



# CYBER RECRUITER 7.0: DAILY PROCEDURE GUIDE

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## GOAL OF THIS DOCUMENT

This document is designed to mirror the Best Practices use for Cyber Recruiter. There are many ways to use and configure the system and the document which follows has been compiled based on client feedback and configuration. Should your process be different, please request a copy of this document in Word format so you can make it unique and specific to your organization.

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## ASSUMPTIONS MADE IN THIS DOCUMENT

1. The 'Auto Open' process is being used in conjunction with an approval process. This process allows the jobs to automatically change from the "Needs Approval" to "Open" status as well as post out to the Cyber Recruiter controlled web pages once the approval process is completed.
2. Recruiters are responsible for the 1<sup>st</sup> round of evaluation and management of the recruiting process.
3. Hiring Managers are responsible for requesting new openings, doing interviews and requesting offers.
4. The automatic emails for routings, approvals, etc. are being utilized.
5. Custom email templates are available for use for communication to the applicant throughout the process.
6. Tracing for OFCCP purposes is activated.

## REQUISITION PROCESSES

The 'Create Requisition' process starts the recruiting cycle in Cyber Recruiter. This process is typically very unique to each organization and is configured in Admin > Page Builder > Requisition > Create Req Form. There are three (3) possible options to create a requisition: From Scratch; Approved Template; and Copy an Existing Requisition. Templates are specific requisitions set up with all the necessary defaults. This allows Cyber Recruiter Users to use the templates as a guide and/or fill in missing information as needed. However, they are set up; they need to be set up prior to use of this option.

Copying an existing requisition is the same principle; however it will clone the requirements specific to that requisition which could change depending on when the requisition information is updated and changed. See the Appendix to review additional options to creating a new requisition.

### HOW TO: CREATE A NEW REQUISITION

1. Select Main Menu Bar > Requisitions
2. Select Create Requisition
3. Select 'From Scratch'
4. Complete all required fields; required fields will be marked with an \* asterisk
5. Click 'Continue'
  - a. Depending on set-up, there could be one or two pages that contain required fields
6. Complete all requested job detail information (job description, requirements, etc.)
7. Click 'Continue'
8. Verify all requisition questions to be asked of Applicants when applying to this position
  - a. Click 'Add New Record' to include additional questions
  - b. Click the red 'X' to remove questions from the list
9. Click 'Continue'
10. Select the necessary Approvers from the drop-down list based on your hierarchy and approval chain
  - a. Enter a note to the Approvers if desired
11. Click 'Save Changes' to complete the process
12. A confirmation page lets you know the process is complete
13. Print the requisition details using the link at the bottom if desired.

### HOW TO: APPROVE A REQUISITION

The Approver will receive an email and can review the requisition information in the email and make a decision (Accept/Deny) as necessary and/or can review the requisition information in Cyber Recruiter given the appropriate security permissions.

1. Approver receives the Email (Requisition Approval Email or Requisition Approval Reminder Email)
2. Considers the information in the email
3. Approver clicks on the Accept or Deny hyperlink option list
  - a. Only click the button once, depending it might take some time to get to the next page
4. Approver types in additional note (as needed)
5. Approver clicks Submit
  - a. Accept Response
    - i. If this is not the final approval, the system will send the approval email to the next person in line.

- ii. If this is the final approval the position posting dates will be completed and the status will be changed to Open. In addition, the recruiter and hiring manager will be notified.
- b. Deny Response
  - i. This ends the approval process allowing for further consideration as needed
  - ii. Requisition Approval Notification Email is sent to the Recruiter & the Hiring Manager so they can review the record, make adjustments and re-start the approval process if necessary.

## HOW TO: POST A POSITION

Posting the position the Careers section of your website and Self Service section is typically setup as an automated process after the last Approver passes the requisition. When and where the job is posted to the various sites controlled by Cyber Recruiter is controlled by the date fields on the Main page of the requisition. These fields are generally pre-filled by the system based on posting guidelines set in the Admin section.

Additionally, the organization might want to post the position to certain job boards. Cyber Recruiter has interface capabilities with Monster, Hot Jobs, CareerBuilder and Dice as well as with eQuest which allows one positions to be posted to multiple Job Boards as setup.

### POST POSITION TO WEBSITE

1. Go to Requisition File > Main Page
2. Requisitions post to the website a valid combination is achieved:
  - a. Typical configuration set up is
    - i. Status Field = Open
    - ii. Date Posted Internally = Blank or Value Greater than Today
    - iii. Date Posted Externally = Blank or Value Greater than Today
    - iv. Remove Posting = Blank or Value Greater than Today

### POST POSITION TO INTERFACED JOB BOARDS WITH CYBER RECRUITER

Cyber Recruiter creates a file per specifications determined by the particular Job Board. This file is sent to the Job Board via the Cyber Recruiter system for the Job Board to upload and post positions as received. Every time a file is sent, only the requisitions in *that* file post on the Job Board. For example if 2 positions were posted yesterday and today 2 need to be added, the next file needs to contain all 4 positions. The new file will replace the existing one and only the requisitions in *that* file post.

Additionally each Job Board uploads job differently. Receiving an 'Export Successful' status on the Cyber Recruiter side that does not mean the job is posted automatically. To find out more information about the transition time between sending the file from Cyber Recruiter and Job Boards posting the file, please contact your Job Board representative.

1. Go to Requisition File > Job Board Page (The name of job board will be listed there)
  - a. Enter necessary information on the page to post the position
  - b. Click 'Save Changes' when completed
  - c. There is a statement at the bottom that reads: Req currently is NOT on the export list
    - i. Click the link Click here to add it
    - ii. The statement now reads - Req currently IS on the export list
2. Go to Main Menu Bar > Requisition > Job Boards
  - a. Select the Job Board needed

- b. Select the Account from the drop-down list
- c. Preview Page: Are there any Errors?
  - i. If yes, return to the Requisition File and correct the information and repeat this step.
  - ii. If no, click Submit

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## POST POSITION TO OTHER JOB BOARDS

Posting positions with Job Boards that do not interface with Cyber Recruiter or if the interfaces are not going to be utilized, will continue in the same manner that they are currently done. To keep record of this, the Requisition File > Notes Page can be leveraged to make a note of where the positions are posted.

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## POST POSITION TO AGENCY PORTAL

- 1. Go to the Requisition File > Agency Portal Page
- 2. Highlight the Agencies who should see the position
- 3. Click Save Changes icon
- 4. Click the link 'Click here to send an email to each of the Agencies chosen above'
  - a. This will send an email to the Agency Contact that there is a new position to recruit

## FINDING APPLICANTS

As Applicants apply or if the organization finds an applicant, that applicant's record becomes part of the Cyber Recruiter database. This database can then be accessed to search for applicants for additional openings in the organization.

## HOW TO: SEARCH FOR APPLICANTS

There are three searching tools available in Cyber Recruiter. Each is unique and will provide for different results when the search is completed.

### RESUME TEXT SEARCH

This search looks only to the text version of the resume. If the organization is not gathering the text version of the resume this search will yield little to no result. If however, the organization generally gathers a resume instead of standard application information, this will be a productive search.

1. Go to Main Menu Bar > Applicants
2. Select Applicant Search > Resume Text Search
3. Choose a column to enter keywords
  - a. The 'Required' column if they MUST be in the resume
    - i. All keywords in this column must be found in the Resume to have it returned
  - b. The 'Optional' column if they'd be NICE to have in the resume
    - i. Any keywords in this column will return the resume
  - c. It is not suggested to utilize these two columns together as the 'Required' will always take precedence
4. Choose the appropriate Applicant Statuses to search on:
  - a. Hold CTRL key down to select more than one individual statuses
  - b. Hold SHIFT key down to select multiple statuses in a row
  - c. Blank considers all statuses
5. Choose a date range from the drop-down list
6. Enter Advanced Criteria, if necessary
7. Select a job to connect this search with for OFCCP purposes or enter a note as to why this is not connected to a specific job.
8. Click Search Button
9. On Search Results Page:
  - a. Click on the Applicant's Resume (Gray box icon)
    - i. The text resume will display with the different keywords highlighted in different colors
  - b. Click on the Applicant's Name to view specific Applicant information as needed
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
  - c. Click on the Experience link to view the Experience Page of the file (Skills, Education, Previous Employment, etc...)
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
10. Click Menu Main Bar > Applicant > Applicant Search > Redo Last Search to get back to the last search results
  - a. See the next section 'How To: Email Applicants from Search Results' or 'How To: Route Applicants from Search Results' to consider further action from the searching



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## DATABASE SEARCH

This search looks to the 'database' information. There are six (6) searches that can be performed but they are all exclusive of each other. If the degree search is run, it will not look for majors as that is another search. This search type is very helpful if the organization is gathering skills based on a skills matrix and positions desired (general jobs instead of specific requisitions)

## SKILLS SEARCH

1. Go to Main Menu Bar > Applicants
2. Select Applicant Search > Database Search > Skills Search
3. Choose up to five (5) skills from the drop-down list
4. Choose a filter level:
  - a. ANY Skills – Returns Applicants with any of the skills selected
  - b. AND Skills – Returns Applicant with all skills selected
5. Choose the appropriate Applicant Statuses to search:
  - a. Hold CTRL key down to select more than one individual statuses
  - b. Hold SHIFT key down to select multiple statuses in a row
  - c. Blank means to consider all statuses
6. Choose a date range from the drop-down list
7. Choose a 'Sort By' order from the drop-down list
8. Enter Advanced Criteria, if necessary
9. Select a job to connect this search with for OFCCP purposes or enter a note as to why this is not connected to a specific job.
10. Click Search Button
11. On Search Results Page:
  - a. Click on the Experience link to view the Experience Page of the file (Skills, Education, Previous Employment, etc...)
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
  - b. Click on the Applicant's Resume (Gray box icon)
  - c. Click on the Applicant's Name to view specific Applicant information as needed
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
12. Click Menu Main Bar > Applicant > Applicant Search > Redo Last Search to get back to the search results
  - a. See the next section 'How To: Email Applicants from Search Results' or 'How To: Route Applicants from Search Results' to consider further action from the searching

## REQ REQUIREMENTS SEARCH

1. Go to Main Menu Bar > Applicants
2. Select Applicant Search > Database Search > Req Requirements Search
3. Choose a Requisition from the drop-down list
  - a. NOTE: The Requisition File > Requirements Page needs to be setup for this search to work
4. Choose the appropriate Overall Applicant Status(es) to consider:
  - a. Hold CTRL key down to select more than one individual statuses
  - b. Hold SHIFT key down to select multiple statuses in a row
  - c. Blank means to consider all statuses
5. Choose a date range from the drop-down list
6. Choose a 'Sort By' order from the drop-down list
7. Enter Advanced Criteria, if necessary
8. Click Search Button

9. On Search Results Page:
  - a. Click on the Experience link to view the Experience Page of the file (Skills, Education, Previous Employment, etc...)
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
  - b. Click on the Applicant's Resume (Gray box icon)
  - c. Click on the Applicant's Name to view specific Applicant information as needed
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
10. Click Menu Main Bar > Applicant > Applicant Search > Redo Last Search to get back to the search results
  - a. See the next section 'How To: Email Applicants from Search Results' or 'How To: Route Applicants from Search Results' to consider further action from the searching

## OTHER SEARCHES

1. Go to Main Menu Bar > Applicants
2. Select Applicant Search > Database Search > Degree Search
3. Choose a Degree from the drop-down list
4. Choose the appropriate Overall Applicant Status(es) to consider:
  - a. Hold CTRL key down to select more than one individual statuses
  - b. Hold SHIFT key down to select multiple statuses in a row
  - c. Blank means to consider all statuses
5. Choose a date range from the drop-down list
6. Choose a 'Sort By' order from the drop-down list
7. Enter Advanced Criteria, if necessary
8. Select a job to connect this search with for OFCCP purposes or enter a note as to why this is not connected to a specific job.
9. Click Search Button
10. On Search Results Page:
  - a. Click on the Experience link to view the Experience Page of the file (Skills, Education, Previous Employment, etc...)
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
  - b. Click on the Applicant's Resume (Gray box icon)
  - c. Click on the Applicant's Name to view specific Applicant information as needed
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
11. Click Menu Main Bar > Applicant > Applicant Search > Redo Last Search to get back to the search results
  - a. See the next section 'How To: Email Applicants from Search Results' or 'How To: Route Applicants from Search Results' to consider further action from the searching

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## CYBERSEARCH

CyberSearch combines the database search, the resume text search and the ability to search other items in the Applicant's file. If a search is needed of applicants who answered a specific applicant question a certain way and have a degree in Human Resources and worked for Intel. This search would allow the user to create the criteria to look for applicants who fit those needs.

## HOW TO: ADD A CYBERSEARCH

1. Go to Main Menu Bar > Applicants
2. Select Applicant Search > Cyber Search
3. Click 'Add New Record' to create a new search
  - a. Select a Name

- b. Add a Description as needed
  - c. Click the Share checkbox if others should be able to use this search
  - d. Click Save Changes
- 4. Click the Edit link to edit the properties of the search
- 5. Click Add icon to select the criteria to consider for this search
  - a. Select a criteria from the drop-down box
  - b. Depending on the criteria selected, different options to what is considered with the piece is offered.
  - c. Click Save Changes
  - d. Repeat the process as many times as necessary to build the criterion list
    - i. NOTE: Applicants returned need to match all selected criteria filters

## HOW TO: RUN A CYBERSEARCH

- 1. Go to Main Menu Bar > Applicants
- 2. Select Applicant Search > Cyber Search
- 3. Select a job to connect this search with for OFCCP purposes or enter a note as to why this is not connected to a specific job.
- 4. Click Run link for the desired Search
- 5. On Search Results Page:
  - a. Click on the Experience link to view the Experience Page of the file (Skills, Education, Previous Employment, etc...)
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
  - b. Click on the Applicant's Resume (Gray box icon)
  - c. Click on the Applicant's Name to view specific Applicant information as needed
    - i. Use the scrolling feature (< > Icon) at the top to go to the next Applicant file in the search results list
- 6. Click Menu Main Bar > Applicant > Applicant Search > Redo Last Search to get back to the search results
  - a. See the next section 'How To: Email Applicants from Search Results' or 'How To: Route Applicants from Search Results' to consider further action from the searching

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## EVALUATING APPLICANTS

If an Applicant completes the application process his/her information is directed to someone at the organization to evaluate the qualifications for the position or if the Applicant is found during a search, the next step is to review the Applicants information against the position.

## HOW TO: RESPOND TO THE ROUTING EMAIL

1. When the Auto Routing Email is enabled, an email is sent to the Recruiter and/or Hiring Manager of the position when an Applicant applies to a position:
  - a. User receives and opens the email
  - b. Review the routing email and consider the Applicant's information
  - c. Click on the appropriate response/evaluation status
  - d. Enter a note if additional information needed for the status selected
  - e. Click Submit

**NOTE: Not taking action in this way will leave an action item outstanding in the system and Cyber Recruiter will not be update to date even if you continue to evaluate the applicant.**

2. Is the Applicant going to move forward in the recruiting process?
  - a. If No: The process can end at this point for this requisition
    - i. Take an additional actions as needed
  - b. If Yes: Route to the next person to evaluate the applicant or call to schedule an interview

## HOW TO: ROUTE APPLICANTS TO OTHER EVALUATORS

If additional evaluation is needed, this is accomplished through routings. There are several ways to route (From Inbox, From Search Results, From the Requisition, and From the Applicant File). The example below is starts the process from the requisition file; check the appendix for other examples.

After Applicants are reviewed, the User can elect to send an email to a Hiring Manager (or any User in the system) with the applicant's information and resume. This action will add a routing record to the Applicant File > Activity Page > Routing Tab and History. Additionally, the ability to attach the Applicant to the Requisition is possible.

1. From the Applicants Page, select the Applicants to route:
  - a. Select All link to select all Applicant
  - b. Deselect All link to deselect all the Applicants
  - c. Check the checkbox for individual Applicants as needed
2. Click the Route button
3. Highlight the person (or people) who should receive this Applicant's information
  - a. Hold CTRL key down to select individual Users
  - b. Hold SHIFT key down to select multiple Users in a row
4. Add the Applicant(s) to the selected Users Cyber Recruiter Inbox if they should be able to access the Applicant files quickly
5. Select how to notify the selected Users with the following Email option:
  - a. Select "Send email with all applicants listed" Option:
    - i. This will send one email will all the Applicants names listed alerting the User to log into Cyber Recruiter to take further action from the Home Page

- b. Check "Allow Response from Email":
    - i. This will allow the recipient can make a decision about the Applicant via the email without logging into Cyber Recruiter and it will update the routing activity.
  - c. Check "Email Responses Back to Sender":
    - i. This will ensure you are notified of the recipient's response.
  - d. Check "Update Applicant's Req Status" (only available if sending to one person)
    - i. This will ensure the status for this applicant regarding this position is updated at the same time the response is captured.
- 6. Enter a note to the recipient if desired
- 7. Click Save Changes

## HOW TO: RECORD PHONE SCREEN

If an applicant is qualified for a position, the designated person at the organization can perform a phone screen with the applicant to further qualify this person. Phone screen questions can be generic to the organization or specific to the requisition. Either or both options selected are located in the same place in the Applicant File.

- 1. Enter the Applicant File
- 2. Click on the Demographics Page
  - a. Copy down the Phone Number
- 3. Call Applicant
  - a. If the Applicant is available; Click Notes Page:
    - i. Click Notes Page:
      - 1. Click 'Add New Record' Link
      - 2. Select a Note Type
      - 3. Enter the notes from the Phone Screen
      - 4. Highlight Users who should receive this note if necessary
      - 5. Click Save Changes
    - ii. Click the Activity Page:
      - 1. Click on the Applicant Status for the Requisition phone screened
      - 2. Select the new status from the drop-down list
      - 3. Enter the Date
      - 4. Check other boxes as needed
      - 5. Click Save Changes
  - b. If the Applicant was not available; Click Notes Page:
    - i. Click Notes Page
      - 1. Click 'Add New Record' Link
      - 2. Select the Note type from the drop-down list
      - 3. Enter a Follow-Up Date of when Applicant will be contacted again
        - a. Follow-Up Date will put the action item on your home page on that date
      - 4. Enter a note about the attempt
      - 5. Click the Save Changes

## HOW TO: RECORD APPLICANT INTERVIEW

After an Applicant is evaluated for a position, the designated person at the organization can schedule an interview with the necessary Interviewers and the Applicant. An interview confirmation email can be configured by the Administrator to help facilitate communication of the interview both to the Interviewers and Interviewees. Upon receiving an interview request, the Interviewers can confirm the attendance via the email.

1. Coordinate schedules with the Interviewers and Applicant (often this is done via a phone call, preview of calendars, etc...)
2. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
3. Go to the Activity Page > Interview Tab
4. Click 'Add New Record' Link
  - a. Highlight the person (or people) who will interview the Applicant
    - i. Or use the people icon off the Requisition field to select the Hiring Manager of the requisition
  - b. Enter Date of Interview
  - c. Enter Time of Interview
  - d. Set the Time Zone
  - e. Set the Duration
  - f. Enter the Location
  - g. Select the Requisition
  - h. Select the new Applicant Status for the Requisition
  - i. Check the box for the Recruiter and/or Hiring Manager if they should be notified that an interview is being set up
    - i. This is not an interview request, rather an FYI email of the what is happening
  - j. Enter Desired Note
5. Select Email Details:
  - a. Check "Email Interviewer":
    - i. This ensures the people highlighted will receive the interview confirmation email.
  - b. Check "Request Confirmation":
    - i. This ensures the interviewer is prompted to acknowledge the confirmation email. It will put a reminder on his/her home page after confirming and update the interview calendar and the applicant's file with the response.
  - c. Check "Interview Evaluation Link":
    - i. This will ensure a link for the interview evaluation is sent in the email so the interviewer can quickly access the form and complete the evaluation form once the interview is complete.
  - d. Check to Email the Applicant
    - i. This will start an email wizard to allow you to confirm the interview with the applicant.
6. Click Save Changes
  - a. Select the "Interview Confirmation Email" Template
  - b. Continue through the wizard to complete the details and send any additional information to the applicant necessary for the interview.

## HOW TO: RECORD INTERVIEW RESULTS

This section breaks down capturing interview questions as well as feedback from the Interviewer in the interview evaluation form.

1. After the interview, the interviewer should click the link to complete the evaluation form.
  - a. Recruiter is notified by Email when forms are completed
2. Is the Applicant going to move forward in the recruiting process?
  - a. If No: The process can end at this point for this requisition
    - i. Enter the Applicant File > Activity Page > Assigned Reqs Tab
    - ii. Click on the Applicant Status link for the Requisition
    - iii. Select the new Status from the drop-down list
    - iv. Enter the date
    - v. Check the boxes as needed
    - vi. Click Save Changes

- b. If Yes:
    - i. Enter the Applicant File > Activity Page > Assigned Reqs Tab
    - ii. Click on the Applicant Status link for the Requisition
    - iii. Select the new Status from the drop-down list
    - iv. Enter the date
    - v. Click Save Changes
3. Use the notes and correspondence pages to communicate with the applicant and record the contact.

## HOW TO: CHECK REFERENCES

The Applicant has the ability to provide the organization with reference contacts for the purpose of verifying his/her background, experience, integrity, etc. The Applicant can provide the contact information during the original application process or via the Self Service Module depending.

1. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
2. Go to the Reference Page
  - a. Click the Edit button at the beginning of the Reference name
    - i. Is Reference Available?
      1. If Yes:
        - a. Mark Verified to Yes
        - b. Enter Date of Verification
        - c. Select the User from the Drop-Down list
        - d. Enter Note if necessary
        - e. Fill in Questions as available and needed
        - f. Click Save Changes Button
      2. If No:
        - a. Enter a Note instead of the Date Contacted
        - b. Enter a Follow Up Date if necessary for a reminder
        - c. Click Save Changes Button

## HIRING PROCESS

### HOW TO: REQUEST AN OFFER APPROVAL

After an applicant is evaluated for a position, the designated person can request an offer approval. The Offer Request email can be configured by the Administrator for use.

1. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
2. Go to the Activity Page > Offers Tab
3. Click 'Add New Record' Link
  - a. On the Requisition Details Tab
    - i. Select the Requisition from the Drop-Down List
    - ii. Select the Change Status To from the Drop-Down List
    - iii. Enter the Offer Expires Date (if applicable) Field
    - iv. Enter the Job Start Date Field
    - v. Enter the Starting Salary Field
    - vi. Enter Additional Information as needed or required
  - b. On the Approvals Tab
    - i. Select the Approvers from the Drop-Down Lists
      1. If no Approvers continue on
    - ii. Add any additional Notes in the Text Box provided
    - iii. Check the box to Email the First Approver to start the process
    - iv. Check the box to Email the Recruiter or Hiring Manager as needed
  - c. Click the Save Changes Button

### HOW TO: APPROVE AN OFFER

After the offer approval is generated, the Approver can then view the information and respond accordingly. The Offer Approval email can be configured by the Administrator.

1. The Approver receive the Offer Approval Email
2. Preview the Offer Terms
3. Click the Accept / Deny hyperlink options in the email
  - a. Accept Link
    - i. Send the offer approval request to the next Approver
      1. The Recruiter and Hiring Manager are notified by email of the response
    - ii. The Final Approver completes the process
    - iii. The Activity Page > Offers Tab:
      1. This activity changes from PENDING to APPROVED
  - b. Deny Link
    - i. This stops the approval process
    - ii. The Recruiter and Hiring Manager are notified by email of the response
    - iii. The Activity Page > Offers Tab:
      1. This activity changes from PENDING to DISAPPROVED

### HOW TO: MAKE AN OFFER TO APPLICANT



Offer Letters can be created in Cyber Recruiter as mail merge documents. These documents must be set up prior to using them in this section. The documents can be set under Admin / Page Builder / Correspondence Template.

1. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
2. Go to Activity Page > Offers Tab
  - a. Click the Change link on the Offer Activity that is APPROVED
    - i. Select the Letter template from the drop-down list
    - ii. Click Continue Button
    - iii. Edit & Review the Letter
  - b. Click the Email link on the Offer Activity summary
    - i. Select the Email Template from the Drop-Down List
      1. Use the E-Offer Email for an electronic signature
    - ii. Click the Preview Button
    - iii. Edit & Review the Email
    - iv. Choose other options as needed:
      1. Check the box to 'Copy Me' if you want to be cc'd on the email
      2. Highlight or Add attachments as needed to the Template
      3. Set margin defaults as needed
      4. Click Preview if the Offer Letter should be looked at in final form before sending
    - v. Click Send Button
  - c. Click on the Activity Page > Assigned Reqs Tab
  - d. Click the Applicant Status for the Requisition in progress
    - i. Select the Status in the Drop-Down List
      1. Offer Extended
    - ii. Click Save Changes Button
    - iii. Update Status

## HOW TO: RECORD APPLICANT RESPONSES

When an applicant responds to the offer, the Applicant's status for the requisition is updated and next steps toward hiring the Applicant are considered.

1. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
2. Go to the Activity Page > Assigned Reqs Tab
3. Did the Applicant Accept the Offer?
  - a. If No:
    - i. Click on the Applicant Status for the Requisition in progress
    - ii. Select the Status from the Drop-Down List
      1. Example: Offer Rejected
    - iii. Email the Recruiter or Hiring Manager of status change as needed
      1. Decide if further negotiations are necessary
    - iv. Click Save Change Button
  - b. If Yes:
    - i. Do you have other necessary items to complete prior hiring?
      1. Other forms or paperwork (Testing, Security Clearance, Background, etc...)
        - a. Update the Applicant file via Notes and Attachment Page(s) as necessary
      2. Notify Internal Users who need help in setting up this Applicant (IT, HR, Payroll, etc...)
        - a. Update the Applicant file via Notes as necessary

## HOW TO: ONBOARD APPLICANT (NEW HIRES)

The following process is based off of current client feedback. There are additional emails which can be triggered during this process; however, they are not included in the following steps.

1. Go to Main Menu > Applicant > Process New Hire
2. Find Applicant
  - a. Enter in the information to find the Applicant
  - b. Click the Applicant Name
  - c. Click the Continue button
3. Requisition Details
  - a. Select the Requisition from the drop-down list
  - b. Select the Overall Status from the drop-down list
  - c. Select the Status for the Requisition from the drop-down list
    - i. Change to CLOSED to remove the job from the careers & self service sites.
  - d. Enter the Hire Date
  - e. Select the Cost Type (as needed) from the drop-down list
  - f. Enter the Cost
  - g. Click the Continue Button
4. Applicant Review
  - a. Check the box for each Applicants need to have a status change and/or email notification
    - i. Select the status from the drop-down list
    - ii. Check the Email box to send email
    - iii. Check the 'Remove from all Inboxes' to remove Applicants from all inboxes
  - b. Click the Continue Button
5. If the Email option was selected you will be prompted with the Unhired Applicant Email Template:
  - a. Modify the Email as needed
  - b. Click the Continue Button
  - c. Review the Email
  - d. Click the Continue Button
6. Review Applicant Demographics
  - a. Review the Demographics
    - i. Enter Work Phone Number if applicable
    - ii. Enter Work Email Address if applicable
  - b. Review the EEO information
    - i. Enter Social Security Number (if needed to transfer into the HRIS system)
  - c. Click the Continue Button
7. If the New Hire should receive a final email, you will be prompted with the New Employee Email Template:
  - a. Modify the Email as needed
  - b. Click the Continue Button
  - c. Review the Email
  - d. Click the Continue Button to send
8. Transfer to HR Product – Process is initiated if setup to do so.
  - a. If not, use the HR/Payroll Guide to help walk you through the process

## HOW TO: REMOVE REQUISITION FROM WEBSITES

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### FROM INTEGRATED JOB BOARDS

Job boards integrated with Cyber Recruiter post positions listed in the file that was sent to the Job Board. In order to remove the job posting a new file needs to be sent with all job postings that applicable minus the one that is now CLOSED.

1. Go to the Main Menu Bar > Requisition File or Req List
2. Locate and click on the Requisition Code to enter the Requisition File
  - a. Click the Job Board (CareerBuilder, Dice, HotJobs and/or Monster)
  - b. Click the link at the bottom of the page – Click here to remove it
3. Go to Main Menu Bar > Requisition > Job Boards
  - b. Select the corresponding Job Board
  - a. Select the Company
  - b. Review the File that is going to be sent the Job Board and verify that the requisition just closed is not listed there.
  - c. Click the Submit Button

---

#### FROM NON-INTEGRATED JOB BOARDS

If the job board to post to is not currently a job board integrated with Cyber Recruiter, then the same process the User does now to removed positions applies.

## APPENDIX – ALTERNATIVE PROCESS OPTIONS

Listed below are alternate processes/steps which can be used in the workflow process. Any of these steps can be used in conjunction with or in lieu of a step listed above.

### HOW TO: GENERAL TOPICS

#### ADD A NOTE

1. Select Main Menu Bar > Applicant or Requisition
2. Find desired Applicant or Requisition
3. Click Notes Page:
  - a. Click 'Add New Record' Link
  - b. Select a Note Type
  - c. Enter the Follow Up Date (as needed)
    - i. This puts a task item on the Home Page for the User to follow up on the date entered.
  - d. Enter a the Note
  - e. Highlight Users who should receive this note as needed
  - f. Click Save Changes

#### ADD AN ATTACHMENT

1. Select Main Menu Bar > Applicant or Requisition
2. Find desired Applicant or Requisition
3. Click Attachments Page:
  - a. Click 'Add New Record' Link
  - b. Select an Attachment Type
  - c. Enter a Description (These words entered will be the hyperlink to access the document)
    - i. Applicant Examples (Phone Screen; Interview Eval Form; Background Checking)
    - ii. Requisition Examples (Company Information; Budget Information)
  - d. Browse in the Attachment (the notes you took during the call)
  - e. Select the File Type
  - f. Click Save Changes

#### RESPOND TO ACTIONS VIA HOME PAGE

Emails sent to users (approvals, routings, etc.) will have a duplicated 'action item' showing on the user's Home page. If the user logs into Cyber Recruiter frequently, sometimes it is easier and quicker to respond to the task via the view inside Cyber Recruiter. The following steps can be taken for any action item which appears on the home page.

1. User logs into Cyber Recruiter
2. From the Home Page > Navigate to the section of tasks to review
  - a. Right Click on the task item to review additional information
    - i. Options will change based on the task item to review
  - b. Left Click on the task to take action
    - i. If this action is part of a larger process, it will trigger the next action for the next person
    - ii. Taking action will remove the task from the Home Page

## HOW TO: REQUISITION TOPICS

### CREATE A REQUISITION FROM AN APPROVED TEMPLATE

1. Choose a template to copy from the list available
2. Review and complete all required fields as necessary; required fields will be marked with an \* asterisk
3. Click 'Continue' to continue
  - a. Depending on set-up, there could be one or two pages that contain required fields
4. Review and complete all requested job detail information (job description, requirements, etc...
5. Click 'Continue' to continue
6. Verify all requisition questions to be asked of Applicants when applying to this position
  - b. Click "Add New Record" to include additional questions
  - c. Click the red 'X' to remove questions from the list
7. Click 'Continue'
8. Review and select the necessary Approvers from the drop-down list based on your hierarchy and approval chain
  - a. Enter a note to the Approvers if desired
9. Click 'Save Changes' to complete the process
10. A confirmation page lets you know the process is complete
11. Print the requisition details using the link at the bottom if desired.

### CREATE A REQUISITION FROM EXISTING REQUISITION

1. Choose a requisition to copy from the list available
2. Review and complete all required fields as necessary; required fields will be marked with an \* asterisk
3. Click 'Continue' to continue
  - a. Depending on set-up, there could be one or two pages that contain required fields
4. Review and complete all requested job detail information (job description, requirements, etc...
5. Click 'Continue'
6. Verify all requisition questions to be asked of Applicants when applying to this position
  - d. Click "Add New Record" to include additional questions
  - e. Click the red 'X' to remove questions from the list
7. Click 'Continue'
8. Review and select the necessary Approvers from the drop-down list based on your hierarchy and approval chain
  - b. Enter a note to the Approvers if desired
9. Click 'Save Changes' to complete the process
10. A confirmation page lets you know the process is complete
11. Print the requisition details using the link at the bottom if desired.

### MANUALLY APPROVE A REQUISITION

1. Approver Logs into Cyber Recruiter
2. Find the Requisition if the task item is not listed on the Home Page under 'Requisitions Requiring your Approval Section'
  - a. Find Requisition from Req List or Main Menu Bar > Requisitions > Find Requisition
3. Go into the Requisition File > Approvals Page
4. Click 'Edit' (pencil icon) for the approval level that is being overridden Approver
5. Enter YES/NO in the Approved? Field
6. Enter User password

7. Update the Approval Date as needed
8. If there is another level of approval that needs to be notified upon this manual override, check the box 'Email Next Approver'
9. Add additional information as needed and check the box 'Update Additional Information for all Approvers' if all approvers should know the updated information
10. Click 'Save Changes' to complete the approval

---

## EMAIL APPLICANTS FROM REQUISITION FILE

1. From the Applicants Page, select the Applicants to email:
  - a. Select All link to select all Applicant
  - b. Deselect All link to deselect all the Applicants
  - c. Check the checkbox for individual Applicants as needed
2. Click the Email button
  - a. If you have an Email Template:
    - i. Select 'by choosing an existing correspondence template' option
    - ii. Click Continue Button
    - iii. Select template from dropdown list
    - iv. Click Preview Button
    - v. Review the Email (Subject & Content)
    - vi. Highlight any Attachment from the top left hand box as needed
    - vii. Click Send Button
  - b. If you do not have an Email Template:
    - i. Select 'Typing EMAIL from Scratch' option
    - ii. Click Continue Button
    - iii. Enter Subject & Content of the message
    - iv. Highlight any Attachments from the top left hand box as needed
    - v. Click Send Button

## HOW TO: APPLICANT TOPICS

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### MANUALLY ADD APPLICANTS

1. Recruiter finds the Applicant's information and/or receives the resume
2. Go to Main Menu Bar > Applicants
3. Select Add Applicant
4. Do you have a Formatted Resume?
  - a. If Yes:
    - i. Select From File
    - ii. Browse to the formatted resume
    - iii. Click Continue Button
  - b. If No:
    - i. Select From Clipboard
    - ii. Enter text version of resume if available
    - iii. Click Continue Button
5. Verify that the Contact Information is parsed out correctly
  - a. Do you have a Requisition you are considering this person for?
    - i. If Yes: Select a Requisition from the drop-down list
    - ii. If No: Select an option from the Position Desired field

6. Select an Overall Status for the Applicant (Default is New Applicant)
7. Enter the Application Date (Default is Today's Date)
8. Select the Referral Source from the drop-down list
9. Select the Self Service Status:
  - a. Wizard – to have the Applicant fill out an application
  - b. Normal – Applicant does not have to fill out an application
10. Check to add this Applicant File to your Cyber Recruiter Inbox
11. Click Save Changes
12. Cyber Recruiter runs a duplicate check and if a match is found, did it find a match?
  - a. If Yes: Select the radio button 'Delete the New Record' and do an Applicant > Find Applicant to find the Applicant File in the system.
  - b. If No: Select the radio button 'Keep the New Record' and Click Continue Button
13. Do you want to contact the Applicant?
  - a. If Yes:
    - i. Review and Modify Email
    - ii. Click Send Button
  - b. If No:
    - i. Click Skip this Step Button

---

## FINDING APPLICANTS VIA EMPLOYEE REFERRAL SUBMITTAL

If you are using the Employee Referral feature of the system, the Employees will have the ability to submit referrals via the Self Service Center to positions and/or in general depending on setup. This feature when used, adds a page to the Applicant File for tracking referral information (bonuses, if it is paid out, when hired, what requisitions, etc...) Thus when an Employee Referral is entered into the system whether by an Employee or self-identified by the Applicant, making sure they are properly entered into the Employee Referral area is important for the tracking page.

2. Is the Employee Referral notified by email upon the submittal?
  - a. If Yes: No further action is required until the Employee Referral submits an application like other Applicants.
    - i. You can use the Searching tool for referral source to quickly find anyone who has come in via an employee referral
    - ii. Employee referrals will also appear highlighted in pink throughout the system.
  - b. If No:
    - i. Go to Main Menu Bar > Applicants > Employee Referrals
      1. NOTE: Checking this areas on a regular basis should be built into the recruiting process with this option
    - ii. Find the Referral list
      1. The Status reads 'Referral'
    - iii. Click the Edit (pencil icon) at the front of the referral line
    - iv. Click Transfer to Applicant Database
    - v. Preview / Fill in missing information as needed
    - vi. Click Save Changes
    - vii. The Status now reads 'Applicant'

---

## ROUTE FROM APPLICANT FILE – REQUISITION ATTACHED

1. Enter into the Applicant File (via Inbox, Find Applicant, Home Page, Search Results)
2. Click on the Activity page > Routing Tab
3. Click 'Add New Record' link

4. Highlight the person (or people) who should receive the Applicant routing
  - a. Hold CTRL key down to select individuals
  - b. Hold SHIFT key down to select multiple individuals in a row
5. Add the Applicant(s) to the selected Users' Cyber Recruiter Inbox as necessary
6. Select the appropriate email notification option:
  - a. Allow Response from Email:
    - i. Checked
      1. Recipient can make a decision about the Applicant via the email without logging into Cyber Recruiter and it will update the routing activity.
    - ii. Not Checked
      1. Recipient cannot respond back via the email and must log into Cyber Recruiter and respond via the Home page which will update the routing activity.
  - b. Email Responses Back to Sender:
    - i. Checked
      1. An email is sent to the sender notifying him/her of the response
    - ii. Not Checked
      1. An email is not sent with the response
  - c. Update Applicant's Req Status (only available if sending to one person)
    - i. Checked
      1. The Applicant Status for the requisition is updated in the Applicant File > Activity Page > Assigned Reqs Tab
    - ii. Not Checked
      1. Someone will need to update the Applicant Status for the requisition in the Applicant File > Activity Page > Assigned Reqs Tab
7. Enter a note to the recipient if desired
8. Click Save Change Button

---

## ROUTE FROM APPLICANT FILE – REQUISITION NOT ATTACHED

1. Click on the Activity page > Assigned Reqs Tab
2. Click 'Add New Record' link
3. Select Requisition from the drop-down list
4. Enter Assign Date
5. Select a Status from the drop-down list
  - a. If applicable, check the box to update the Overall Status
6. Highlight the person (or people) who should receive the Applicant routing
  - a. Hold CTRL key down to select individuals
  - b. Hold SHIFT key down to select multiple individuals in a row
7. Add the Applicant(s) to the selected Users' Cyber Recruiter Inbox as necessary
8. Select the appropriate email notification option:
  - a. Allow Response from Email:
    - i. Checked
      1. Recipient can make a decision about the Applicant via the email without logging into Cyber Recruiter and it will update the routing activity.
    - ii. Not Checked
      1. Recipient cannot respond back via the email and must log into Cyber Recruiter and respond via the Home page which will update the routing activity.
  - b. Email Responses Back to Sender:
    - i. Checked
      1. An email is sent to the sender notifying him/her of the response
    - ii. Not Checked
      1. An email is not sent with the response



- c. Update Applicant's Req Status (only available if sending to one person)
    - i. Checked
      - 1. The Applicant Status for the requisition is updated in the Applicant File > Activity Page > Assigned Reqs Tab
    - ii. Not Checked
      - 1. Someone will need to update the Applicant Status for the requisition in the Applicant File > Activity Page > Assigned Reqs Tab
- 9. Enter a note to the recipient if desired
- 10. Click Save Change Button

---

## ROUTE FROM THE CYBER RECRUITER INBOX

- 1. From the Inbox, check the box of the Applicants who should be routed
- 2. Click the Route Button
- 9. Highlight the person (or people) who should receive the Applicant routing
  - c. Hold CTRL key down to select individuals
  - d. Hold SHIFT key down to select multiple individuals in a row
- 10. Add the Applicant(s) to the selected Users' Cyber Recruiter Inbox as necessary
- 11. Select how to notify the selected Users with the following Email option:
  - a. Send separate email for each applicant (Typical Option):
    - i. Sends an email for each Applicant selected and puts an action item on the Home Page
  - b. Send email with all applicants listed Option:
    - i. Sends one email with all the Applicants names listed alerting the User to log into Cyber Recruiter to take further action from the Home Page
  - c. Do NOT Email Option:
    - i. No email is sent but puts an action item on the User's Home Page
- 12. If the 'Send separate email for each applicant' option was selected, then choose the appropriate email notification option:
  - a. Allow Response from Email:
    - i. Checked
      - 1. Recipient can make a decision about the Applicant via the email without logging into Cyber Recruiter and it will update the routing activity.
    - ii. Not Checked
      - 1. Recipient cannot respond back via the email and must log into Cyber Recruiter and respond via the Home page which will update the routing activity.
  - b. Email Responses Back to Sender:
    - i. Checked
      - 1. An email is sent to the sender notifying him/her of the response
    - ii. Not Checked
      - 1. An email is not sent with the response
  - c. Update Applicant's Req Status (only available if sending to one person)
    - i. Checked
      - 1. The Applicant Status for the requisition is updated in the Applicant File > Activity Page > Assigned Reqs Tab
    - ii. Not Checked
      - 1. Someone will need to update the Applicant Status for the requisition in the Applicant File > Activity Page > Assigned Reqs Tab
- 13. Enter a note to the recipient if desired
- 14. Click Save Change Button

---

## ROUTE FROM SEARCH RESULTS

After Applicants are reviewed, the User can elect to send an email to a Hiring Manager (or any User in the system) with the applicant's information and resume. This action will add a routing record to the Applicant File > Activity Page > Routing Tab and History. Additionally, the ability to attach the Applicant to the Requisition is possible.

2. From the Search Results, select the Applicants to route:
  - a. Select All link to select all Applicant
  - b. Deselect All link to deselect all the Applicants
  - c. Check the checkbox for individual Applicants as needed
3. Click the Route button
4. Highlight the person (or people) who should receive this Applicant's information
  - a. Hold CTRL key down to select individual Users
  - b. Hold SHIFT key down to select multiple Users in a row
5. Add the Applicant(s) to the selected Users Cyber Recruiter Inbox if they should be able to access the Applicant files quickly
6. Select how to notify the selected Users with the following Email option:
  - a. Send separate email for each applicant (Typical Option):
    - i. Sends an email for each Applicant selected and puts an action item on the Home Page
  - b. Send email with all applicants listed Option:
    - i. Sends one email with all the Applicants names listed alerting the User to log into Cyber Recruiter to take further action from the Home Page
  - c. Do NOT Email Option:
    - i. No email is sent but puts an action item on the User's Home Page
7. If the 'Send separate email for each applicant' option was selected, then choose the appropriate email notification option:
  - a. Allow Response from Email:
    - i. Checked
      1. Recipient can make a decision about the Applicant via the email without logging into Cyber Recruiter and it will update the routing activity.
    - ii. Not Checked
      1. Recipient cannot respond back via the email and must log into Cyber Recruiter and respond via the Home page which will update the routing activity.
  - b. Email Responses Back to Sender:
    - i. Checked
      1. An email is sent to the sender notifying him/her of the response
    - ii. Not Checked
      1. An email is not sent with the response
  - c. Update Applicant's Req Status (only available if sending to one person)
    - i. Checked
      1. The Applicant Status for the requisition is updated in the Applicant File > Activity Page > Assigned Reqs Tab
    - ii. Not Checked
      1. Someone will need to update the Applicant Status for the requisition in the Applicant File > Activity Page > Assigned Reqs Tab
8. Enter a note to the recipient if desired
  - a. Go to Step 8 to send the routing if a requisition is not needed at this time
  - b. Click the Attach Requisition Tab to add a requisition to the Applicant(s) file
    - i. Select the Requisition from the drop-down list
    - ii. Select the status of the Applicant from the drop-down list
9. Click Save Changes

---

## EMAIL FROM APPLICANT FILE

1. Enter into the Applicant File (via Inbox, Find Applicant, Home Page, Search Results)
2. Click on the Correspondence Page
  - a. If you have an Email Template:
    - i. Select 'by choosing an existing correspondence template' option
    - ii. Click Continue Button
    - iii. Select template from dropdown list
    - iv. Click Preview Button
    - v. Review the Email (Subject & Content)
    - vi. Highlight any Attachment from the top left hand box as needed
    - vii. Click Send Button
  - b. If you do not have an Email Template:
    - i. Select 'Typing EMAIL from Scratch' option
    - ii. Click Continue Button
    - iii. Enter Subject & Content of the message
    - iv. Highlight any Attachments from the top left hand box as needed
    - v. Click Send Button

---

## EMAIL FROM THE CYBER RECRUITER INBOX

1. From the Inbox, check the box of the Applicants who should be emailed
2. Click the Email Button
  - a. If you have an Email Template:
    - i. Select 'by choosing an existing correspondence template' option
    - ii. Click Continue Button
    - iii. Select template from dropdown list
    - iv. Click Preview Button
    - v. Review the Email (Subject & Content)
    - vi. Highlight any Attachment from the top left hand box as needed
    - vii. Click Send Button
  - b. If you do not have an Email Template:
    - i. Select 'Typing EMAIL from Scratch' option
    - ii. Click Continue Button
    - iii. Enter Subject & Content of the message
    - iv. Highlight any Attachments from the top left hand box as needed
    - v. Click Send Button

---

## EMAIL FROM SEARCH RESULTS

1. From the Search Results select the Applicants to email:
  - a. Select All link to select all Applicants
  - b. Deselect All link to deselect all the Applicants
  - c. Check the checkbox individually for Applicants as needed
2. Click the Email Button
  - a. If you have an Email Template:
    - i. Select 'by choosing an existing correspondence template' option
    - ii. Click Continue Button
    - iii. Select template from dropdown list
    - iv. Click Preview Button
    - v. Review the Email (Subject & Content)

- vi. Highlight any Attachment from the top left hand box as needed
- vii. Click Send Button
- b. If you do not have an Email Template:
  - i. Select 'Typing EMAIL from Scratch' option
  - ii. Click Continue Button
  - iii. Enter Subject & Content of the message
  - iv. Highlight any Attachments from the top left hand box as needed
  - v. Click Send Button

---

## DOCUMENT INTERVIEW EVALUATIONS (NOT USING CR'S PROCESS)

1. Not using the Interview Evaluation form?
  - a. Phone calls, meetings, etc...
  - b. Make a decision about the Applicant
  - c. Update Cyber Recruiter as needed:
    - i. Click the Activity Page:
      1. Click on the Applicant Status for the Requisition phone screened
      2. Select the new status from the drop-down list
      3. Enter the Date
      4. Check other boxes as needed
      5. Click Save Changes
    - ii. Add Notes and/or Attachments as needed

---

## RECORD A THIRD-PARTY REFERENCE CHECK

1. Click the Print link on the reference check page
2. Print or Save the Reference Page as needed
3. Send information to the appropriate person(s) to do the reference check
4. When the check is completed update Cyber Recruiter as needed

---

## RECORD REFERENCES OUTSIDE THE REFERENCE PAGE

1. Not Using the References Page?
  - a. Notes Page:
    - i. Click 'Add New Record' Link
    - ii. Select the Note Type (Example: Reference Check)
    - iii. Call the Reference
      1. Enter Notes as needed
    - iv. If Applicant is not available
      1. Enter the Follow-Up Date of when to try again next
    - v. Highlight Users who should receive this note if necessary
    - vi. Click Save Changes Button
  - b. Click Attachments Page:
    - i. Click 'Add New Record' Link
    - ii. Select an Attachment Type
    - iii. Enter a Description (Reference Check)
      1. The as you type it in, will be the hyperlink to the document
    - iv. Browse in the Attachment
    - v. Select the File Type

- vi. Click Save Changes

---

## MANUALLY APPROVE AN OFFER REQUEST

1. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
2. Go to the Activity Page > Offers Tab
  - a. Click the Edit Link for the Offer Activity with the PENDING status
  - b. Scroll down to the Approver Section
  - c. Click Edit link for the Approver who needs to the manual override
    - i. Select Accept Link
      1. Send the offer approval request to the next Approver
      2. The Recruiter and Hiring Manager are notified by email of the response
      3. The Final Approver completes the process
      4. The Activity Page > Offers Tab:
        - a. This activity changes from PENDING to APPROVED
    - ii. Select Deny Link
      1. This stops the approval process
      2. The Recruiter and Hiring Manager are notified by email of the response
      3. The Activity Page > Offers Tab:
        - a. This activity changes from PENDING to DISAPPROVED
  - d. Click Save Changes Button

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## MAKE AN OFFER VIA PHONE

1. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
2. Add Notes on the Applicant File > Notes Page
  - a. Click 'Add New Record' Link
  - b. Select a Note Type
  - c. Enter the notes from the Interview
  - d. Highlight Users who should receive this note if necessary
  - e. Click Save Changes

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## MANUALLY PROCESS A NEW HIRE

These steps walk the User through making the Applicant an Employee in the system and close out the Requisition and other steps as needed.

1. Go to the Applicant File (via Find Applicant, Inbox, Search Applicant, or Last Applicant)
2. Go to the Activity Page > Assigned Reqss Tab
3. Click on the Applicant Status for the Requisition in progress
  - a. Select the HIRED Status from the Drop-Down List
    - i. Check to box to update the overall status
    - ii. Check the box to close the requisition (if this was not done in the previous step)
    - iii. Email the Recruiter or Hiring Manager of status change as needed
  - b. Click Save Change Button
4. Does someone internally need to be notified?
  - a. If Yes: Click the Notes Page
    - i. Click 'Add New Record' link

- ii. Select the Note Type from the drop-down list
  - iii. Enter the Note Date
  - iv. Select the User who needs to get the note
  - v. Enter the Note in the Text Box
  - vi. Click the Save Changes Button
- 5. Do other Applicants need to be emailed or updated?
  - a. Go to the Activity Page > Assigned Reqss Tab
  - b. Click on the Requisition Code/Title
  - c. Go to the Applicants page
    - i. To Update Statuses:
      - 1. Check the box for all Applicants who should have the same status
      - 2. Click the Change Status button
        - a. Select new status from the drop-down list
          - i. Example: Position Filled
        - b. Enter the Date for the Status
        - c. Check the box to email the Recruiter or Hiring Manager as needed
        - d. Click the Save Changes Button
        - e. Repeat for other groups of Applicants as needed if not all of them are selected for the same status
    - ii. To Send an Email:
      - 1. Check the box for all Applicants who should receive an email
      - 2. Click the Email Button
        - a. If you have an Email Template established:
          - i. Select 'by choosing an existing correspondence template' option
          - ii. Click Continue Button
          - iii. Select template from dropdown list
          - iv. Click Preview Button
          - v. Review the Email (Subject & Content)
          - vi. Highlight any Attachment from the top left hand box
          - vii. Click Send Button
        - b. If you do not have an Email Template:
          - i. Select 'Typing EMAIL from Scratch' option
          - ii. Click Continue Button
          - iii. Enter Subject & Content of the message
          - iv. Highlight any Attachments from the top left hand box
          - v. Click Send Button
- 6. Do costs need to be associated to the Requisition?
  - a. Go to the Costs Page
  - b. Click 'Add New Record' Link
    - i. Select Cost Item from the drop-down list
    - ii. Enter Date of expense
    - iii. Enter Amount of expense
    - iv. Enter note, if applicable
    - v. Check the box to Email the Recruiter or Hiring Manager as needed
    - vi. Click Save Changes Button
- 7. Do New Hires need to be transferred to a HRIS system?
  - a. Consider the HR/Payroll Manual located in Help > User Manuals to follow the right process for the right HRIS system.