

HRM instruction

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Section 1. Vacancies

1.1 Job creation

- Add job title
- Select Responsible recruiter (Directory “Contacts”)
- Select Candidate Processing Algorithm (Directory “Candidate Processing Algorithm”).

The screenshot displays a recruitment system interface. At the top, a progress bar shows stages: New (highlighted), Declined, Searching for candidates, Long list, Postponed, and Canceled. Below this, a 'NEXT STEPS (1)' section contains a list of communication icons. The main form area includes a note: '* Fill in all the fields in the "Basic information" block in the application'. A date field shows '8/22/2022' and a supervisor field shows 'Supervisor'. The form fields are: Name* Accountant, Status* New, Responsible recruiter (empty), Candidate processing algorithm Recruitment of accountant, and a bottom navigation bar with options: WORK WITH CANDIDATES, JOB INFORMATION, MORE ABOUT THE VACANCY, TASKS AND CONNECTIONS, INTERVIEWS, FILES, RESULTS ENG., RESULTS 2, FEED. Below the navigation bar, there are two buttons: 'Candidates + ⋮' and 'Object ⋮'. The text 'No data' is visible in the center of the page.

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

| Case Name | Stage column | State | Active | Created on |
|---------------------------------|--------------|-------|--------|-------------------|
| Case 3 (Hiring a Sales Manager) | State | State | Yes | 8/16/2022 4:01 PM |
| Case 1 | State | State | Yes | 8/16/2022 4:01 PM |
| Case 2 (hiring IT) | State | State | Yes | 8/16/2022 4:01 PM |

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

Vacancy information

Employment type: Full time Subdivision: Finances

Vacancy client: ДЗАНЕЛІІ 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

| 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

Required 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.

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

| | |
|------------------|--|
| 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).

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




Company _____ Contact _____

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.








Accountant

SAVE CANCEL ACTIONS   RUN PROCESS 

RUN PROCESS BY RECORD

Contract approval

New Declined

NEXT STEPS (1)       

- 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 |
|----------------|--------|------------|
| Hope Maikolson | 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.

The screenshot displays the 'Candidate card' for Hope Maikolson. On the left, a dark blue navigation sidebar lists various HRM functions, with 'Candidates' selected. The main content area shows the candidate's profile with the following details:

- Full name:** Hope Maikolson
- Name:** Maikolson
- Main phone:** 0665252536
- Email:** (empty field)
- Full years:** 18
- Candidate's city:** Atlanta
- Vacancy:** Accountant
- Contact:** (empty field)
- Short List:** (indicated by a red arrow)

At the top of the card, there are buttons for 'SAVE', 'CANCEL', 'ACTIONS', and 'SCHEDULE AN INTERVIEW'. Below these, a 'NEXT STEPS (1)' section shows a task: 'Control of all interviews' with a due date of '8/17/2022' and assigned to 'Supervisor'. The bottom right of the card shows a 'Short resume' button.

- 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

| Number | Conducts an interview | Job title | Description | Interview duration (hour) |
|--------|-----------------------|------------|-------------|---------------------------|
| 1 | Andrew Baker (sample) | Specialist | | 1 |

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

Hope Maikolson

What can I do for you?

CLOSE

ACTIONS

SCHEDULE AN INTERVIEW



Full name

Hope Maikolson

Name

Maikolson

Main phone

0665252536

Email

Full years

18

Candidate's city

Atlanta

Vacancy

Accountant

Contact

CAUSE OF REJECTION

New Testing In progress Probation period Preparation for work

NEXT STEPS (1)

Control of all interviews

8/17/2022 | Supervisor

Candidate's full name Hope Maikolson

Algorithm of candidate processing* Recruitment of account

Surname Hope

Name Maikolson

Responsible recruiter Supervisor

Middle name

MAIN INFORMATION

FILES AND NOTES

INTERVIEWS

HISTORY

CANDIDATE'S SUMMARY

FEED

Candidate's city Atlanta

Candidate source Newspaper advertisement

Full years 18

Date of birth 5/17/2004

Gender Female

Desired Salary 500.00

Education Higher

Dismissal reason

Cause of rejection

The system will create activity for this candidate.

Hope Maikolson

What can I do for you? > Creatio 7.18.5.1500 VIEW

CLOSE ACTIONS SCHEDULE AN INTERVIEW

New Testing In progress Probation period Preparation for work Working

NEXT STEPS (2)

Conduct an interview. Candidate : Hope Maikolson

Submit a test task

8/22/2022 | Andrew Baker (sample) 8/22/2022 | Supervisor

Full name Hope Maikolson

Name Maikolson

Main phone 0665252536

Email

Full years 18

Candidate's city Atlanta

Candidate's full name Hope Maikolson

Algorithm of candidate processing* Recruitment of accountant

Surname Hope Name Maikolson Responsible recruiter Supervisor

Middle name

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

Candidate's city Atlanta

Candidate source Newspaper advertisement

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.

Conduct an interview. Candidate : Hope Maikolson

What can I do for you? > Creatio 7.18.5.1500 VIEW

SAVE CANCEL ACTIONS

Subject* Conduct an interview. Candidate : Hope Maikolson

Start* 8/22/2022 5:38 PM

Due* 8/22/2022 6:38 PM

Status* Not started

Show in calendar

Interview evaluation 10

Role

Reporter* Supervisor

Priority* Medium

Category* Interview

Owner Andrew Baker (sample)

GENERAL INFORMATION PARTICIPANTS ATTACHMENTS AND NOTES EMAIL FEED CALLS

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

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

Company Contact

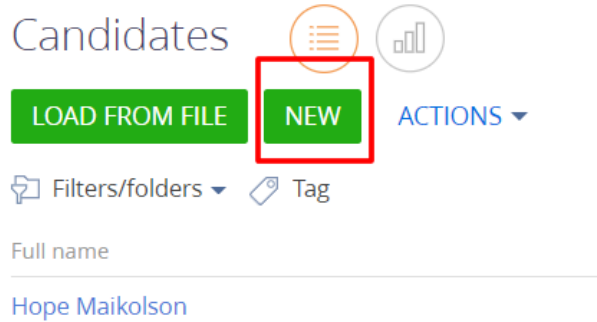
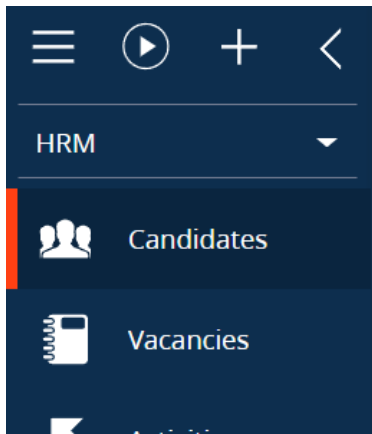
Activities + :

| Subject | Start | Due | Priority |
|--|-------------------|-------------------|----------|
| Create vacancies on the resources work.ua and rabota.ua | 8/22/2022 4:23 PM | 8/22/2022 4:43 PM | Medium |
| Conduct an interview. Candidate : Hope Maikolson | 8/22/2022 5:38 PM | 8/22/2022 6:38 PM | Medium |
| Fill in all the fields in the "Basic information" block in the application | 8/22/2022 2:33 PM | 8/22/2022 2:53 PM | Medium |

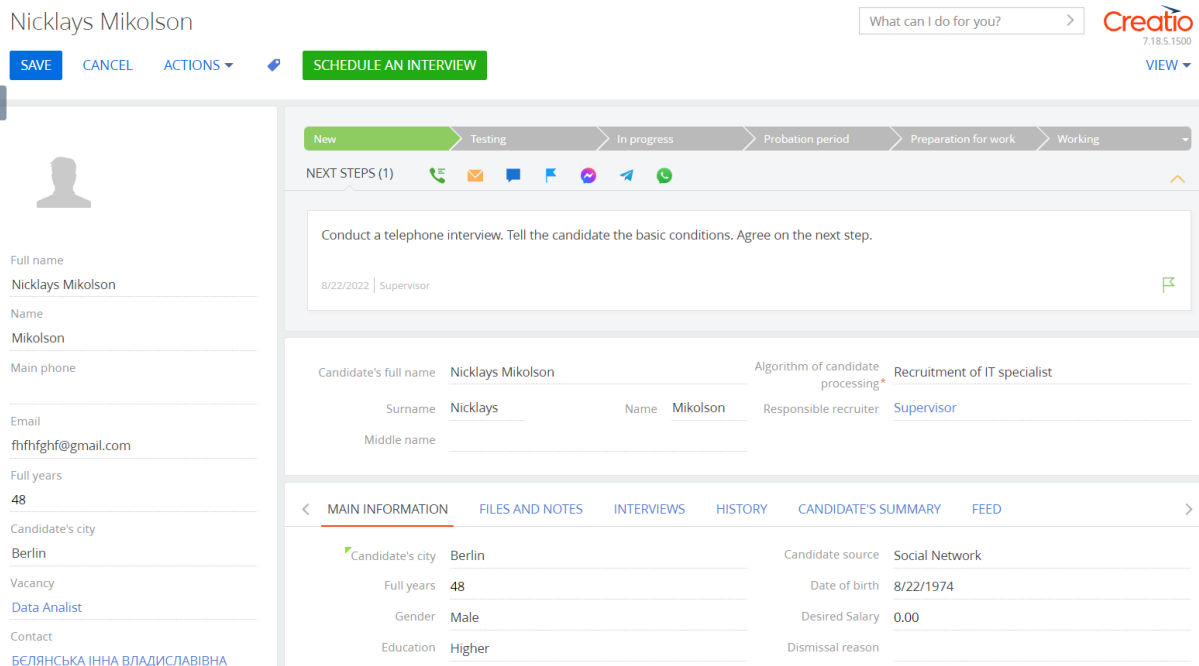
Section 2 Candidates

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

fhhfghf@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.

CLOSE ACTIONS SCHEDULE AN INTERVIEW

The screenshot shows a candidate record for Nicklays Mikolson. At the top, a process flow bar is highlighted with a red box, showing stages: New (active), Testing, In progress, Probation period, Preparation for work, and Working. Below this, a 'NEXT STEPS (1)' section contains a task: 'Conduct a telephone interview. Tell the candidate the basic conditions. Agree on the next step.' with a date of 8/22/2022 and assigned to a Supervisor. The candidate details section includes: Candidate's full name: Nicklays Mikolson; Algorithm of candidate processing: Recruitment of IT specialist (highlighted with a red box); Surname: Nicklays; Name: Mikolson; Responsible recruiter: Supervisor.

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

Candidates: Cases

The screenshot shows the 'Candidates: Cases' configuration page. At the top, there are 'SAVE' and 'CANCEL' buttons, and a breadcrumb trail: SECTION > CASES > BUSINESS PROCESSES. A red arrow points to the 'NEW CASE' button. On the left, there are two configuration questions: 'Which column to build the stages by?*' with a dropdown set to 'State', and 'Which column determines which case to use with a record?' with a dropdown set to 'Algorithm of candidate processing'. On the right, there are two case entries: 'Case 3 (Hiring a Sales Manager)' with a start condition 'Algorithm of candidate processing = Recruitment of sales manag' and 'Case 1' with a start condition 'Algorithm of candidate processing = Recruitment of accountant'.

Add case launch conditions.

Case (i) >

>> 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.

Hope Maikolson

What can I do for you? >

Creatio
7.18.5.1500

SAVE

CANCEL

ACTIONS ▾

SCHEDULE AN INTERVIEW

VIEW ▾

Progress bar: New → Testing → In progress → Probation period → Preparation for work → Working

NEXT STEPS (1)

Submit a test task
8/22/2022 | Supervisor

Candidate's full name: Hope Maikolson
Surname: Hope | Name: Maikolson
Algorithm of candidate processing*: Recruitment of accountant
Responsible recruiter: Supervisor

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

Candidate's city: Atlanta
Candidate source: Newspaper advertisement
Full years: 18
Date of birth: 5/17/2004
Gender: Female
Desired Salary: 500.00
Education: Higher
Dismissal reason:
Cause of rejection: my bad

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.

Nicklays Mikolson

CLOSE

ACTIONS ▾

SCHEDULE AN INTERVIEW

Follow the feed

Create contact

Conduct a telephone interview. Tell

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

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