the information to the candidate if required or even attach a file



Notify Email

Write Email

**Subject**  
Fireworks Corp.

**Reply To**  
careers@cvmail.net

**Greeting**

Salutation	Title	First Name	Initial	Last Name	Comma
Dear	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Preview: Dear [first name],

**Message**  
Note: The greeting is automatically inserted at the top of each message.  
Thank you for applying for a position with Fireworks Corp.  
  
Your application is now being reviewed and if successful we will contact you to discuss the next stage of the recruitment process.  
  
Yours sincerely,

**Signature**  
Kind Regards,  
  
HR Team

**Legal Disclaimer**  
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 received this email in error, please reply to their author by return email and delete the original message.

**Attachment**  
Attach new file  
 No file selected.

10. Click Next

11. The choose recipients window appears:

Notify Email

Choose Recipients

**Active Template - 'Direct: Acknowledgement'**

Recipients not contacted with active template:

(None)
Kobe Border - boiny@gmail.com cvmail.net cvmail.net
Aditya Jagtap - aditya.jagtap@hotmail.com cvmail.net cvmail.net
Cvmail Test - aditya.kovf@gmail.com cvmail.net cvmail.net
Qwerty Qwerty - 123@cvmail.net

Recipients already contacted with active template:

(None)
--------

**NB:** The recipients above must be manually selected on this page to confirm re-sending of the notification.

Please click the "Send" button once only, otherwise multiple copies of the same message may be sent.



12. The candidates in the top box will be sent an email, FSR will warn you if the applicant has already been contacted with this email template
13. Click **Send**
14. The summary window appears, this screen will notify you of any emails that could not be sent
15. Click **Finish**

**Note**

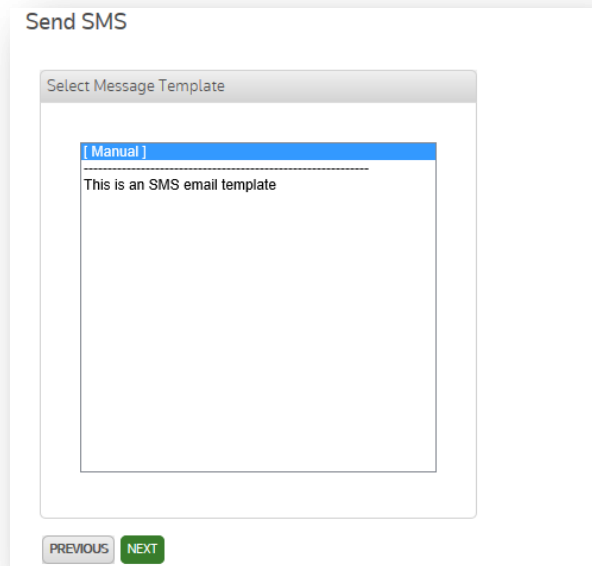
A copy of the email is stored against the candidate's record, which is viewable in the event log.

### 7.9.2. Using SMS functionality

You can contact a candidate via SMS if the candidate has supplied their mobile telephone number. This can be very useful when contacting candidates in bulk.

To SMS to one or more candidates:

1. Select your applicant(s) in the grid
2. Select "**send SMS**" from the Action bar dropdown list
3. Click **Go**
4. The wizard process begins
5. Click **Next**
6. Choose to create a "manual" SMS or select a pre-defined SMS from the library:



7. Click **Next**

8. Depending on your previous selection, either type your SMS message or review the default message
9. Click **Next**
10. The confirmation page will appear:
11. Click **Send**

**Note**

- ✓ Note: the system will identify candidates who have already received this SMS – disabling the user from sending the same SMS to candidates multiple times.
- ✓ Note: the system will automatically notify the user when a selected candidate does NOT have a valid mobile address attached to their application, therefore disallowing an SMS to go through.
- ✓ Note: you can deselect candidates at this point by clicking on the candidate name (will highlight or de-highlight)

### Send SMS

Confirm

**Active Template - This is an SMS email template**

Recipients not contacted with active template:

(None)

Kobe Border (+61404589522)

Recipients already contacted with active template:

(None)

**NB:** The recipients above must be manually selected on this page to confirm re-sending of the notification.

PREVIOUS
SEND

Sending Messages

**SMS Messages successfully sent**

(none)

**SMS Messages that were sent unsuccessfully**

Kobe Border - +61404589522

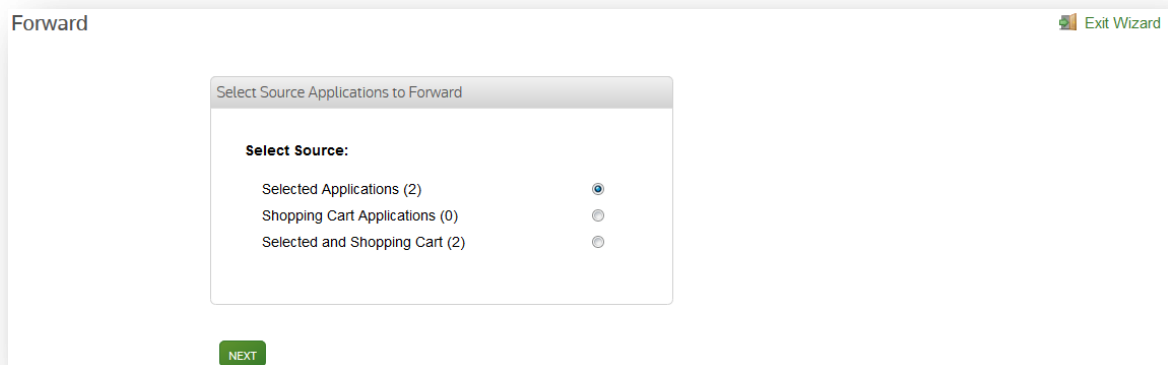
FINISH

### 7.9.3. Forwarding Candidates

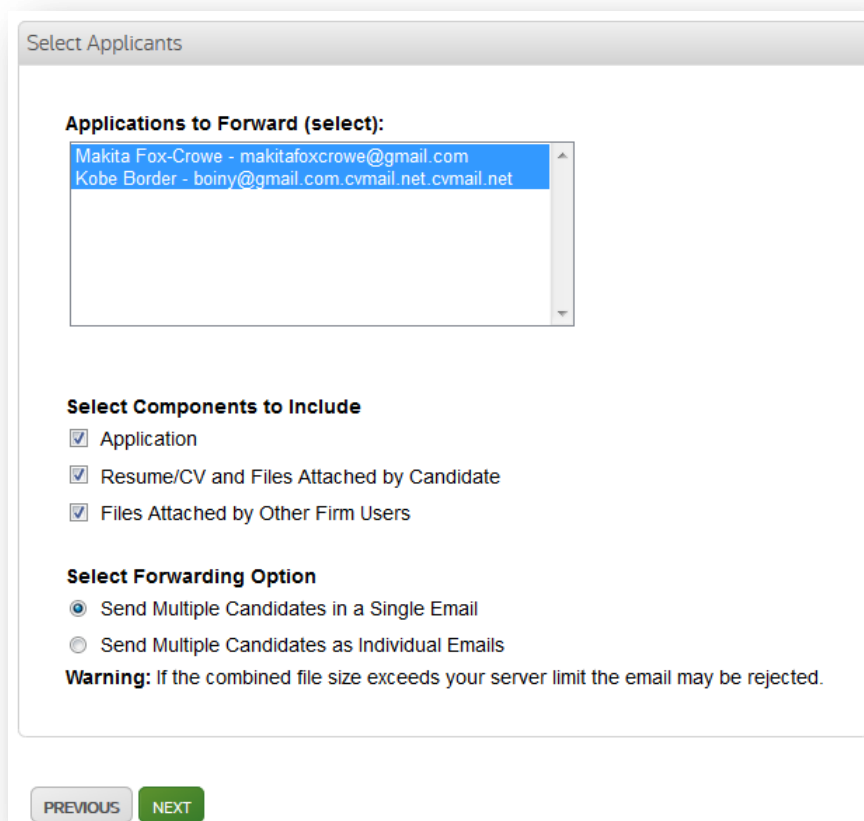
You can use forwarding to forward candidate applications to an email address. This is useful for recruiters that do not have access to FSR for example.

To forward one or more applicants:


1. Select your applicant(s) in the grid
2. Select **Forward Applications** from the Action bar
3. Click **Go**
4. The wizard process begins



5. Click **Next**
6. The select applicants window appears:





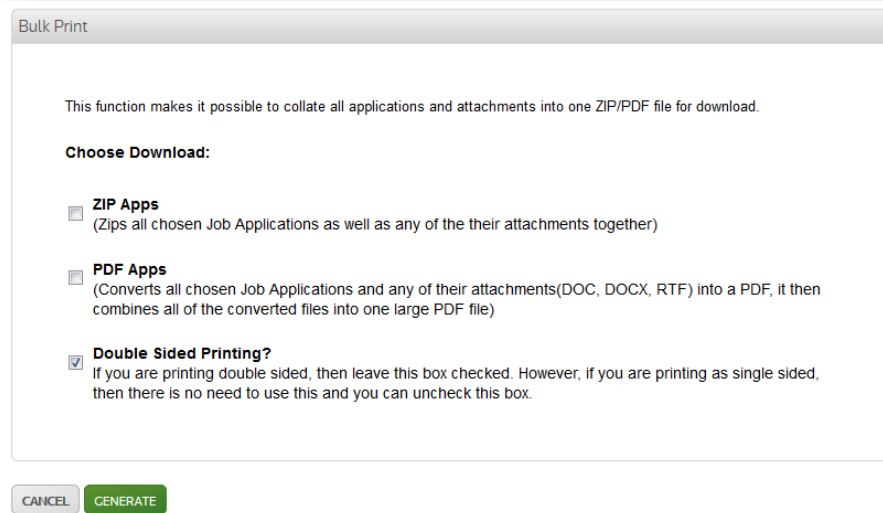
7. Choose the components to include when forwarding
8. Choose your forwarding option
9. Click **Next**
10. Select an email template
11. Click **Next**
12. The forwarding message details appear
13. Enter an email address to forward the applications to, or alternatively click on the Address Book icon 
14. Edit your message as required
15. Click **Forward**
16. The results window appears to advise of successfully sent emails and any that have not been sent.
17. Click **Finish**

#### 7.9.4. Bulk Print

Bulk Print is a useful tool for printing multiple applications and associated attachments relating to the candidate. Applications can be printed from within the candidate's record but using Bulk Print allows you to print all candidates in one step.

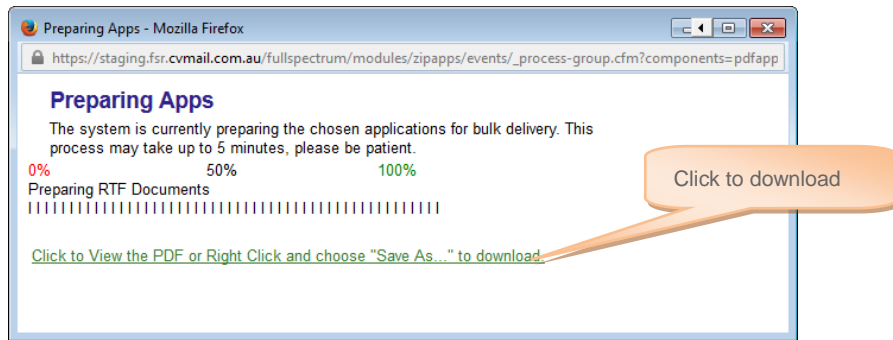
To use Bulk Print:

1. Select your applicant(s) in the grid
2. Select **Bulk Print** from the Action bar
3. Click **Go**
4. The wizard process begins:



The screenshot shows a dialog box titled "Bulk Print". The text inside reads: "This function makes it possible to collate all applications and attachments into one ZIP/PDF file for download." Below this, under the heading "Choose Download:", there are three options: "ZIP Apps" (unchecked), "PDF Apps" (unchecked), and "Double Sided Printing?" (checked). The "Double Sided Printing?" option has a sub-note: "If you are printing double sided, then leave this box checked. However, if you are printing as single sided, then there is no need to use this and you can uncheck this box." At the bottom of the dialog, there are two buttons: "CANCEL" and "GENERATE".

5. Select the format you want the extraction to be (zipped or PDF)
6. Choose double sided printing if you wish
7. Click **Generate**
8. The preparing apps window appears:



9. Click on the '**Click to download**' button to download the files to your computer
10. The files will open in the format you have selected (either zipped or PDF) where you can then print or save.