HRM instruction

Content:

Section 1. Vacancies

1.1 Job creation
- Add job title
- Select Responsible recruiter (Directory "Contacts")
- Select Candidate Processing Algorithm (Directory "Candidate Processing Algorithm").

Candidate processing algorithm - according to the Candidate processing algorithm, the system will determine which case to run for a particular record.

Candidate status - the value of the Status field will determine the steps of the case (the life cycle of the candidate).

Candidates: Cases

SAVE   CANCEL   <   SECTION   CASES   BUSINESS PROCESSES   >

Which column to build the stages by?*

State

Which column determines which case to use with a record?

Algorithm of candidate processing

NEW CASE   ACTIONS ▾   VIEW ▾

☑ Active   🔲 Filters/folders ▾

Case 3 (Hiring a Sales Manager)	Stage column State	Active Yes	Created on 8/16/2022 4:01 PM
Start condition Algorithm of candidate processing = Recruitment of sales manager			
Case 1	Stage column State	Active Yes	Created on 8/16/2022 4:01 PM
Start condition Algorithm of candidate processing = Recruitment of accountant			
Case 2 (hiring IT)	Stage column State	Active Yes	Created on 8/16/2022 4:01 PM
Start condition Algorithm of candidate processing = Recruitment of IT specialist			

- In the Vacancy Information tab, fill in the vacancy information (Employment Type, Vacancy Client, Salary, Opening Date, Division, Position, Full Name of the Position).

<   WORK WITH CANDIDATES   JOB INFORMATION   MORE ABOUT THE VACANCY   TASKS AND CONNECTIONS   INTERVIEWS   FILES   RESULTS ENG.   RESULTS 2   FEED   >

Vacancy information

Employment type	Full time	Subdivision	Finances
Vacancy client	ДЗАНЕЛЛІ АЛЕССАНДРО	Position	Accountant
Salary	20,000.00	Position full name	

- In the Information about the vacancy tab, add areas in which it is possible to search for candidates, as well as areas, candidates from which we do not consider

Job search areas + ⋮

Country	State/province	City	Exclude from selection
Ukraine	Vinnytsia Oblast	Vinnitsa	Yes
Ukraine	Chernihiv Oblast	Chernigov	No

- In the Information about the vacancy tab, fill in the Requirements for the candidate (Job experience, Education, Gender, Age from, Age before, Ready for trips).

Requirements for a candidate

Job experience	0.5 year	Age from	18
Education	Higher	Age before	60
Gender	Female	Ready for trips	☐

- In the Job Information tab, enter the required number of candidates

Vacancy analytics

Requied candidates amount   3

- Enter information about the Terms of work with the vacancy: Opening date and Planned closing date. The days left (until the vacancy closes) are automatically calculated by the system.

Time frames				
Days left	6		Created on	8/22/2022	2:33 PM
Opening date	8/22/2022		Modified on	8/22/2022	3:04 PM
Planned closing date	8/29/2022		Actual closing date		

- In the Additional tab about the vacancy, fill in the information about Responsibilities, Expectations from the candidate, We are ready to offer.

Responsibilities	Qualitative and timely preparation and submission of statistical, financial, tax and other reports, including reports and other necessary documents from NEC «Ukrenergo», Guaranteed Buyer and NKREKP Maintenance of all areas of accounting and the order of registration of operations and the organization of document circulation by sections of accounting
Expectations	Higher profile education; Experience as chief accountant from 3 years (preferably in a similar field); Knowledge of English at a level not lower than Upper Intermediate Excellent knowledge of all areas of accounting;
What we offer	If you become a team member of our small company, you would keep records in Quickbooks Online and also prepare annual income tax declarations for US individuals and companies (1040,1120S, 1065, 100S, 540, 565 etc).

- In the Tasks and Relations tab, enter the Counterparty (the company for which we select candidates) and Contact (the contact person from this company).

1.2 Approval of the vacancy

To agree and approve a vacancy, use the approval functionality.

- To approve a vacancy in the Vacancies card, click on Run process, select Contract Approval.

- The notification "New approval" pops up

All ▼ ☐ Show future tasks

🗲 Today at 4:12 PM
👤 New approval
Contract approval

- Select the Approver, specify the Approval objective, check the Delegation allowed checkbox, if the approver can delegate the process of approving the vacancy.

New approval

SAVE   CLOSE

Approver* Supervisor

Approval objective   Approve the vacancy   🎤

Delegation permitted   ☐

- The approver is notified of the need to approve the vacancy, and the activity is set.

Accountant

SAVE   CANCEL   ACTIONS ▼   🏷   ⊙ RUN PROCESS ▼

New   Declined   Searching for candidates

NEXT STEPS (2)   📞   ✉   💬   🚩   💬   ✈   💬

Approve the vacancy

8/22/2022 │ Supervisor   ☑

- In the Vacancies card, in the Approvals tab, all visas for this vacancy are displayed.

Approvals   ⋮   ☐ Waiting for my approval

Approval purpose	Approver	Delegation permitted	Delegated from
Approve the vacancy	Supervisor	Yes	

1.3 Adding candidates for a vacancy

In the Candidates tab, add candidates for the position for this vacancy.
When adding a new candidate, a new Candidate card opens, which should be filled out.
When adding candidates from the list, the system offers to select a candidate from already existing entries in the Candidates section.

Candidates + ⋮

Full name		Gender	Vacancy
	Add new candidate		
Hope Maikolso...	Add candidates from the list	Female	Accountant

1.4 Selection of candidates for the vacancy

● To designate a candidate as a potential recruiter, the Short list checkbox and Save changes should be checked in the Candidate card.

Hope Maikolson

SAVE   CANCEL   ACTIONS ▾   🔖   SCHEDULE AN INTERVIEW

HRM ▾

- 👥 Candidates
- 📓 Vacancies
- 🚩 Activities
- 📞 Calls
- 👤 Contacts
- 📇 Accounts
- 🔍 Lookups
- 💬 Feed
- @ Message templates
- 📇 Employees

New > Testing

NEXT STEPS (1)   📞   ✉   💬   🚩

Control of all interviews

8/17/2022 | Supervisor

Full name
Hope Maikolson

Name
Maikolson

Main phone
0665252536

Email

Full years
18

Candidate's city
Atlanta

Vacancy
Accountant

Contact

Short List
☑

Candidate's full name   Hope Maikolson
Surname   Hope
Middle name

< MAIN INFORMATION   FILES AND NOTE

Candidate's city   Atlanta
Full years   18
Gender   Female
Education   Higher
Cause of rejection

Short resume

- After that, this candidate goes to the Vacancy in the Candidate short list detail

1.5 Appointment of interviews

- In the Vacancies card, in the Interviews tab, you need to add an interview, fill in the information: who Conducts the interview, interview Duration, Description

- After creating an interview in the Vacancy, you should open the card of the desired Candidate and click on the "Schedule An Interview" button

The system will create activity for this candidate.

A notification will pop up asking you to conduct an interview.
- After the interview, in the Activity card, you must set the assessment of the interview.

- In the Vacancies card, in the Tasks and Connections tab, the system automatically displays the history of Activities for this vacancy


Section 2 Candidates

2.1 Adding (creating) a candidate

- In the Candidates section, click on the "NEW" button
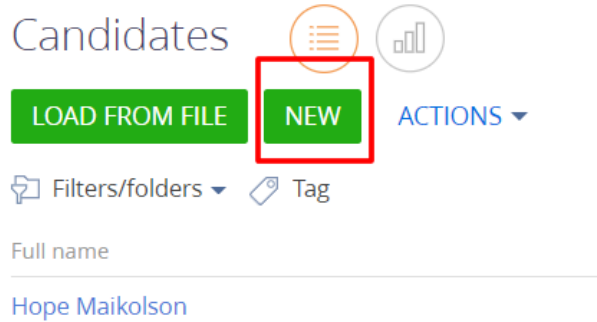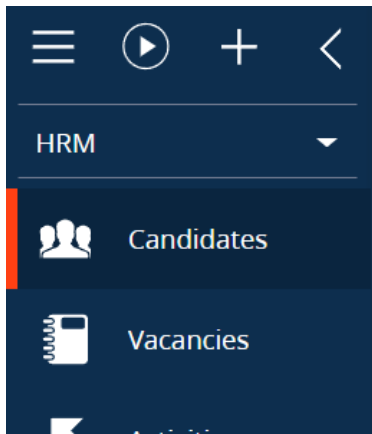
- **Fill in information about the candidate:**
→ Full name, surname, first name,
→ Algorithm of candidate processing (mandatory field)
→ Responsible recruiter
→ City
→ Date of Birth
→ Full years (the system calculates automatically)
→ Education
→ Desired Salary
→ Candidate Source
→ Reason for leaving
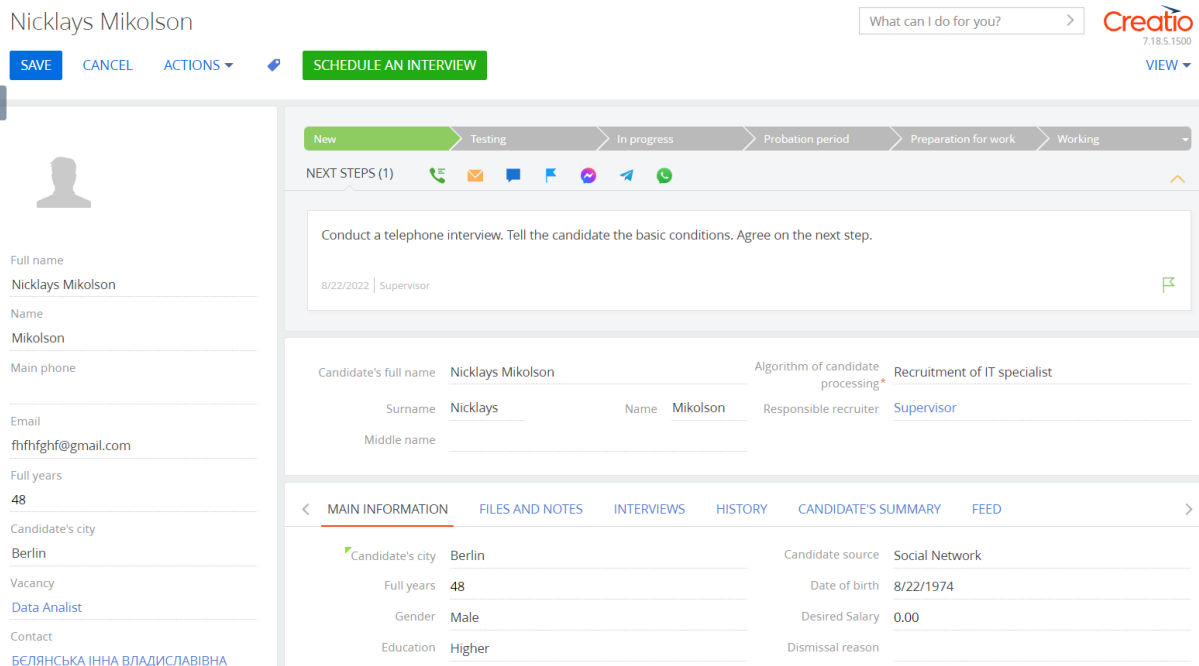
- Short resume
- Candidate communication

Short resume

Candidate communications + ⋮

Candidate Contacts	Type
fhfhfghf@gmail.com	Email

- In the Files and Notes tab, add a link to the candidate's resume or upload the resume as a file

| ‹ | MAIN INFORMATION | FILES AND NOTES | INTERVIEWS | HISTORY | CANDIDATE'S SUMMARY | FEED | › |

Attachments 📎 ⋮ ≣ ⊞ [Add link]

Name	Description ^	Type	Created on	Created by
████████_13-11-2021.pdf		File	8/22/2022 7:08 PM	Supervisor
Resume	summary	Link	8/22/2022 7:07 PM	Supervisor

- Enter data from the candidate's Summary: Employment type , for which position he/she is applying, Years of job experience, Computer skills, Professional and other skills, Language skills

| ‹ | MAIN INFORMATION | FILES AND NOTES | INTERVIEWS | HISTORY | CANDIDATE'S SUMMARY | FEED | › |

Competence

Employment type	Full time	PC skills	all
Position	CEO	Professional and other skills	all
Job experience	5+ years	Language skills	good job

2.2 Candidate life cycle (working with a candidate)

Depending on the Algorithm of candidate processing, the Candidate card displays a status bar and a list of certain stages. At the transition to each stage, the recruiter is given a task.

To set up the sequence and content of steps for a specific Algorithm of candidate processing, create a new case in the Case Wizard.

Add case launch conditions.

Case ⓘ ✕

Case 3 (Hiring a Sales Manager)

Section*
Candidates

Stage column*
State

Description
Актуализация

Version
0

Code*
BtcCase_5ef427f

Use this case with records where:*

Algorithm of candidate processing   =
Recruitment of sales manager

Other properties

Package*
BtechHRM

Link to process in Studio Free
⬚

☑ Active

Define case stages, set stage parameters, set activities for each stage of the status bar.

- If the candidate is denied the position (transferred to the Rejection stage), indicate the reason for the Refusal.

2.3 Create an employee card

If the candidate is hired, create an employee card. To do this, in the employee card, click on Actions, select Create Contact.

The system will automatically create a Contact and notify you about it.

Fill in the Contact card: pull up the Counterparty, specify the Position.