HR Administrators

Basic Training Exercises

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1 INTRODUCTION

At this stage, you should have received your preliminary training on your new online recruitment system.

The exercises in this document have been created to familiarise you with the system's basic functionality, such as adding new jobs onto your website, adding new job related questions to a form etc.

Please bear in mind that whilst the system is in test mode (i.e. prior to launch) you can add as many dummy forms, jobs, candidates etc. as you like. Our staff will erase all test data before the live date, so please feel free to play with the features as much as you like.

When you're ready, login to the system and begin.

We have provided a set of User Guides separately, so please refer to the relevant User Guide during the exercises if you need to (*e.g. Workflow Library User Guide, Email Library User Guide etc.*).

2 WORKFLOWS

Access the Workflow Library (*Libraries > Workflow Library*) and:

1. **Copy an External Workflow and rename for a new job role**
2. **Click & Edit your newly copied workflow and add a new stage to the Candidate Stages called 'About You'**
3. **Edit the About You stage and add some new components, as if you are asking some job related questions**
4. **Preview your new workflow (to see the candidate application form)**

3 EMAILS

Access the **Email Library** (*Libraries > Email Library*) and:

1. **Click any template and Preview the email**
2. **Click any template and Copy the email using a fake email template name**
3. **Click & Edit your newly copied email template and change some working using the Template Content tab**
4. **Attach a file using the Files Attachments tab**

3 VACANCIES

Access the **Vacancy Listing** (*Vacancies Tab*) and:

1. **Click any vacancy (*not 'Talent Bank Registration'*) and Copy using a fake job title**
2. **Click & Edit your newly copied vacancy and amend details on the first few tabs & save (your vacancy will be in the 'Incomplete' tab of the vacancy listing)**
3. **Click & Edit your newly copied vacancy and allocate a Hiring Manager**
4. **Allocate an External Workflow and an Internal Workflow to your vacancy**
5. **Add your own Website to the Sources of your vacancy**
6. **Add a Job Description to your vacancy then Save & Return**
7. **Click your vacancy in the 'Incomplete' tab and then 'Activate'**
8. **Your job should be visible on the career site**

4 USERS

Access the **Account User Listing** (*Settings Tab*) and:

1. Click Add New User and create a new dummy HR user (tick all boxes then save)
2. Click Add New User and create a new dummy Hiring Manager user (choose Basic User then tick the Screening & Request Vacancy boxes then save)
3. In the listing, click one of your new users and then Disable their login, then Enable their login)
4. When you have finished, click Remove to take your fake users off the system altogether

5 SUPPORT

If you have any questions or would like to arrange for a personal phone based training session, please contact us at support@reach-ats.com

