CAPPS HR/PAYROLL
End-User Training (EUT)

EUT Course - 115

CAPPS Recruit

Taleo 20D.0.4 and
PeopleSoft 9.2

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Requisition List and File

Section 2, Lesson 1 Exercise - Scenario 1: Requisition List and File

Procedure

In this lesson, you will learn how to view the Requisition List and the details of a Requisition File.

Step 1. You can access Recruiting by selecting **Recruiting** in the **Menu Bar** or from the **Centers** link.

Step 2. Click the **Recruiting** link.

Step 3. You will use this Requisitions Link in the Core Navigation Bar.

Click the **Requisitions** link.

Step 4. You can create a requisition from within this page by selecting the **Create Requisition button**.

Step 5. This section is the **Requisition List.** This list is used to search, edit, print, add comments, and/or change the status of requisitions that you may own or with which you may collaborate ownership.

Step 6. A flag icon next to a Requisition represents items that you own that requires your attention.

Step 7. A **Person (count)** icon next to a Requisition represents how many candidates applied to the requisition.

Step 8. The title of the **Requisition** is listed along with the assigned **Requisition ID#** and **Status** of the requisition.

Step 9. An arrow changes the **Requisition ID** list to **Ascending** or **Descending** order.

Step 10. Click the scrollbar.

Step 11. The **Envelope** icon indicates the number of candidates who received a job posting notification.

Step 12. The star indicates that the **ACE** option has been applied to this requisition.

Step 13. This is a **Prevent Posting** icon. You will see this icon when there is a requisition that is saved as a Draft and moved into a Prevent Posting status due to the agency deciding not to move forward with the requisition.

Step 14. This status can be changed to use the requisition later.

Step 15. The **Recruiter** and **Hiring Manager** who were assigned to the Requisition are also listed.

Step 16. Click the scrollbar.

Step 17. To open up a requisition file, click on the requisition title. This requisition is in **Draft** status.

Step 18. Click the **Manager II** link.

Step 19. A Requisition file details the specific requirements for a job position. It contains several sections that are available for viewing and/or editing:

- i. Requisition Structure
- ii. Process
- iii. Job Information
- iv. Budget
- v. Job Description
- vi. Questionnaire

Step 20. To view the remaining sections,

Click the **Vertical Scrollbar**.

Step 21. The arrows expand each section. These sections will be covered under the **Create Requisition** topic.

Step 22. Click the scrollbar.

Step 23. Click the **Prescreen Alerts** tab.

Step 24. The **Prescreen Alerts** will flag submissions that meet all the required criteria in addition to Assets that have been set.

Step 25. Click the **Attachments** tab.

Step 26. **Attachments** can be uploaded and will be available for anyone with access to this requisition.

Step 27. Click the **Sourcing** tab.

Step 28. The **Sourcing** tab is where you will post the job.

Step 29. Click the **History** tab.

Step 30. The **History** tab tracks the activity for the requisition.

Step 31. Click the **Requisition Info** option.

Step 32. The left pane contains the **Requisition** in the top section.

Step 33. The Requisition Status, Last Action, and Number of Hired Candidates are displayed.

Step 34. Within the **Summary** section, the number of Active Candidates indicates candidates that submitted their profile and was reviewed by the Recruiter.

Step 35. The Recruiter also updated the status of the candidate.

Step 36. Clicking on the number of Active Candidates will open up the Candidate's list.

Step 37. The **New Candidates** number indicates candidates who are in the step HR Screen.

Step 38. Clicking on the number of New Candidates will open up the Candidate's list.

Step 39. This is the **Structure** section of the requisition.

Step 40. There will be links to the sections that you can click on instead of scrolling through the requisition.

Step 41. Click the scrollbar.

Step 42. The **Hiring Team** section provides information about the Recruiter, Hiring Manager and Name of the Agency.

Step 43. The **Job Information** section provides information about the Employee Status and Compensation.

Step 44. Click the scrollbar.

Step 45. Click the **Back to Requisition List** button.

Step 46. The **Filters** panel enables the user to filter by ownership values as well as requisition status.

Step 47. Click the **Show Requisitions** button.

Step 48. You can filter in order to show requisitions by the following designations:

...I own

...I collaborate on

...I own or collaborate on

...Agency Name

...All requisitions

Step 49. The **Include inactive requisitions** option is used to include requisitions that have been cancelled.

Step 50. Click the **Requisitions Expand** button.

Step 51. You are able to filter by the **Requisition Status** of requisitions within this section as well.

Step 52. Click the **Recruiting** link.

Step 53. Congratulations! You have completed this lesson.

Creating a Requisition

Section 2, Lesson 1 Exercise - Scenario 2: Creating a Requisition

CAPPS Recruiting users have the ability to create requisitions to detail the specific requirements for a job position. Requisition creation is done via the Create Requisition button which is available in the Requisitions channel as well as in the Requisitions page. This button is available to users if they have been granted the appropriate permissions.

A Requisition Template must be selected when creating a Requisition. This template populates many of the critical fields within the requisition. Some may require changes. Other fields within the requisition must be entered manually.

Users can decide if they need to Save the Requisition for now, and then come back to it in order to make Edits and/or Request Approval. When the requisition is saved, the status will remain "Draft". When you request an Approval, the status changes to "Pending".

Procedure

In this lesson, you will learn how to Create a Requisition.

In this scenario, you will be creating a requisition using the Manager II requisition template.

Step 1. Click the **Recruiting** link.

Step 2. Click the **Requisitions** link.

Step 3. Click the **Create Requisition** button.

Step 4. Click the scrollbar.

Step 5. Click the **Next** button.

Step 6. You will search for the Manager II template from the templates that are available.

Step 7. Click the **Open Selector** button.

Step 8. If you want to review the details of the requisition template, you can select the name of the Requisition.

Step 9. Click the **Manager II** link.

Step 10. Click the **Close Tab (Ctrl+W)** button.

Step 11. Click the **Select** link.

Step 12. Click the **Next** button.

Step 13. The **Organization, Location,** and **Job** fields populate based on the Position Data setup in CAPPS HR/Payroll.

Step 14. You are able to change the **Business Unit** and/or **Department** as needed.

Step 15. You will enter the **Hiring Manager** in this field or you can skip this field and enter it further down the requisition.

Step 16. Click the **Next** button.

Step 17. It is recommended that you put the agency acronym in front of the Req Title so applicants know the agency in which they are applying.

Step 18. In training, you won't change the title name.

Step 19. If there is more than one opening for this requisition, you would change the number of openings.

Step 20. You will select the appropriate justification for the requisition. The most commonly used is **New** or **Replacement.**

Step 21. Click an entry in the list.

Step 22. Click the **New Position** list item.

Step 23. You can change the retain Job Requisition to Yes, if you need to retain the requisition longer than your retention schedule.

Step 24. Click the scrollbar.

Step 25. Additional State Job Codes can be entered, if needed.

Step 26. The O*NET Code comes from the Job Code table.

Step 27. The Position Number field only accepts eight (8) characters. You can use the Position Details field below for additional information.

Step 28. Click the scrollbar.

Step 29. There is a modify structure link that allows you to make changes to Organization, Location, and/or the Job Field.

Step 30. Click the scrollbar.

Step 31. The Recruiter name is a required field and is defaulted according to the User.

Step 32. The recruiter listed here is the person that is creating the requisition.

Step 33. The Hiring Manager is also a required field. You already entered the Hiring Manager above, so it populated here.

Step 34. The **Assistant** fields are not required. However if you assign an Assistant in either case, the system will send emails notifying the Assistants first.

Step 35. All four (4) people in the **Owners** section are considered Owners of the requisition.

Step 36. There are two types of CSWs. The default will be your configured CSW.

Step 37. Click the **Open Selector** button.

Step 38. If your agency prefers to use the other option, then you would select it here.

Step 39. In this example, you will use CAPPS CSW.

Step 40. Click the **Select** link.

Step 41. Click the scrollbar.

Step 42. The **Profile** fields are auto-populated from the Job Template interface.

Step 43. The Target Start Date is informational at this point and can be changed. There may be someone retiring and this position may start a few days before the retiree leaves, as an example.

Step 44. Click the **Calendar** button.

Step 45. Click the **Next** button.

Step 46. Click the **Next** button.

Step 47. Click the **1** button.

Step 48. The links on the left also displays the Requisition Structure. You can click on the links to advance to different sections of the Requisition instead of using the scrollbar.

Step 49. Click the **Compensation** link.

Step 50. Click the **Budget** link.

Step 51. The Budget section contains free form fields so that funding source information can be entered. These fields can be left blank.

Step 52. You can use multiple funding sources however they must be separated by a comma.

Step 53. You can also select whether this position will be Position Funded or Department Funded.

Step 54. This field can be left as Not Specified as well.

Step 55. Click the **CAPPS Requisition External Description** link.

Step 56. Click in the **Description - External** field.

Step 57. Enter the desired information into the field. Enter "**Enter the description for External**".

Step 58. Click the scrollbar.

Step 59. Click in the field.

Step 60. Enter the desired information into the field. Enter "**Enter the qualifications for External**".

Step 61. Click the scrollbar.

Step 62. The **Contact Information** section ***must*** be completed in order to request Approval and Post the requisition to Career Section.

Step 63. This information is exported by the Work In Texas (WIT) Requisition interface and loaded in WIT for candidates to contact for any questions.

Step 64. Click in the **Contact First Name** field.

Step 65. Enter the desired information into the **Contact First Name** field. Enter "**Jada**".

Step 66. Press **[Tab]**.

Step 67. Enter the desired information into the **Contact Last Name** field. Enter "**Train000**".

Step 68. Click in the **Contact Position Title** field.

Step 69. Enter the desired information into the **Contact Position Title** field. Enter "**Queen**".

Step 70. Click in the **Contact Email** field.

Step 71. Enter the desired information into the **Contact Email** field. Enter "**queen@email.com**".

Step 72. Click in the **Contact Address** field.

Step 73. Enter the desired information into the **Contact Address** field. Enter "**1100 Contact Lane**".

Step 74. Click in the **Contact Address City** field.

Step 75. Enter the desired information into the **Contact Address City** field. Enter "**Austin**".

Step 76. Click in the **Contact Address State** field.

Step 77. Enter the desired information into the **Contact Address State** field. Enter "**TX**".

Step 78. Click in the **Contact Address Postal** field.

Step 79. Enter the desired information into the **Contact Address Postal** field. Enter "**78711**".

Step 80. Click the scrollbar.

Step 81. When the Description for the Internal requisition is the same or very similar as the External, you can use the **Copy From** feature and tweak your changes.

Step 82. Click the **Copy From** link.

Step 83. You can select which fields will be copied. The default is to copy both the Description and Qualifications from the external description fields.

Step 84. Click the **Done** button.

Step 85. The text was copied here. Change the word External.

Step 86. Enter the desired information into the field. Enter "**Internal**".

Step 87. Click the scrollbar.

Step 88. The Qualification were copied here. Change the word External.

Step 89. Enter the desired information into the field. Enter "**Internal**".

Step 90. Click the scrollbar.

Step 91. The Questionnaire contains prepopulated disqualification questions.

Step 92. Click the scrollbar.

Step 93. There is an additional Questions section where you can create questions to establish ACE candidates.

Step 94. Click the scrollbar.

Step 95. Click the scrollbar.

Step 96. Click the **Page2** link.

Step 97. Once you have completed the requisition entries, you can double check to ensure that all required entries for the requisition have been made.

Step 98. Click the **Inspect** button.

Step 99. The **Inspect Tool** will tell you what information is missing that is required in order to Save, Approval, and Post the requisition.

Step 100. If you missed information, the Inspect Tool will tell you and you can click on the section and fill in the missing information.

Step 101. Click the **Close** button.

Step 102. Click the scrollbar.

Step 103. Click the **Save** button.

Step 104. Click the **Done** button.

Step 105. The **Requisition Name** and **ID** are displayed and a **Summary** is to the left.

Step 106. Click the **More Actions** button.

Step 107. Click the **Submit for Approval** link.

Step 108. Multiple approvers can be added to a requisition. In this example, you will add two approvers.

Step 109. Click the **Add Approvers** button.

Step 110. Click in the **Name** field.

Step 111. Enter the desired information into the **Name** field. Enter "**nicole**".

Step 112. Click the **Apply Filters** button.

Step 113. Click the **Nicole Approver** option.

Step 114. Click the scrollbar.

Step 115. Click the **Add / Update Approvers** button.

Step 116. Next, you will add the 2nd approver.

Step 117. Click the **Add Approvers** link.

Step 118. Click the **Doug Approver** option.

Step 119. Click the scrollbar.

Step 120. Click the **Add / Update Approvers** button.

Step 121. You can determine the order of the approvers for the requisition. In this example, Nicole must approve 1st and Doug approves 2nd.

Step 122. Click the **Add the approvers to the list of collaborators** option.

Step 123. Click the scrollbar.

Step 124. Click in the **Comment to Approvers** field.

Step 125. Enter the desired information into the **Characters remaining** field. Enter "**Make sure that what is entered is factual.**".

Step 126. After the approval process, assign to field must be correct. Although this field is defaulted, you may want this assigned to a different person.

Step 127. Click the **Submit for Approval** button.

Step 128. Click the scrollbar.

Step 129. The requisition is in **Pending - To Be Approved status**.

Step 130. Click the **Back to Requisition List** button.

Step 131. Congratulations! You have completed this lesson.

Duplicating a Requisition

Section 2, Lesson 1 Exercise - Scenario 3: Duplicating a Requisition

In CAPPS Recruiting, users have the ability to duplicate requisitions in order to create requisitions similar to an existing one.

Any requisition can be duplicated regardless of its status.

When duplicating a requisition, it is critical to review all of the information duplicated to ensure that it applies to the new requisition. Some fields may need to be edited and others will require manual entries. It will carry over the list of approvers from the original requisition as the starting point for approvers on the requisition. If the approvers are not correct for the new requisition, they can be deleted and new approvers can be assigned.

Procedure

In this lesson, you will learn how to duplicate a requisition.

In this scenario, you will duplicate the requisition named Data Entry/Operator - Req ID 00011504.

Step 1. Click the **Requisitions** link.

Step 2. Click the **Data Entry Operator II** link.

Step 3. There are two different ways for Recruiters/Rec Admins to duplicate a requisition.

Step 4. One option is by using the **Two-Paper Clip Icon** and the other is by using the **More Actions** drop down.

Step 5. Click the **More Actions** button.

Step 6. Click the **Duplicate this requisition** link.

Step 7. You can edit this requisition if it needs to be changed from the original.

Step 8. You may want to check the hiring manager, approvers, funding etc.

Step 9. Click the **Save** link.

Step 10. Click the **Done** button.

Step 11. Click the **Back to Requisition List** button.

Step 12. Click the **Recruiting** link.

Step 13. Congratulations! You have completed this lesson.

Canceling a Requisition

Section 2, Lesson 1 Exercise - Scenario 4: Canceling a Requisition

The Cancel Requisition action is available when the requisition has one of the following statuses: Approved, Scheduled, Posted, Unposted, Expired, or Draft. This action is not available when at least one candidate has been hired for the requisition or an offer was extended.

An event is added to the Requisition History tab with the comment entered and the name of the user who performed the action. The status of the requisition changes to Cancel. The requisition is automatically unposted from the corporate posting and the agency posting.

Procedure

In this lesson, you will learn how to cancel a requisition.

In this scenario, you will be canceling the requisition named Data Entry II - Req ID 00011522.

Step 1. This is another way to get to requisitions.

Step 2. Click the **2** link.

Step 3. Click the **Data Entry Operator II** link.

Step 4. Click the **More Actions** button.

Step 5. Click the **Cancel** link.

Step 6. Enter the desired information into the **Characters remaining** field. Enter "**Please cancel.**".

Step 7. Click the **Done** button.

Step 8. The status of the requisition is Canceled.

Step 9. Click the **Back to Requisition List** button.

Step 10. To view the inactive requisitions in the requisitions list, you must select to include them.

Step 11. Click the **Include inactive requisitions** option.

Step 12. Click the **Apply Filters** button.

Step 13. The cancelled req is listed.

Step 14. Click the **Back to Center Stage** button.

Step 15. Congratulations! You have completed this lesson.

Printing a Requisition

Section 2, Lesson 1 Exercise - Scenario 5: Printing a Requisition

The print functionality allows CAPPS Recruiting users to create a PDF version of a requisition file or candidate file for printing.

The print function is available in the requisitions list and the requisition files. When using the print function, users can decide to print a summary listing of requisitions, or they can choose to print the details of the file where content is presented into sections.

Users can print up to a maximum of 15 requisition files at a time. Within the .pdf file that is created, there is an option to Save and/or Print the file.

Procedure

In this lesson, you will learn how to print a requisition.

In this scenario, you will print the requisition named Manager II - Req ID 00011520.

Step 1. Click the **Requisitions** link.

Step 2. Open the Manager II requisition by clicking on the title. Since there are two with the same name, you can identify them by their unique Req IDs.

Step 3. Click the **Manager II - 00011520** link.

Step 4. Click the **Print this requisition** button.

Step 5. You may print all sections of the requisition or remove any sections that you don't want printed.

Step 6. Since the **Questionnaire** section is really long, you can remove it from being printed, when necessary. You would unselect this section.

Step 7. Click the **Questionnaire** option.

Step 8. Click the **Print PDF** button.

Step 9. Click the **Close Tab (Ctrl+W)** button.

Step 10. Click the **Back to Requisition List** button.

Step 11. Congratulations! You have completed this lesson.

Add Questions

Adding New Questions, ACE and Alert

Section 2, Lesson 2 Exercise - Scenario 1: Adding New Questions, Ace, and Alerts

When adding questions to a requisition, users need to specify if the question is **Required** for the position or if it is an **Asset**.

Required and Asset Criteria

A **Required Criterion** means that the answer to a question has to be selected for the candidate to be considered for the job. Think "Minimum Requirements". All hires have to meet all required qualifications.

An **Asset Criterion** means that the answer to a question does not have to be selected for the candidate to be considered for the job, but would distinguish this candidate compared to others. Think "Strongly Preferred" and "Nice-to-Have" qualifications. The goal is to identify enough Assets to separate "minimally qualified" candidates from "ideal" candidates (**ACE** Candidates).

ACE Candidate

The ACE candidate alert allows Recruiting Center users to set a threshold to identify the ideal candidates and to send an email to specific recipients to inform them that ACE candidates were found. The alert allows the system to identify the candidates who achieve or exceed the ACE alert threshold for a job offer. It identifies top candidates based on their responses to the questions in the Prescreening section of the requisition file. The ACE candidate alert is based on Required and Asset criteria.

A best practice is to always have the ACE candidate alert activated. When setting the ACE candidate alert, answer the prescreening questions as your ideal candidate would, then calculate the total assets to determine the ACE threshold.

All ACE Candidate Alert recipients receive the same candidate file, regardless of permissions to view candidate information in the system. When an ACE Candidate Alert is set, the recipient receives an email with an attached PDF file that contains data from the candidate file. Sections of the candidate file that contain no data do not appear.

A best practice is to identify Required criteria first and then identify and select any Asset criteria.

Procedure

In this lesson, you will learn how to add a question to a requisition, assign it as an asset and alert.

Step 1. Click the **3** link.

Step 2. You will add a question to the Manager II Requisition (00011523).

Step 3. Click the **Manager II** link.

Step 4. Click the **Requisition Structure** button.

Step 5. Click the **Questionnaire** link.

Step 6. Click the scrollbar.

Step 7. There is an additional question that you need to add to ensure the candidate is a great fit for the agency.

Step 8. Click the **Create** link.

Step 9. You will enter the question in the Question textbox.

Step 10. Enter the desired information into the **Question** field. Enter "**What is your highest education level?**".

Step 11. You will determine the type of answer.

Step 12. Click the **Single Answer** option.

Step 13. You can decide if you want the Selection Method to be Radio Buttons or a Drop Down list.

Step 14. Click the **Radio Buttons** option.

Step 15. You will enter the possible answers in the fields provided.

Step 16. Click in the **1** field.

Step 17. Enter the desired information into the **1** field. Enter "**Bachelor's**".

Step 18. Click in the **2** field.

Step 19. Enter the desired information into the **2** field. Enter "**Master's**".

Step 20. Click in the **3** field.

Step 21. Enter the desired information into the **3** field. Enter "**Master's +**".

Step 22. Click the scrollbar.

Step 23. Click the **Save and close** button.

Step 24. Click the **Yes** button.

Step 25. Notice that the question that you just added is #15, the last on the list. You may want it to show within the first few questions.

Step 26. You are going to change the order of this question in the list.

Step 27. Click the **Decrement** option.

Step 28. Click in the **Decrement** field.

Step 29. Press **[Backspace]**.

Step 30. Press **[Backspace]**.

Step 31. Enter the desired information into the **Decrement** field. Enter "**3**".

Step 32. Click the scrollbar.

Step 33. Click the **Reorder** link.

Step 34. Now the question appears 3rd on the list.

Step 35. You must determine which answer is required.

Step 36. Click the **Bachelor's** option.

Step 37. In this scenario, a Bachelor's degree is required but a Masters and Masters + are nice to haves (Assets).

Step 38. Click the **Master's** option.

Step 39. Click the **Master's +** option.

Step 40. Click the scrollbar.

Step 41. Click the **Save** link.

Step 42. Click the **Done** button.

Step 43. Click the **PreScreen Alerts** tab.

Step 44. Click the **Modify** link.

Step 45. This screen is asking for you to identify the candidates that meet all the required criteria and a specific number of Asset questions that would make an ideal **ACE candidate**.

Step 46. Click an entry in the list.

Step 47. You only assigned one question as an asset. This is why there is only 1 available Asset selection.

Step 48. Click the **1** list item.

Step 49. If you would like the **ACE Candidate Alert** sent via email then you would find and select the recipient's name.

Step 50. Click the **Add Recipients** link.

Step 51. Click the **Chrome Legacy Window** object.

Step 52. Click the **Add Recipients** button.

Step 53. The **ACE Candidate Alert** is set along with the recipients that will receive the Alert.

Step 54. Click the **Done** button.

Step 55. Click the **Back to Requisition List** button.

Step 56. Click the **Back to Center Stage** button.

Step 57. Congratulations! You have completed this lesson.

Approve/Reject Requisition

Approving a Requisition - eShare

Section 2, Lesson 3 Exercise - Scenario 1: Approving a Requisition via eShare

Selected approvers will approve/reject requisitions using one of these methods:

• If the approver is a CAPPS Recruiting user, the approver will receive an *Approve Requisition* task in the Tasks channel and Tasks list.

• If the approver is not a CAPPS Recruiting user, the approver will receive an eShare message via e-mail.

• If the approver is both a CAPPS Recruiting user and an eShare user, the approver will receive an Approve Requisition task in the Tasks channel and Tasks list as well as a message via e-mail.

Procedure

In this lesson, you will learn how to Approve a Requisition via eShare Center.

The following scenario will be used:

You will approve Requisition ID - 00011520 - Manager II.

- Include comment: Please post asap
- Request an email of your approval decision.

Step 1.	Click the **Respond** link.
Step 2.	Click the **I Agree** button.
Step 3.	Enter the desired information into the **User Name** field. Enter "**Train99**".
Step 4.	Click in the **Password** field.
Step 5.	Enter the desired information into the **Password** field. Enter "**Train**".
Step 6.	Click the **Sign In** button.
Step 7.	The default is "I approve this requisition."
Step 8.	It is important to review the **Requisition Details** prior to **Approving** or **Rejecting** a requisition.
Step 9.	Click the **Requisition Details** link.
Step 10.	There are several pages to this requisition.
Step 11.	Click the **Close Tab (Ctrl+W)** button.
Step 12.	Click the **Requisition approval path details** link.
Step 13.	Click the **Close** button.
Step 14.	Comments are not required when approving this requisition however in this example, you will add a comment.
Step 15.	Click in the **Comments** field.
Step 16.	Enter the desired information into the **Comments** field. Enter "**Please post asap.**".
Step 17.	Click the **Send me an email with my decision** option.

Step 18. Click the **Done** button.

Step 19. Click the **Exit** button.

Step 20. Since you checked the box to receive an email acknowledgement of your approval, you will receive an email similar to this one.

Step 21. Congratulations! You have completed this lesson.

Approving a Requisition - Tasklist

Section 2, Lesson 3 Exercise - Scenario 2: Approving a Requisition via Tasklist

Procedure

In this lesson, you will learn how to Approve a Requisition via Task List.

The following scenario will be used:

You will approve Requisition ID - 0001150 - Data Entry Operator II.

- Include comment: Please post asap
- Request an email of your approval decision.

Step 1. Click the **Approve Requisition Total** link.

Step 2. Click the **Approve Requisition** link.

Step 3. Click the **Approve** option.

Step 4. Click in the **Decision comment** field.

Step 5. Enter the desired information into the field. Enter "**Please post asap.**".

Step 6. Click the **Send me an email with my decision** option.

Step 7. Click the **Done** button.

Step 8. Click the **Back to Task List** button.

Step 9. Click the **Back to Center Stage** button.

Step 10. Congratulations! You have completed this lesson.

Rejecting a Requisition

Section 2, Lesson 3 Exercise - Scenario 3: Rejecting a Requisition

Whenever a requisition is being Rejected, comments must be provided.

Procedure

In this lesson, you will learn how to Reject a Requisition via eShare.

1) You will reject Requisition #00011504.

- Enter Comment: Please correct the qualifications.
- Request an email of your rejected decision.

Step 1.	Click the **Respond** link.
Step 2.	Click the **I Agree** button.
Step 3.	Enter the desired information into the **User Name** field. Enter "**Train99**".
Step 4.	Click in the **Password** field.
Step 5.	Enter the desired information into the **Password** field. Enter "**Train**".
Step 6.	Click the **Sign In** button.
Step 7.	Click the **Requisition Details** link.
Step 8.	Click the **Close tab** button.
Step 9.	Click the **I approve this requisition** list.
Step 10.	Click the **I reject this requisition** list item.
Step 11.	When rejecting a requisition, comments are required.
Step 12.	Click in the **Comments** field.
Step 13.	Enter the desired information into the **Taleo e-share Center** field. Enter "**Please correct the qualifications.**".
Step 14.	Click the **Send me an email with my decision** option.
Step 15.	Click the **Done** button.
Step 16.	Click the **Exit** button.

Step 17. Since you checked the box to receive an email acknowledgement of your rejection, you will receive an email similar to this one.

Step 18. Congratulations! You have completed this lesson.

Posting a Requisition

Section 2, Lesson 4 Exercise - Scenario 1: Posting a Requisition

Requisition posting consists of publishing a requisition in order to have candidates apply for a job.

The requisition must have one of the following statuses: Open - Approved, Open - Unposted, Open - Expired

There are several ways to access the Posting and Sourcing feature:

• From the More Actions menu within the requisition file.

• From the Posting and Sourcing tab within the requisition file.

• From the Tasks Channel, the Ready for Sourcing link will take you directly to a list of requisitions that need to be posted.

• When a requisition is ready for posting or already posted, you can click the Status Detail link in the requisitions list and you will be taken to the Posting and Sourcing tab of the requisition.

Procedure

In this lesson, you will learn how to Post a Requisition (Job).

The following scenario will be used:

1) You will post and source Requisition ID - 00011523 - Manager II.

Step 1. The Tasks panel indicates that one requisition is Ready to be Sourced.

Step 2. Click the **1** link.

Step 3. Click the **Configure Requisition Sourcing** link.

Step 4. Click the **Sourcing** tab.

Step 5. Click the **Add Career Sections** button.

Step 6. Agencies will only see **three (3)** Career Sections: External, Agency Internal and Secondary Submission.

Step 7. If you don't want all three Career Sections selected, you would simply uncheck the section that you don't want posted.

Step 8. Click the **CAPPS External** option.

Step 9. In this case, you want all Career Sections selected.

Step 10. Click the **CAPPS External** option.

Step 11. Click the **Add/Update Career Sections** button.

Step 12. Click the scrollbar.

Step 13. In this example, you are posting effective Today. You can change the Post from date by using the calendar icon.

Step 14. The requisition will be available for 14 days from the Post from date. 14 days is the default and it can be changed.

Step 15. Click the **Save and Apply** button.

Step 16. Click the scrollbar.

Step 17. Click the **Back to Task List** button.

Step 18. There are no additional tasks to complete.

Step 19. Click the **Recruiting** link.

Step 20. Congratulations! You have completed this lesson.

UnPosting a Requisition

Section 2, Lesson 4 Exercise - Scenario 2: UnPosting a Requisition

A posted job can be unposted when necessary. Unposting removes the job from the CAPPS and agency sites so that applicants can no longer apply for the job.

Procedure

In this scenario, you will learn how to Unpost a requisition.

The following scenario will be used:

1) Unpost Requisition ID - 00011523 - Manager II.

Step 1.	Select the Open Job Requisition. There is only one posted.
Step 2.	Click the **1** link.
Step 3.	Click the **Manager II** link.
Step 4.	Click the **Sourcing** tab.
Step 5.	Click the **Modify** link.
Step 6.	Click the scrollbar.
Step 7.	To unpost all of the Career Sections, you will uncheck the Career Section checkbox.
Step 8.	Click the **Career Sections** option.
Step 9.	Click the scrollbar.
Step 10.	Click the **Save and Apply** button.
Step 11.	Note the Status: Unposted with the Unposted Date.
Step 12.	Click the scrollbar.
Step 13.	Click the **Back to Requisition List** button.
Step 14.	Click the **Back to Center Stage** button.
Step 15.	Congratulations! You have completed this lesson.

Extending a Posting

Section 2, Lesson 4 Exercise - Scenario 3: Extending a Posting

If the Posting date should expire on a requisition, there is a task that will appear requesting the user to Extend Posting.

Users will be notified three days prior to the expiration (end date) of a posting.

In order to extend a posting, the posting dates must be changed.

Procedure

In this lesson, you will learn how to extend the posting for a requisition.

The following scenario will be used:

1) Extend the Posting for Requisition ID - 00011523 - Manager II

Step 1. Under Job Requisitions, select the Open Total.

Step 2. Click the **2** link.

Step 3. The Req 00011523 - Manager II has expired so you will extend the posting timeframe.

Step 4. Click the **Manager II** link.

Step 5. Click the **Sourcing** tab.

Step 6. Click the **Modify** link.

Step 7. Click the scrollbar.

Step 8. Click the **All Career Section** option.

Step 9. Since all of the postings are expired, the system will extend the posting from today till 14 days later.

Step 10. Click the scrollbar.

Step 11. Click the **Save and Apply** button.

Step 12. Click the scrollbar.

Step 13. Click the **Recruiting** link.

Step 14. Congratulations! You have completed this lesson.

Manage Candidates

Candidate Creation

Section 2, Lesson 5 Exercise - Scenario 1: Candidate Creation

CAPPS Recruiting users have the ability to create candidate general profiles and job-specific submissions. The job-specific profile is the most commonly used.

When selecting the Create Candidate action, a template of required fields is provided to successfully create a candidate profile.

Note: The Candidate Creation process typically occurs when an applicant does not apply online. The candidate will receive an email with logon instructions to complete their profile as needed.

Procedure

In this lesson, you will learn how to create a Candidate profile.

Step 1. Click the **Submissions** link.

Step 2. Click the **More Actions** menu.

Step 3. Click the **Create New Candidate** link.

Step 4. The **Create New Candidate** page displays the creation options.

Step 5. **Create a new candidate:** For candidates who have not completed a job-specific submission.

Step 6. **Create a new candidate and submission:** For candidates who have submitted a profile for a specific requisition.

Step 7. In this lesson, you will use the default (Create a new candidate and submission).

Step 8. Click the **Next** button.

Step 9. You will select the corresponding requisition for the new candidate.

Step 10. In this lesson, you are using the requisition in Sourcing status.

Step 11. Click the **Manager II - 00011523** link.

Step 12. You must select the **Next** button at the **bottom of the screen**.

Step 13. Click the scrollbar.

Step 14. Click the **Next** button.

Step 15. You can upload the candidate's resume.

Step 16. In this lesson, you will not upload.

Step 17. Click the **Skip** button.

Step 18. Click in the **First Name** field.

Step 19. Enter the desired information into the field. Enter "**Linda**".

Step 20. Enter the Last Name.

Step 21. Press **[Tab]**.

Step 22. Enter the desired information into the field. Enter "**Train99**".

Step 23. Click in the **Email Address** field.

Step 24. Enter the desired information into the field. Enter "**lindatrain99@email.com**".

Step 25. Click in the **Street Address** field.

Step 26. Enter the desired information into the field. Enter "**1100 Train Street**".

Step 27. Click in the **City** field.

Step 28. Enter the desired information into the field. Enter "**Austin**".

Step 29. Enter the phone number.

Step 30. Press **[Tab]**.

Step 31. Enter the desired information into the field. Enter "**000-111-2222**".

Step 32. Click the scrollbar.

Step 33. Click the **Next** button.

Step 34. The system checks to ensure there are no duplicates for this candidate.

Step 35. The new candidate will be created.

Step 36. Click the **Next** button.

Step 37. You can edit the Personal Information fields.

Step 38. Next, you will enter the Candidate's Zip Code.

Step 39. Click the scrollbar.

Step 40. Click in the **Zip/Postal Code** field.

Step 41. Enter the desired information into the field. Enter "**78711**".

Step 42. Click the **Primary Number** menu.

Step 43. Click the **Home Phone** list item.

Step 44. Click the scrollbar.

Step 45. Click the **Done** button.

Step 46. Next, you will review the remaining information for the Job Submission.

Step 47. Click the **Collapse** button.

Step 48. Click the **Resume Edit** button.

Step 49. You are able to copy and paste information from the Resume.

Step 50. Click the **Resume Collapse** button.

Step 51. Click the **Submission Information Collapse** button.

Step 52. Click the **Profile Edit** button.

Step 53. **Retain Job Submission** should only be used according to your agency's policy.

Step 54. The **Work in Texas (WIT) Indicator** is automatically updated once loaded from WIT.

Step 55. Click the scrollbar.

Step 56. Click the **Full-time** option.

Step 57. Enter the Candidate's Date of Availability

Step 58. Click the **Calendar** button.

Step 59. Click the **December 22** button.

Step 60. Click the scrollbar.

Step 61. The Screening fields should remain 'Not Specified'. They will be updated according to the online application information submitted.

Step 62. Click the scrollbar.

Step 63. Click the **Employment Preferences Modify** link.

Step 64. Click in the **City** field.

Step 65. Enter the desired information into the field. Enter "**austin**".

Step 66. Click the scrollbar.

Step 67. Click the **Apply Filters** button.

Step 68. Click the **Texas, Austin** option.

Step 69. Click the **Done** button.

Step 70. Click the **Job Field Modify** link.

Step 71. Click the **Business and Financial Operations** option.

Step 72. Click the **Done** button.

Step 73. Click the scrollbar.

Step 74. The Experience/Credentials and the Job Questionnaire sections can be reviewed and edited.

Step 75. Click the scrollbar.

Step 76. Click the **Save** link.

Step 77. Click the **Done** button.

Step 78. Click the **Back to Submission List** button.

Step 79. Congratulations! You have completed this lesson.

Screen for Candidates

Prescreening Candidates

Section 2, Lesson 6 Exercise - Scenario 1: Prescreening Candidates

Candidates apply on posted requisitions and answer the prescreening questions. CAPPS Recruiting users have the ability to use questions as prescreening tools to find the ideal candidates.

Procedure

In this lesson, you will learn how to prescreen a candidate.

Step 1. Click the **Job Requisitions Total** link.

Step 2. You will view the applicants for the Manager II - 00011520 requisition.

Step 3. Click the **Applicant** link.

Step 4. There are 2 candidates for this requisition. You will pre-screen Martha Train01. Her current status is HM Screen - To be Reviewed.

Step 5. Click the **Train01, Martha** link.

Step 6. In this lesson, you have already reviewed the job submission information and all looks good so you will move Martha to the next step.

Step 7. Click the **More Actions** list.

Step 8. Click the **Change Step/Status** list item.

Step 9. Click the **Status** list.

Step 10. Click the **1st HM Review** list item.

Step 11. This candidate doesn't require a 2nd or 3rd HM Review. You will change their status to Passed HM Screen.

Step 12. Click the **Status** list.

Step 13. Click the **Passed HM Screen** list item.

Step 14. Click the **Apply and Continue** button.

Step 15. You have already conducted the Pre-Interview Assessments so you will change the Status to Passed Assessments.

Step 16. If you haven't then you would Apply and Close then update the status when it is appropriate.

Step 17. Click the **Apply and Continue** button.

Step 18. Click the **In Progress** list.

Step 19. Click the **Passed Assessments** list item.

Step 20. Click the **Apply and Continue** button.

Step 21. This candidate is ready for their 1st interview.

Step 22. In the next topic, you will prepare the interview communication.

Step 23. Click the **Apply and Close** button.

Step 24. Congratulations! You have completed this lesson.

Interview Candidates

Interviewing Candidates

Section 2, Lesson 7 Exercise, Scenario 1: Interviewing Candidates

CAPPS Recruiting users can schedule, update and cancel interviews directly in the Recruiting Center.

Each time an interview is scheduled, updated or cancelled in CAPPS Recruiting, an email message is sent to selected attendees.

There are a few basic steps that must be completed when a recruiter wants to interview a candidate for a job:

- The Recruiter selects the candidate file from the Candidates list or the requisition-specific candidate list,
- The candidate must be at the right Candidate Selection Workflow (CSW) interview step/status.
- The interview must be scheduled. The recruiter invites the candidate and can also invite other attendees to the interview meeting.

When all the interview details are entered, the recruiter sends the interview meeting invitation.

The candidate, the interview organizer and the selected attendees receive the interview meeting invitation by email. The interview organizer may print the invitation and send it to the candidate by fax or regular mail.

NOTE: Scheduling an interview may be setup outside of CAPPS Recruiting (i.e. Microsoft Outlook). Update the appropriate CSW Step/Status actions and add comments related to the interview activity within CAPPS Recruiting. This will assist in maintaining accurate candidate history.

Procedure

In this lesson, you will learn the steps to schedule and update a candidate's interview.

Step 1. Click the **Job Requisitions Open Total** link.

Step 2. You are on the Requisitions page.

Step 3. Click the **Manager II - 00011520 Applicant link** link.

Step 4. You are on the Submissions page for the Manager II - 00011520 requisition.

Step 5. Click the **Train01, Martha** link.

Step 6. Click the **More Actions** list.

Step 7. Click the **Send Correspondence** list item.

Step 8. It is preferred that you use the Send Message by Email option.

Step 9. Click the **From Template** button.

Step 10. Click the **Next** button.

Step 11. There is a list of templates that you will scroll through to find the **Interview Confirmation template**.

Step 12. Click the scrollbar.

Step 13. Click the **CAPPS Interview Confirmation** link.

Step 14. You will select the appropriate Agency logo/letter head.

Step 15. The CAPPS Generic Logo is selected as the default.

Step 16. Click the **Select Template** button.

Step 17. The system will tell you if there are revisions needed in order to send this correspondence.

Step 18. There are 10 unresolved tokens. You must fill out the fields to the left.

Step 19. Click in the **RequisitionHeader.RecruiterAsst Email** field.

Step 20. Enter the desired information into the field. Enter "**nicole.train01@email.com**".

Step 21. Click in the **RequisitionHeader.HmgrAsstEmail** field.

Step 22. Enter the desired information into the field. Enter "**nicole.manager@email.com**".

Step 23. Click in the **Company Name** field.

Step 24. Enter the desired information into the field. Enter "**Training Company**".

Step 25. Click in the **Interview_Date_Time** field.

Step 26. Enter the desired information into the field. Enter "**December 23, 2020 at 1:00pm**".

Step 27. Click in the **Interview_Duration** field.

Step 28. Enter the desired information into the **Interview_Duration** field. Enter "**1 hour**".

Step 29. Click in the **Interview_Location** field.

Step 30. Enter the desired information into the **Interview_Location** field. Enter "**Virtual Zoom**".

Step 31. Click the scrollbar.

Step 32. Click in the **Interviewers_Names_Titles** field.

Step 33. Enter the desired information into the **Interviewers_Names_Titles** field. Enter "**Dougie Train02**".

Step 34. Click in the **Special Instructions** field.

Step 35. Enter the desired information into the **Special_Instructions** field. Enter "**Test your Zoom link in advance**".

Step 36. Click the scrollbar.

Step 37. Click in the **Requisition_HmgrPhone** field.

Step 38. Enter the desired information into the **Requisition_Hmgr_Phone** field. Enter "**5120001010**".

Step 39. Click the **Apply** button.

Step 40. Click the scrollbar.

Step 41. The Agency_General_Logo field was missed.

Step 42. Click in the **Agency_Generic_Logo** field.

Step 43. Enter the desired information into the **Agency_Generic_Logo** field. Enter "**Training Logo**".

Step 44. Click the **Apply** button.

Step 45. No unresolved tokens (errors) were found.

Step 46. Click the scrollbar.

Step 47. Review all of the information to ensure that it is correct.

Step 48. Click the scrollbar.

Step 49. Click the scrollbar.

Step 50. Click the **Send** button.

Step 51. Click the **Close** button.

Step 52. Click the **Change Step/Status** list item.

Step 53. Click the **Status** list.

Step 54. Click the **Passed Interviews*** list item.

Step 55. Click the **Apply and Continue** button.

Step 56. Click the **Step** option.

Step 57. Click the **Pre-Offer Checks** list item.

Step 58. Click the **Status** option.

Step 59. Click the **Passed Checks** list item.

Step 60. Click the **Apply and Close** button.

Step 61. Congratulations! You have completed this lesson.

Make an Offer

Creating and Extending an Offer

Section 2, Lesson 8 Exercise - Scenario 1: Creating and Extending an Offer

Procedure

In this lesson, you will learn the steps to create an offer, extend that offer to a candidate, and record the candidate's response.

Step 1. Click the **Candidates Active Submissions Total** link.

Step 2. Select the candidate, Martha Train01 that is in **Pre-Offer Checks** status.

Step 3. Click the **Train01, Martha** link.

Step 4. To create an offer for a candidate, the candidate must be in the appropriate CSW **Step** and **Status**.

Step 5. Notice the **Status** for this candidate is '**Passed Checks**' which means that CAPPS Recruiting will enable an offer to be created.

Step 6. Click the **More Actions** option.

Step 7. The **Change To** step and status is Offer - Offer to Be Made.

Step 8. Click the **Apply and Close** button.

Step 9. Click the **More Actions** option.

Step 10. Click the **Create Offer** list item.

Step 11. The **Offers** tab becomes available to enter the detail of the terms and conditions of a job. Specific information defaults from the Requisition to the **Offer (New)** form.

Step 12. The **Offer** form is where all the information is gathered to create an offer. It is available to update as needed.

Step 13. Click the scrollbar.

Step 14. Click the **Calendar** button.

Step 15. Click the **29** link.

Step 16. You would also select the start time.

Step 17. In this lesson, you will leave the defaulted time.

Step 18. Click the **Done** link.

Step 19. Click the **Requisition Copy All Values** button.

Step 20. Click the scrollbar.

Step 21. Notice how the designated information from the Requisition has been copied to the Requisition column.

Step 22. This is a result of using the Requisition **copy** icon at the top of the column.

Step 23. Ensure that the Position number is correct.

Step 24. Continue scrolling down the page to check entries and change if needed.

Step 25. You will not create the Offer Letter just yet.

Step 26. It will be created after the offer is approved but not using this link.

Step 27. Click the scrollbar.

Step 28. Click the **Save and close** button.

Step 29. Click the **More Actions** list.

Step 30. Click the **Submit Offer for Approval** list item.

Step 31. The manager is listed as an Approver. In this example, you will add one more approver.

Step 32. Click the **Add Approvers** link.

Step 33. Click in the **Name** field.

Step 34. Enter the desired information into the **Name** field. Enter "**nicole**".

Step 35. Click the scrollbar.

Step 36. Click the **Apply Filters** button.

Step 37. Click the **Interviewer** option.

Step 38. Click the **Add/Update Approvers** button.

Step 39. Click the scrollbar.

Step 40. Click in the **Comment to Approvers** field.

Step 41. Enter the desired information into the **Comment to Approvers** field. Enter "**Please approve ASAP.**".

Step 42. Click the **Submit for Approval** button.

Step 43. Click the scrollbar.

Step 44. Once the approvers sign off, then the next step will be to extend the offer to the candidate.

Step 45. Click the **Extend Offer Total** link.

Step 46. Click the **Extend Offer for Martha Train01** link.

Step 47. Click the **More Actions** list.

Step 48. Click the **Extend Offer** list item.

Step 49. Click the **Email** option.

Step 50. Click the **Next** button.

Step 51. Click the **CAPPS Conditional Offer EMAIL** link.

Step 52. Be sure to select the appropriate Logo.

Step 53. Click the **Select Template** button.

Step 54. You have 4 unresolved tokens that need to be resolved.

Step 55. This lesson does not show filling in the fields for these tokens.

Step 56. Click the **Finish** button.

Step 57. Click the **Send Offer** list item.

Step 58. Click the **Next** button.

Step 59. Click the scrollbar.

Step 60. Click the **Send Offer** button.

Step 61. Next, you will see how to capture the acceptance of the offer.

Step 62. Click the **More Actions** list.

Step 63. Click the **Capture Offer Response** list item.

Step 64. Click the **The candidate accepted the offer** option.

Step 65. You have decided to have Martha start a day early.

Step 66. Click the **Calendar** button.

Step 67. Click the **6** link.

Step 68. You will enter a time. In this lesson, we left the defaulted time.

Step 69. Click the **Done** link.

Step 70. You can uncheck the checkbox here if you know the start date for sure OR you can wait until or before you move the candidate to 'Hire/To Be Hired' status.

Step 71. Click in the **Comments** field.

Step 72. Enter the desired information into the field. Enter "**Candidate will start earlier than anticipated.**".

Step 73. Click the **Done** button.

Step 74. Click the **Ok** button.

Step 75. Click the **More Actions** list.

Step 76. Click the **Change Step/Status** list item.

Step 77. Notice the Step and Status is now **Offer - Accepted**.

Step 78. Click the **Apply and Close** button.

Step 79. Congratulations! You have completed this lesson.

Stage a Hire Candidate

Hire Candidate

Section 2, Lesson 9, Exercise 1 - Scenario 1: Hire a Candidate

The recruiter progresses a candidate through the Candidate Selection Workflow (CSW) to the status of "To Be Hired". This status triggers the New Hire Interface to upload the candidate file into the CAPPS HR/Payroll system.

This lesson walks through the steps to change a candidate in CAPPS Recruiting to the status of "To Be Hired".

Procedure

In this lesson, you will learn how to stage a candidate for hire using the Candidate Selection Workflow (CSW).

Step 1. You may see Finalize Start Date in the Offers section because we need to deselect tentative as the Start Date.

Step 2. Click the **Finalize Start Date Total** link.

Step 3. Click the **Finalize Start Date for Martha Train01** link.

Step 4. There is a message that tells you what you need to do, if you are unsure.

Step 5. Click the **More Actions** list.

Step 6. Click the **Update Start Date** list item.

Step 7. Click the **Tentative** option.

Step 8. Click the **Update and Close** button.

Step 9. Click the **More Actions** list.

Step 10. Click the **Change Step/Status** list item.

Step 11. The Post-Offer checks are complete.

Step 12. Click the **Status** list.

Step 13. Click the **Passed Checks*** list item.

Step 14. Click the **Apply and Continue** button.

Step 15. Click the **Apply and Close** button.

Step 16. Notice the Job Submission **- Step** and **Status** has changed to **Hire** and **To be Hired**.

Step 17. This is the Step and Status that is required for the New Hire Interface to identify the candidate file information to move to the CAPPS HR/Payroll system.

Step 18. Congratulations! You have completed this lesson.

Section 3 - Self-Service

Recruit Self-Service

View/Update Candidate and Hire Candidate

Section 3 - Lesson 1, Exercise 1: View/Update and Hire a Candidate

This lesson walks through the steps in Recruiting Self-Service to hire a candidate with the status of "To Be Hired" (last exercise) and populated on the New Hire interface.

Procedure

This lesson will review the process to hire a candidate identified through the CAPPS Recruit process.

Step 1. Click the **Employee Self Service** link.

Step 2. Click the **Recruiting Self Service** menu.

Step 3. Click the **View/Update Candidate** button.

Step 4. The **View/Update Candidate** page displays the candidate information from the **New Hire Interface.**

Step 5. The **New Hire Interface** pulls candidates who have been updated to the **Step/Hire** and **Status/To Be Hired** in the CAPPS Recruiting module. It sends candidates' Personal Data and Job Data from the Offer information to stage in CAPPS HR/Payroll.

Step 6. **New Hire Interface** runs four times a day.

Step 7. This note applies to the Candidate Disposition Status. It provides instructions on what happens when the ***Candidate Disposition Status** is updated.

Step 8. After the **New Hire Interface** stages the data in CAPPS HR/Payroll ***(depending on security access),*** certain individuals will be able to review the data on this page.

Step 9. The **View/Update Candidate** page is used to view/update selected candidates by agency for onboarding.

Step 10. The ***Candidate Disposition Status** is used to indicate the set status of the candidate's record from the CAPPS Recruiting module. The status is used primarily to remove or update candidates from the selection list.

Step 11. The ***Candidate Disposition Status** field is also used to list errors reported by the **New Hire Interface.**

Step 12. The ***Candidate Disposition Status** has <u>three</u> options:

- **Hired:** The Hired status may be set manually for the Valid candidates in case they are hired into CAPPS but through a non-self-service method (they are entered through CAPPS Custom Hire, for example). Changing the status will remove them from the list.

- **Invalid:** This system-generated status means this candidate did not pass the edits setup in the **New Hire Interface**.

  The recruiter will receive an email notifying them of this case. For the system-generated Invalids, the Candidate Disposition Status and Reason are not edible.

  Corrections should be made in CAPPS Recruiting by reverting the candidate’s status(es) and making the necessary corrections. The candidate file will be reprocessed through the New Hire Interface.

  - The **Invalid** status may also be set manually for the **Valid** candidate if the candidate will not be hired and should be removed from the list. A removal may be necessary in the case of a no-show or if other information has been set incorrectly.

  - **Valid**: Valid means that the data passed the edits set up in the New Hire Interface, (i.e., checking for a social security number, the position number is valid, the position number is vacant, the start date is within the allowable timeframe, and the offer salary is within the salary range.

Step 13. Click Save.

Step 14. The next step to prepare a candidate for hire is to review the candidate's Personal, Job and Payroll data.

Step 15. This will be accessed through the **Hire Candidate** page.

Step 16. Let's navigate to the **Hire Candidate** page.

Step 17. Click the **Recruiting Self Service** button.

Step 18. Click the **Hire Candidate** button.

Step 19. The **Hire Candidate** page lists candidates who are pending the onboarding transaction. The data comes from both CAPPS Recruiting and CAPPS HR/Payroll.

Step 20. The **As Of Date** defaults to the system date (current date). This date field is used to display candidates with a **Start Date** within 30 days of the **As Of Date**.

Step 21. **Note:** If the **Start Date** of a candidate is future dated, it is necessary to enter the future **As Of Date** in order to display that candidate's information.

Step 22. Click the **Train01, Martha** link.

Step 23. After selecting a Candidate, their **Personal Data**, **Job Data** and **Payroll Data** pages appear.

Step 24. After the candidate has been reviewed and selected for hire (the user completing the self-service onboarding transition) must verify and validate the personal information, job and compensation-related data.

Step 25. The **Personal Data** tab displays the Candidate's personal information and **National ID.** This information must be reviewed and verified to ensure that no changes have been made since the information was entered in CAPPS Recruiting.

Step 26. Notice the **Empl ID** is set to **NEW**.

Step 27. An employee ID will be assigned after the candidate information has been verified and the record has been successfully saved.

Step 28. *The **Personal Data** tab also shows the* **Info Release Indicators.**

Step 29. The **Info Release Indicators** fields **<u>must</u>** be updated for the selected candidate.

Step 30. When the **Commissioned Peace Officer** box is checked or the employee's data is protected under law, the **Info Release Indicators** cannot be updated.

Step 31. You will select **Yes** or **No** Indicators as appropriate.

Step 32. In this lesson, you will select Release None.

Step 33. Click the **Release None** option.

Step 34. Click the **Job Data** link.

Step 35. The **Job Data** tab displays the candidate's **Organizational** and **Job Related Information**.

Step 36. This information can be verified but not updated on this page. It defaults from the **Position Number** entered in the **Recruiting** module.

Step 37. **Note:** The Position information in Recruiting is sourced from CAPPS HR/Payroll.

Step 38. If the **Organizational Information, Payroll** and/or **Job Information** require updating, it's important to update the ***Candidate Disposition Status** to **'Invalid'** on the **View/Update Candidate** page to reprocess the candidates' file.

Step 39. The Candidate record must be updated in the Recruiting module and reprocessed through the **New Hire Interface.** This is required to maintain consistency between the Recruiting and CAPPS HR/Payroll system.

Step 40. Click the **Payroll Data** tab.

Step 41. The **Payroll Data** page displays the **Payroll** and **Compensation** related information for the new employee.

Step 42. Click the **Save** button.

Step 43. Notice the **Empl ID** has been assigned to the new employee.

Step 44. After the record has been saved, the **Information Center** will display **Messages** related to the Personal and Job Data updates.

Step 45. The section will display both completion and error messages, as appropriate.

Step 46. Congratulations! You have completed this lesson.

Recruit Manager Self-Service

Update to Hire Candidate

Section 3, Lesson 2 - Exercise 1: Update to Hire Candidate

This lesson walks through the steps in Recruit Manager Self-Service to hire a candidate with the status of "To Be Hired" (last exercise) and populated on the New Hire Extract interface file.

Procedure

This lesson will review the process a Manager will use to select and hire a Candidate.

Step 1. Click the **Employee Self Service** button.

Step 2. Click the **Manager Self Service** menu.

Step 3. Click the **Hire Candidate** button.

Step 4. The **As of Date** defaults to the current date. It can be changed as needed.

Step 5. This date field is used to display candidates with a **Start Date** within 30 days of the **As Of Date**.

Step 6. **Note:** If the **Start Date** of a candidate is future dated, it is necessary to enter the future **As Of Date** in order to display that candidate's information.

Step 7. The **Hire Candidate** page displays the recruiting information for the **Valid** candidates to begin the onboarding process.

Step 8. This list of applicants that will be shown is a result of the **New Hire Interface** process. It pulls any candidate who has been updated to the **Step/Hire** and **Status/To Be Hired** in the **Agency Recruiting** module.

Step 9. The New Hire Interface sends both the **Personal Data** and **Job Data** to the **Hire Candidate** page in CAPPS HR/Payroll.

Step 10. **New Hire Interface** runs four times a day.

Step 11. Click the **Train01, Martha** link.

Step 12. After selecting a Candidate, their **Personal Data**, **Job Data** and **Payroll Data** pages appear.

Step 13. After the candidate has been selected for hire, the manager must verify and validate the personal information, job and compensation-related data.

Step 14. The **Personal Data** tab displays the candidate's **Personal Data**, **National ID** and **Info Release Indicators**.

Step 15. Notice the **Empl ID** is set to **NEW**.

Step 16. An employee ID will be assigned after the candidate information has been verified and the record has been successfully saved.

Step 17. The **Personal Data** tab also shows the **Info Release Indicators.**

Step 18. The **Info Release Indicators** fields **must** be updated for the selected candidate.

Step 19. When the **Commissioned Peace Officer** box is checked or the employee's data is protected under law, the **Info Release Indicators** cannot be updated.

Step 20. In this lesson, the **Commissioned Peace Officer** box will not be checked, so the remaining information can be updated.

Step 21. You will select Yes or No Indicators as appropriate.

Step 22. In this lesson, you will select Release None.

Step 23. Click the **Release None** option.

Step 24. After the **Info Release Indicators** has been updated, proceed to verify the **Job Data.**

Step 25. Click the **Job Data** link.

Step 26. The **Job Data** tab displays the candidate's **Organizational** and **Job Related Information**.

Step 27. This information can be verified but not updated on this page. It defaults from the **Position Number** entered in the **Recruiting** module.

Step 28. **Note:** The Position information in Recruiting is sourced from CAPPS HR/Payroll.

Step 29. Verify the **Effective Date** is correct.

Step 30. The remaining information is display only.

Step 31. It is essential that the Recruiter and/or Hiring Manager validate the **Position Number** and **Job Code** details in CAPPS Recruiting when they extend the offer.

Step 32. Click the **Payroll Data** tab.

Step 33. The **Payroll Data** page displays the **Payroll** and **Compensation-**related information for the new employee.

Step 34. This page is also used to save the verified candidate information.

Step 35. The **Payroll** and **Compensation** related information is display-only. The Recruiter and/or Hiring Manager must validate this information in CAPPS Recruiting before extending an offer to the candidate to ensure it appears correct at the time of hire.

Step 36. Click the **Save** button.

Step 37. Notice the **Empl ID** has been assigned to the new employee.

Step 38. After the record has been saved, the **Information Center** will display **Messages** related to the Personal and Job Data updates. The section will display both completion and error messages, as appropriate.

Step 39. Congratulations! You have completed this lesson.

Completing the Hire Candidate Process

Section 3, Lesson 3 - Exercise 1: Completing the Hire Candidate Process

This lesson walks through the final step necessary to update CAPPS Recruiting after a hire has been processed in CAPPS HR/Payroll. This is a critical step in CAPPS Recruiting as it changes the Candidate's final step to "Hired". This reduces the available openings of a position and/or closes the requisition.

Procedure

This lesson focuses on the steps to update the status of a hired candidate.

Step 1. Click the **Candidates Active Submissions Total** link.

Step 2. Select the candidate that is in the Step and Status - Hire/To Be Hire.

Step 3. Click the **Train01, Martha** link.

Step 4. Click the **More Actions** list.

Step 5. Click the **Change Step/Status** list item.

Step 6. The **Change Step and Status** page appears to display the available update options.

Step 7. You would change the Status to Hired - Internal, if that is applicable.

Step 8. **The correct status in this lesson is Hired External*.**

Step 9. **Note: Reaching a status marked with an asterisk (*) completes the step list.**

Step 10. Click the **Apply and Close** button.

Step 11. Click the **Yes** button.

Step 12. Click the **Recruiting** link.

Step 13. Congratulations! You have completed this lesson.