EUT Course - 115

RECRUITING

Taleo Recruit Version 15A

December 2016

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Recruiting

Section 1 - Recruiting Overview

Navigation Fundamentals

Section 1, Lesson 1 Exercise - Scenario 1: Navigation Fundamentals

Procedure

In this lesson, you will learn how to login and navigate through CAPPS Recruiting and become familiar with its functionality.

Action

Step 1. You will see this Legal Agreement page each time you log in and when your system times out after no activity.

The language defaults as English. Do not change the language.

Click the **I Agree** button.

Step 2. During training, you will use the **User Name** as indicated:

Enter the desired information into the **User Name** field. Enter "**TRAINING_USER**".

Step 3. During training, you will use the **Password** as indicated:

Enter the desired information into the **Password** field. Enter "**TRAININGPW**".

Step 4. Click the **Sign In** button.

Step 5. **Note**: This **CAPPS Recruiting Homepage** is for training purposes only.

Menu items within CAPPS Recruiting will vary based on the user's security role.

Step 6. The **Center Stage** - **(Recruiting Home Page)** is the page users will see when they first log into **CAPPS Recruiting**.

Step 7. The **Core Navigation Bar** contains a link to access the **Recruiting Center** and the lists for **Tasks**, **Requisitions**, **Candidates,** and **Offers.**

Step 8. The **Libraries** link provides access to the template library.

The links available are determined by your security role.

Step 9. The **Auxiliary Navigation Bar** contains **Home, Resources (My Setup)**, and **Sign Out**.

Step 10. **Home** relaunches the application and brings you back to the **Recruiting Home Page**.

Step 11. This is the **Quick Search** feature. There is an option to change from **Search Candidate** to **Search Requisition**.

Step 12. **Advanced Search** is also available where you can add additional Search criteria.

Step 13. **Center Stage** contains **Channels** that display status-oriented data about a user's activities.

Step 14. Let's begin with the **Core Navigation Bar** in order to take a more detailed look at the CAPPS Recruiting functionality.

Step 15. The **Recruiting link** will always take you to the **Recruiting Home Page**.

Step 16. The links on the **Core Navigation Bar** also appear within the **Channels** below. Both links will take you to the same place.

Step 17. Click the **Tasks** link.

Tasks are activities that are performed within the Recruit process.

Step 18. This section contains the **Task List**. It displays the Tasks and the corresponding Candidate and/or Requisition. Access/execute the Task by clicking on the Task name.

Step 19. Multiple tasks display in the **Task List.**

Step 20. **Quick Filters** helps to narrow the list of options displaying in the **Task List**.

Step 21. Click the **Show tasks for requisitions** list.

Step 22. Depending on your access, view tasks displayed as follows:

- Tasks assigned to me
- I own
- I collaborate on
- I own or collaborate on

- Tasks for your agency
- All Tasks

Step 23. Click the **Vertical Scrollbar**.

Step 24. Click the **All tasks** list item.

Notice that the **Task List** changed and includes many more tasks.

Step 25. Change the selection back to **Tasks I Own**.

Step 26. Click the **Show tasks for requisitions** list.

Step 27. Click the **Vertical Scrollbar**.

Step 28. Click the **I own** list item.

Step 29. You can **filter** on a specific **Task Type** in order to shorten the task list.

Check the **Quick Filters** settings to display more or less information.

Step 30. Click the **Task Type** list.

Step 31. Click the **To be completed** list item.

Step 32. The Task List changed to display the **"To be Completed"** tasks.

Step 33. Change the **Task Type** to see **All Tasks**.

Step 34. Click the **Drop Down Arrow** button.

Step 35. To clear the **Task Type** so that all Tasks appear, click the **Blank space** list item.

Step 36. To close **Quick Filters**, Click the **Hide the supporting tools** button.

Step 37. Click the **Requisitions** link.

Step 38. This section is the **Requisition List.** This list is used to search, edit, print, and/or change the status of requisitions that you may own or in which you share collaborative ownership.

Step 39. There are **Quick Filters** for the Requisition List. In this case, the filters help to locate requisitions with a specific Status.

Step 40. Click the **Draft** option.

Now the **Requisition List** contains Requisitions having a **Draft** status.

Step 41. To remove the filter for Draft Status, Click the **Draft** option.

Step 42. Click the **Advanced Filters** button.

Step 43. Use the scrollbar to review **Available Criteria** for the Advanced Filter.

Step 44. Click the **Vertical Scrollbar**.

Step 45. Click the **Recruiter** list item.

Step 46. Select an existing Recruiter within the list and then Add.

Step 47. Click the **Cancel** button.

Step 48. To hide the Quick Filters panel, click the **Hide the supporting tools** button.

Step 49. To open the Quick Filter panel back up, click the **Show the supporting tools** button.

Step 50. Click the **Candidates** link.

This page displays the **Candidates List**.

It contains the **Requisition ID** and **Title.** Below it are the **Candidate's names** who have applied to the Requisition (Job).

Step 51. To filter the Candidate list, make selections within the **Quick Filters**.

Step 52. Click the **Candidates** link.

Step 53. The **Internal** option will display the **Internal Candidates** for a requisition that you own or have been assigned.

Click the **Internal** option.

This is an Internal Candidate noted from the selection in Filters but also by the **Organization Icon**. This candidate works within the organization.

Step 54. To remove the filter, click the **Internal** option.

Step 55. Select **Candidates** again to collapse the section.

Step 56. Click the **Candidates** link.

Step 57. Click the **Submissions** link.

Step 58. To display the candidates who are identified as **ACE,** Click the **ACE** option.

Step 59. The **ACE** candidate is listed and identified by the **ACE icon.**

Step 60. To remove the **ACE** filter, click the **ACE** option.

Step 61. To collapse the **Submissions** section, click the **Submissions** link.

Step 62. Click the **Requisitions** link.

The **Requisitions** filter options are also available.

Step 63. Click the **Requisitions** link.

Step 64. Click the **Offers** link.

Currently, there are no **Offers** listed.

This pertains to Offers to candidates for requisitions for which you have access or candidates whom you have added.

Step 65. To remove defaulted filters for the **Offer** list, click the **Delete** option.

Step 66. Click the **Delete** option.

Step 67. Click the **Candidates** link.

Step 68. If there were Offers listed, you could filter using one of the Candidate options. For example, you may wish to view **Offers** for **Internal Candidates.**

Step 69. Select the **Internal checkbox**.

Step 70. Now let's move back up to **Quick Search**.

This is an option to **Search for Candidates or Requisitions**.

Step 71. Click the **Click the drop down** list item.

Step 72. You can select **Candidates, Requisitions, or Specific candidates** for your Search.

Click the **Candidates** list item.

Step 73. Enter the desired information into the **Search Candidate** field. Enter "**pope**".

Step 74. Click the **Search** button.

When there are no matches for your search, you will receive the message above.

Note that wildcards can be used to help with the search.

Step 75. Click the **OK** button.

Step 76. Click the **Resources** link.

Step 77. **My Setup** allows you to view and edit your personal preferences.

Step 78. The same option appears at the bottom of the **Home Page**.

Step 79. Click the **My Setup** menu.

Step 80. Click the **Edit** button.

Step 81. Click the **Vertical Scrollbar**.

Step 82. In the **Account** section, you may change your **Password.**

Step 83. Click the **Cancel** button.

Step 84. Click the **Preferences** tab.

Step 85. Click the **Edit** button.

Step 86. Click the **Vertical Scrollbar**.

Step 87. The **Requisition Display** options are very helpful because if the **Hiring Manager** and/or the **Recruiter** will be the same on all of your requisitions, you can select them here and they will default on the requisition every time.

Step 88. Click the **Open the selector** button.

Step 89. Enter the desired information into the **Email Address** field. Enter "**hiring.manager**".

Step 90. Click the **Refresh** button.

Step 91. Click the **Select** button.

Step 92. Click the **Save and Close** button.

Step 93. Click the **Frequent Approvers** tab.

Step 94. If the **Approvers** on the requisitions that you create will always be the same, you may add them here and they will default when you **Request Approval** for a requisition.

Click the **Add** button.

Step 95. Click in the **Email Address** field.

Step 96. Enter the desired information into the **Email Address** field. Enter "**hiring.manager**".

Step 97. Click the **Refresh** button.

Step 98. Click the **Select** button.

Step 99. Click the **Done** button.

Step 100. Click the **Recruiting** link.

Step 101. The pane to the right is the **Communications Pane**. It includes Helpful information; however, if this pane isn't needed it can be collapsed.

Step 102. Click the **Hide the supporting tools** button.

Step 103. Let's review the information listed within the **Channels.**

The **Candidates** channel is a summarized version of some of the information listed in the Candidate's list.

This information derives from candidates who have applied to a requisition.

Step 104. These two links take you to the same place, the **Candidates List**.

Step 105. Within the **Candidates Channel**, there are statuses and counts for candidates with a certain status.

Step 106. The **Flag** column represents the number of items that are new or have been updated by another user since you last viewed them.

Step 107. The **Total** column number represents the number of items including new, previously viewed, and updated.

Step 108. All three items listed are actual links that open up the candidates who meet the summarized criteria.

Step 109. The **Requisitions** and **Offers** channels work the same way. Each has their own set of statuses.

Step 110. The **Task Channel** is split up by Recruiting and Requisitions.

Step 111. The **Recruiting** section allows you to click on the link **"Tasks assigned to me"** in order to complete what is needed to continue processing.

Step 112. **All staffing tasks** are those tasks that are assigned to others (users can view based on their access).

Step 113. The **Requisitions Tasks** were reviewed previously; this summarizes outstanding tasks.

Step 114. **To Be Completed** - Need to Request Approval

Step 115. **Approve Requisition** - Awaiting your Approval

Step 116. **Ready for Sourcing** - an Approved Requisition that needs to be Posted and Sourced.

Step 117. **Channels** are updated immediately after login, or anytime a user returns to the **Recruit Home Page (Center Stage)**, or when clicking the **Refresh icon**.

Step 118. **Search for Candidates** is the same as those previously mentioned using '**Quick Search**' at the top of the page.

Step 119. **My Setup** is the same as the option available when selecting Resources at the top of the screen.

Step 120. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Section 2 - Recruitment Process Checklist

Requisitions

Requisition List and File

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

Requisitions List

The requisitions list displays requisition information into different columns and provides tools to filter requisitions and to customize the requisitions list.

- *Show requisitions* filter which allows users to filter requisitions using ownership values.

- *Quick filters and Advanced filters* are also provided to filter the requisitions list down to relevant information.

Requisition File

A requisition file details the specific requirements for a job position.

- The left pane contains the requisition card in the top section and supporting information in the bottom section.

Procedure

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

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on the user's security role.

Step 2. In order to look up Requisitions, you can use this Requisitions Link in the Core Navigation Bar or the link within the Requisitions Channel.

Click the **Requisitions** link.

Step 3. This section is the **Requisition List.** This list is used to search, edit, print, and/or change the status of requisitions that you may own or with which you may collaborate ownership.

Step 4. It is possible to Create a Requisition from within this page by selecting the **Create Requisition button**.

Step 5. A **Flag icon** next to a Requisition represents items that you own that require viewing.

Step 6. A **Person** Icon indicates the number of candidates who have applied to a requisition.

Step 7. The Title of the Requisition is listed along with the assigned Requisition ID#.

Step 8. An arrow changes the **Requisition ID** list to **Ascending** or **Descending** order.

Step 9. There is a **Status** and **Status Detail** for all requisitions except for those in Draft status.

Step 10. The **Envelope** icon indicates the number of candidates who received a job posting notification.

Step 11. The star indicates that the **ACE** option has been applied to this requisition.

Step 12. The **Recruiter** and **Hiring Manager** who were assigned to the Requisition are also listed.

Step 13. To open up a requisition file, click on the requisition title.

Click the **Title - Quality Assurance Spclst IV** link.

Step 14. A requisition file details the specific requirements for a job position. It contains several sections that are available for viewing and/or editing:

1) Requisition Structure
2) Process
3) Job Information
4) Job Description
5) Questionnaire

Step 15. To view the remaining sections, click the **Vertical Scrollbar**.

Step 16. The arrows expand each section. These sections will be covered under Create Requisitions.

Step 17. The left pane contains the **Requisition Card** in the top section and **Supporting information** in the bottom section.

Step 18. Within the Requisition Card, the number is an indicator of the number of candidates who have applied for a requisition.

Click the **Number** link.

Step 19. The number link opens up the candidates list for the specific requisition. No matches are found because the number indicates zero.

Note: The requisition is not posted yet, so applicants are not able to apply.

Step 20. To get back to the **Requisition List**, Click the **Up to the requisition list** button.

Step 21. The **Quick Filters** panel enables the user to filter by ownership values as well as requisition status.

Step 22. The **Show requisitions filter** enables the user to list requisitions by one of the following ownership designations:

...I own
...I collaborate on
...I own or collaborate on
...Department of Job

Step 23. The **Status** option is used to list requisitions with specific statuses.

Step 24. To close the **Quick Filter** panel, click the **Hide the supporting tools** button.

Step 25. To expand the **Quick Filters** panel, click the **Show the supporting tools** button.

Step 26. To expand the **Communication and Help** panel, click the **Show the supporting tools** button.

Step 27. To hide the panel, click the **Hide the supporting tools** button.

Step 28. Congratulations! You have successfully completed this lesson. **End of Procedure.**

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.

The following scenario will be used:

1) You will create a requisition using Requisition Template - Contract Admin Job Code 0000XXXX-X060.
2) The Hiring Manager you will assign to the Requisition is Hiring.Manager
3) Fill in the Job Information:
Travel - None
Shift - Compressed Weekend
Target Start Date - November 30th

Action

Step 1. **Note**: The CAPPS Recruiting (home page) you see here is for training purposes only and may display more or less functionality (options) than you will see in your environment.

The home page view will vary according to your role.

Step 2. Click the **Create Requisition** button.

Step 3. Selection of a **Requisition Template** is required.

Click the **Selection** button.

Step 4. This page contains a list of Requisition Templates. This list can be reviewed by using the vertical scrollbar or a quick method is to use the **Quick Filters** to shorten the list.

Step 5. In order to locate the template, enter information in one of the **Quick Filter** fields.

Enter a few characters of the Job Code.

The job code on the requisition template consists of the position number, plus an hyphen, followed by the agency-specific job code.

Enter the desired information into the **Job Code** field. Enter "**XXXX-XX60**".

Step 6. For the **Quick Filter** to work, click the **Refresh** button.

The search results are listed. You will be using **Job Code 0000XXXX-X060**.

Step 7. The **Requisition Title** link opens up the Requisition Template.

Outside of training, if you don't wish to view the template, skip this step.

Click the **Contract Administration...** link.

Step 8. Use the dropdown arrow to move to Page 2.

Step 9. Click the **Down Arrow** object.

Step 10. To close this page and return to the Requisition Search Selection,

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

Step 11. Note: In order to select a template, use the **Select** button.

Click the **Select** button.

Step 12. The **Requisition Template** field is auto-populated from the selection on the previous page.

Step 13. The Hiring Manager is a required field.

Step 14. Click the **Selection** button.

Step 15. In this example, you will enter a few characters of the email address to find the **Hiring Manager**.

Enter the desired information into the **Email Address** field. Enter "**hiring.manager**".

Step 16. Click the **Refresh** button.

Step 17. All email addresses containing hiring manager are displayed.

Step 18. Click the **Select** button.

Step 19. Click the **Next** button.

Step 20. This page automatically populates the **Organization** and **Primary Location** according to your security access.

Step 21. The **Job Field** populates according to the specific Requisition Template that was selected.

Step 22. If an additional Location needs to be added, select the **Add Locations** button.

Step 23. Click the **Create** button.

Step 24. This is the start of the **Requisition File**. Many fields are auto-populated from the Requisition Template; however some fields must be manually entered and/or changed.

Step 25. The top panel is the **Requisition Card.** The requisition number will appear once the requisition is saved.

Step 26. The **Status** changes to reflect the action taken on the Requisition.

Step 27. Once the requisition is posted and candidates begin applying, **this number represents the number of candidates who have applied to the requisition**.

This number is also a hyperlink that will display the **Candidate's list**.

Step 28. To move down the page, click the **Vertical Scrollbar**.

Step 29. **Section 1 - Requisition Structure**

The following fields in Section I of the **Requisition** are auto-populated from the Requisition Template:

1) Requisition Title
2) Number of Openings (may need to be increased)
3) Justification (may need to be changed)
4) State Job Code
5) Position Number (additional numbers can be added below the existing position number)

Step 30. Click the **Down Arrow** dropdown button to activate the menu.

Step 31. There are various **Justifications** that can be selected. Use the scrollbar to find the appropriate justification.

Click the **Vertical Scrollbar**.

Step 32. In this example, the **Justification** will be **New Position**.

Click the **New Position** list item.

Step 33. Add additional Position Numbers under the existing number, if applicable.

For this example, we will only use the existing Position Number.

Step 34. Click the **Vertical scrollbar**.

Step 35. **User Group** populates according to the Requisition Template that was created.

Step 36. The **Structure** auto-populates the Organization, Primary Location and Job Field that were entered prior to selecting the Create Requisition button.

Step 37. Click the **Vertical Scrollbar**.

Step 38. The **Owners** of the Requisition are auto-populated according to the user and the Hiring Manager who were selected.

If they require changing, you may use the **Selection button.**

Step 39. Click the **Vertical Scrollbar**.

Step 40. **2.** The **Process** section populates the **Candidate Selection Workflow (CSW)**. The same **CSW** is used for all Requisitions.

Step 41. The checkboxes for **Automatically Rejecting** can be deselected, if applicable.

It is recommended that you leave these selected.

Step 42. Click the **Vertical Scrollbar**.

Step 43. **3. Job Information,** the requisition template auto-populates the following fields for the Profile:

1) **Employee Status**
2) **Job Type**

3) **Job Level**
4) **Schedule and**
5) **Standard Hrs per week**

Step 44. The following fields may need to be manually updated, only if applicable:

- **Travel**
- **Shift and**
- **Target Start Date**
-

Step 45. Click the **Travel** list.

Step 46. Click the **No** list item.

Step 47. Click the **Shift** list.

Step 48. Select the **Shift** that is appropriate for the job. For training purposes,

Click the **Compressed Weekend** list item.

Step 49. Click the **Calendar Icon** button.

Step 50. Click the **November 30** link.

Step 51. Click the **Vertical Scrollbar**.

Step 52. The **Compensation** fields are auto-populated by the Requisition Template. This information defaults from the job code.

1) **Currency**
2) **Pay Basis**
3) **Minimum Salary (change only if applicable)**
4) **Maximum Salary (change only if applicable)**
5) **Salary Admin Plan**
6) **Grade**
7) **Step**

***If the Min and Max Salary are changed you must stay within the Salary Range. It is recommended that the other fields are not changed.**

Step 53. Click the **Vertical Scrollbar**.

Step 54. **Section 4. Job Description** contains areas for you to enter the **Internal/External Descriptions** and **Qualifications** for the position.

Step 55. To enter text for the **External Description**, click the **Edit** button.

Step 56. Within this area, you can type the text or copy and paste the text.

Step 57. For training purposes, enter the desired information into the field. Enter "**Enter External Description**".

Step 58. Click the **Done** button.

Step 59. To enter the **External Qualifications,** click the **Edit** button.

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

Step 61. Click the **Done** button.

Step 62. If the **Internal Description** and **Qualifications** will be the same as External, you can use the **Copy From** option.

This prevents you from having to type this information again.

Click the **Copy From** button.

Step 63. This page is confirming what information should be copied and pasted.

The field is currently empty, so select the **Paste Information only if the field is empty** option.

Step 64. Click the **Done** button.

Step 65. Click the **Vertical Scrollbar**.

Step 66. **5. Questionnaire Section -** This is the prescreening section of the Requisition. The top section contains **Disqualification Questions**.

Note: Only recruiters *will* see the Questionnaire section when creating a requisition. A **full service manager *will not*** see the Questionnaire section.

Step 67. Click the **Vertical Scrollbar**.

Step 68. The second section contains (14) **Prescreening questions** that auto-populate onto the requisition.

This will read 0 of 14 questions until after you Save.

Step 69. The **Questions** section provides an **Answer** column for Yes/No, multiple choice or fill-in responses.

Step 70. This section enables the user to set the **Required** and **Asset** criteria based on the answer options of each question.

Not Applicable - Not Applicable means that the question does not require an answer from the candidate to be considered for the job. It is also the default setting for all Required/Assets criteria question.

Required - A Required criterion means that the answer to a question absolutely has to be selected for the candidate to be considered for the job. *This places a candidate into an ACE category.*

Asset - 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 distinguishes the candidate from others.

Step 71. Click the **Required** list item.

Step 72. Click the **Vertical Scrollbar**.

Step 73. Click the **Vertical Scrollbar**.

Step 74. Click the **Vertical Scrollbar**.

Step 75. The current license State should be Texas, Click the **Required** list item.

Step 76. Click the **Vertical Scrollbar**.

Step 77. Click the **Required** list item.

Step 78. Click the **Vertical Scrollbar**.

Step 79. Click the **Required** list item.

Step 80. Click the **Required** list item.

Step 81. Click the **Vertical Scrollbar**.

Step 82. Click the **Required** list item.

Step 83. Click the **Vertical Scrollbar**.

Step 84. Click the **Required** list item.

Step 85. You have completed filling out the requisition. Use the **Diagnostic Tool** to check for any missing information.

Step 86. Before you are able to Save, the information must be entered.

Step 87. Click the **Diagnostic** button.

Step 88. The **Diagnostic** indicates that the **File is ready for Saving.** After Saving it is Ready for Approval and After Approval it is Ready to Post.

Step 89. **Save** --- Saves the Requisition in **Draft** status and leaves it open for additional editing.

Save and Close - Saves the requisition in **Draft** Status, closes the requisition and opens up the Requisition File with tab options.

Step 90. Click the **Save and Close** button.

Step 91. On the **Requisition Card** to the left, note that the **Requisition** was **Saved** and is in **Draft Status**.

A **Requisition ID#** has been assigned.

Step 92. The **Requisition File** is closed but can still be edited by clicking the **Edit** button.

Step 93. Tabs appear at the top of the Requisition File. Depending upon your access you may not see all of them.

Alerts allows you to set the **ACE** candidate alert which will inform users when a candidate meets specific required criteria.

Attachments allow you to attach a file to the requisition.

Posting and Sourcing is available after the requisition has been approved. It provides access to Posting and Sourcing features.

History - Contains a log of all actions performed on the requisition file.

Interviews - Allows users to add evaluation questionnaires and view completed questionnaires as well as feedback provided by evaluators.

Step 94. This requisition is ready to be submitted for Approval.

Click the **More Actions** dropdown button to activate the menu.

Click the **Request Approval** menu.

Step 95. If the **Approver** was set up under My Settings, their name would automatically appear as **Approver** in this area.

In this example, you will use **Quick Filters** to find the **Approver** in order to add them**.**

Step 96. Enter the desired information into the **Email Address** field. Enter "**Production.Support**".

Step 97. Click the **Refresh** button.

Step 98. Click the **Select** button.

Step 99. Once selected, the Approver appears in the Request Approval window in Pending status. If more than one (1) approver is needed, complete these steps again.

Step 100. When there is more than one (1) approver listed, the Order column allows you to change the order of the listed approvers. The requisition must be approved according to the order number.

Step 101. To remove this approver and select another, click the **(x)** next to the Approver's name.

You may have to hover over the Approver name for the **(x)** to appear.

Step 102. When Requesting Approval - **Comments** are Required.

Step 103. Enter the desired information into the **Comments** field. Enter "**Please approve ASAP so that this position can be posted.**"

Step 104. To Save the Request for Approval, Click the **Done** button.

Step 105. The Requisition Card indicates that the Requisition is in **Pending Status - To Be Approved.**

Step 106. Congratulations! You have successfully completed this lesson.
End of Procedure.

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.

The following scenario will be used:

1) Duplicate Requisition Number 00000074 (SOT Sr Account Manager2).
2) The Target Start Date will be December 14th.
3) The existing Approver will be deleted and Hiring Manager will be added as the Approver.

Action

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

Step 2. One of the options for searching for requisitions is scrolling through the list. Click the **Vertical Scrollbar**.

Step 3. Once the **Requisition ID** is located, you will use the drop down arrow that appears next to the Requisition ID.

Click the **Dropdown arrow** option.

Step 4. Click the **Duplicate this requisition** menu.

Step 5. Review the entire requisition to see if there are any fields that need editing.

Note: Some requisitions have more than 1 job opening and/or more than 1 position number. Please be sure to review and edit these fields, if applicable.

Step 6. Click the **Vertical Scrollbar**.

Step 7. The **Target Start Date** needs to be changed in this example.

Click the **Calendar** link.

Step 8. Click the **Right arrow for December**.

Step 9. Click the **14th** link.

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

Step 11. The requisition is saved in **Draft** status and has been assigned a **Requisition ID**.

Step 12. Click the **More Actions** link.

Step 13. The **Request for Approval** must be checked and submitted. Since this requisition was duplicated the previous Approvers are stilled tied to it.

Click the **Request Approval** menu.

Step 14. If the approver is different then you must remove the existing and add a **New Approver**.

Step 15. Click the **(X) Delete** button.

Step 16. Click the **Add Approvers** button.

Step 17. Enter the desired information into the **Email Address** field. Enter "**Production.Support**".

Step 18. Click the **Refresh** button.

Step 19. Click the **Select** button.

Step 20. Enter the desired information into the field. Enter "**Please Approve**".

Step 21. To Save the Request Approver changes, Click the **Done** button.

Step 22. The Requisition Status has changed to **Pending.**

Step 23. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Canceling and Reopening a Requisition

Section 2, Lesson 1 Exercise - Scenario 4: Canceling and Reopening 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.

In order to reopen a requisition, the status must be Cancelled. A reopen does not apply to requisitions that were in a draft status when cancelled.

Procedure

In this lesson, you will learn how to Cancel and Reopen a requisition.

The following scenario will be used:

1) You will Cancel Requisition #0000074
2) You decide that you need to use the requisition after all, so you will Reopen Requisition #00000074 - SOT Sr Account Manager 2.

Action

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

Step 2. Find **Requisition Number 00000074** in the requisition list.

Step 3. Click the **Drop Down Arrow** button.

Step 4. Click the **Cancel Requisition** menu.

Step 5. Enter the desired information into the **Comments** field. Enter "**Please cancel and reopen later.**"

Step 6. To save the cancel request, click the **Done** button.

Step 7. Click the **Up to the requisition list** button.

Step 8. Now you will search for the **Canceled Requisition** so that you can reopen it.

Use **Quick Filters** to find the Requisition.

Step 9. Cancelled requisitions are **Inactive**.

Click the **Include inactive requisitions** option.

Step 10. Click the **Status** link.

Step 11. Click the **Canceled** option.

Step 12. The requisition list now consists of all Requisitions with a Status of **Canceled.**

Step 13. For Requisition ID - 0000074, click the **Drop Down Arrow** button.

Step 14. Click the **Reopen Requisition** menu.

Step 15. Enter the desired information into the **Comments** field. Enter "**Reopen for processing.**"

Step 16. To save the Reopen request, click the **Done** button.

Step 17. Congratulations! You have successfully completed this lesson.
End of Procedure.

Printing a Requisition

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

Print Mode

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.

The following scenario will be used:

1) Print requisition #00000216

Action

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

Step 2. To select the requisition, click the **Checkbox** option.

Step 3. Click the **Print** link.

Step 4. In the **Selection** section, you may print **All requisitions** that exist in the Requisition List or just the **Selected requisition**.

Step 5. In the **Content** section, you may print the **Requisition List only** or the **Requisition file details**.

Step 6. Click the **Requisition file details** option.

Step 7. You may print all of the details of the Requisition or a select few. Deselect any details that should not be printed.

In this example, you won't print **Alerts.**

Click the **Checkbox** option.

Step 8. You can also determine what **Order** the information appears when it is printed.

Step 9. Click the **Print (PDF)** button.

Step 10. Use the **Save Icon**, to save the file on your computer.

Step 11. Use the **Printer Icon**, to print the requisition information that was selected.

Step 12. Use the **Down Arrow**, to view the remaining pages.

Step 13. Click the **Down Arrow** object.

Step 14. Click the **Down Arrow** object.

Step 15. Click the **Down Arrow** object.

Step 16. Click the **Down Arrow** object.

Step 17. Click the **Down Arrow** object.

Step 18. Click the **Down Arrow** object.

Step 19. Click the **Close Tab (Ctrl+W)** button.

Step 20. Congratulations! You have successfully completed this lesson.
End of Procedure.

Add Questions

Adding New Questions to a Requisition

Section 2, Lesson 2 Exercise - Scenario 1: Adding New Questions to a Requisition

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).

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

NOTE:

When a question is a single answer question, the candidate will only check one answer. If a Bachelor's Degree is required, you must mark that answer and all answers greater than that answer as required. If you do not do this, a candidate that answers Master's degree will not be recorded by the system as having met the requirement, even though candidates with a Master's degree do meet the minimum requirement of a Bachelor's Degree.

Procedure

In this lesson, you will learn how to add a new question to a requisition.

The following scenario will be used:

1) Add a question to Requisition #00000248. It is in Draft status.

Question: What is your highest level of education?
Possible answers: Bachelor's, Master's, and Doctorate Degrees

Action

Step 1. Click the **Draft** button.

Step 2. Find Requisition ID - 00000248

Step 3. Click the **Drop Down Menu** button.

Step 4. Click the **Edit** menu.

Step 5. Click the **Vertical Scrollbar**.

Step 6. **Pre-existing questions** can be added from the Questions Library using this Add option.

Step 7. To remove a question, you would select the question and select Remove.

Step 8. This Reorder icon allows you to change the order of how questions will appear.

Step 9. To **Duplicate** a question, you would select the question and then select the Duplicate icon.

Step 10. The Add a Requisition Specific icon allows you to select a question from the Question Library and change it to a requisition specific question.

Step 11. This icon allows you to **Create a New Question**. This question will only exist on this particular requisition. It does not save it in the Question Library.

Step 12. Click the **Create a question** link.

Step 13. This page allows you to assign the **Question,** an **Answer Type** and how the **Answers** should be **Displayed.**

Step 14. Click the **Answer Type** list.

- **Single Answer** - A question that only requires one answer.
- **Multiple Answers** - A question that can have more than one answer.
- **Text Answer** - A question that requires the answer to be typed into a field (possibly multiple lines of text).

Step 15. You must determine an **Answer Type** for each question that you add.

Click the **Single Answer** list item.

Step 16. For the **Answer Display**, you may select **Radio buttons** or a **Pop-up list**.

Click the **Radio Buttons** option.

Step 17. Click in the **Question** field.

Step 18. Enter the desired information into the **Question** field. Enter "**What is your highest level of education?**"

Step 19. Click in the **Possible Answers** field.

Step 20. Enter the desired information into the field. Enter "**Bachelor's Degree**".

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

Step 22. Enter the desired information into the field. Enter "**Doctorate Degree**".

Step 23. If the order of the list of possible answers need to be changed, use the Order Number drop-down arrow and change accordingly.

Step 24. You must select the Reorder button after changing the order to see the changes.

Step 25. Click the **Save and Close** button.

Step 26. You will need to assign the Answers to the question as Required.

The question will appear last in the list.

Step 27. Click the **Vertical Scrollbar**.

Step 28. Click the list.

Step 29. The position requires a Bachelor Degree.

Click the **Required** list item.

Step 30. Click the list.

Step 31. The candidate may have a Master Degree but they won't show up as meeting the requirement for a Bachelor's unless it is assigned Required as well.

Click the **Required** list item.

Step 32. Click the list.

Step 33. The candidate may have a Doctorate Degree but they won't show up as meeting the requirement for a Bachelor's, or Master's unless it is also assigned Required.

Click the **Required** list item.

Step 34. Click the **Save and Close** button.

Step 35. Congratulations! You have successfully completed this lesson.
End of Procedure.

Adding an Alert for ACE

Section 2, Lesson 2 Exercise - Scenario 2: Adding an Alert for ACE

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.

Procedure

In this lesson, you will learn how to apply the ACE Candidate Alert to a requisition.

The following scenario will be used:
1) Open Requisition ID - 00000248
2) Review the Question section and identify any answers that should be identified as Assets.
3) Require that the Alert finds candidates meeting 2 of the 4 existing assets.
4) Set the email alert to go to the Hiring Manager.

Action

Step 1. Click the **Draft** button.

Step 2. To open Requisition ID - 00000248, click the **Access & Identity Mgmt Analyst** link.

Step 3. Review the questions and determine which should be assigned as assets.

The alert only works when assets are designated.

Step 4. Click the **Edit** button.

Step 5. Click the **Vertical Scrollbar**.

Step 6. Question #1 is already listed as an Asset.

Step 7. Click the **Vertical Scrollbar**.

Step 8. Click the list item.

Step 9. Click the **Asset** list item.

Step 10. Click the **Vertical Scrollbar**.

Step 11. Click the list.

Step 12. Click the **Asset** list item.

Step 13. Click the list.

Step 14. Click the **Asset** list item.

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

Step 16. Click the **Alerts** tab.

Step 17. Click the **Modify Alert** button.

Step 18. This page 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**.

Click the list.

Step 19. For this example, you would like the candidate to have at least 2 out of the 4 asset questions answered correctly.

Click the **2** list item.

Step 20. Click the **Next** button.

Step 21. If you would like the **ACE Candidate Alert** sent via email then you would find and select the recipient's name.

Click in the **Email Address** field.

Step 22. Enter the desired information into the **Email Address** field. Enter "**Hiring.Manager**".

Step 23. Click the **Refresh** button.

Step 24. Click the **Select** button.

Step 25. The Recipient name is populated.

Step 26. Click the **Done** button.

Step 27. The **ACE Candidate Alert** is set along with the recipient that will receive the Alert.

Step 28. Congratulations! You have successfully completed this lesson.
End of Procedure.

Approve Requisition

Approving a Requisition

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

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:

1) You will approve Requisition ID - 00000216 - Contract Administration Mgr I.

- Include comment: Please post asap
- Request for an email to be sent of your approval decision.

Action

Step 1. There are three different ways to respond to a Request for Approval. This response is via email.

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

Step 3. To move down the page, click the **Vertical Scrollbar**.

Step 4. It is important to review the **Requisition Details** prior to Approving or Rejecting a requisition.

Click the **Requisition Details** link.

Step 5. There is 1 of 6 pages that can be reviewed for details of this Requisition.

To go to the next page, click the **Drop Down Arrow** object.

Step 6. In this example, we will skip reviewing the Questionnaire pages.

Note: Hiring Managers will not see the Questionnaire section.

Step 7. Click the **Close Tab (Ctrl+W)** button.

Step 8. Click the **approval request option** list.

Step 9. You can either Approve this Requisition or Reject it.

Note: The **"I approve this requisition"** option is the default and will automatically populate in this field unless you change it.

Click the **I approve this requisition** list item.

Step 10. **Comments** can be entered but are not required unless you are Rejecting the requisition.

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

Step 11. If you would like an email of your decision sent to you, click the **Send me an email with my decision** option.

Step 12. To Save your Approved response, Click the **Done** link.

Step 13. Click the **Exit** link.

Step 14. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Rejecting a Requisition

Section 2, Lesson 3 Exercise - Scenario 2: 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 using the Task Channel/Task List method.

1) You will reject Requisition #00000186.

- Enter Comment: Please correct the job qualification.
- Request for an email to be sent of your approval decision.

Action

Step 1. You will know through the Task Channel if a requisition is awaiting your Approval.

Step 2. From the Task List, click the **Approve Requisition** link.

Step 3. It is important to review the **Requisition Details** prior to Approving or Rejecting a requisition.

Click the **00000186 Requisition** link.

Step 4. Click the **Down Arrow** object.

Step 5. Click the **Vertical Scrollbar**.

Step 6. In this example, we will skip over reviewing the Questionnaire section.

Note: Hiring Managers will not see the Questionnaire section.

Step 7. Click the **Close Tab (Ctrl+W)** button.

Step 8. Click the **Decision** list item.

Step 9. Click the **Reject** list item

Step 10. Comments are required when Rejecting a requisition.

Enter the desired information into the field. Enter "**Please correct the job qualifications.**".

Step 11. If you would like an email of your decision, click the **Checkbox** option.

Step 12. To Save your Reject decision, click the **Done** button.

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

Step 14. Currently, the **Approve Requisition link** is still listed in the Task Channel with a Total of 1.

Step 15. A **Refresh** will update the information on this page with the latest changes.

Click the **Refresh** button.

Step 16. The **Approval Requisition link** is no longer listed. This means that you don't have any additional requisitions awaiting your approval.

Step 17. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Post

Posting Job

Section 2, Lesson 4 Exercise - Scenario 1: Posting Job

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 Contextual action menu in the requisitions list.
- 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 - 000000216 - Contract Manager I.

Action

Step 1. Under the **Task Channel**, you will find tasks that are waiting for you to handle.

Step 2. In this exercise, you will Post and Source a requisition that is **Ready for Sourcing**.

Click the **Ready for sourcing** link.

Step 3. You can select either the **Ready for Sourcing link** or the **Requisition ID**.

Click the **Ready for Sourcing** link.

Step 4. The **Posting and Sourcing** tab is already selected and waiting to be modified in order to Post and Source the requisition.

Click the **Modify** button.

Step 5. Review the **Posting Requisitions** page to ensure that the **Career Sections** are correct and the **Start and End Dates** are accurate.

Step 6. The **Career Section** lists the different areas where the posting will appear.

One of the sections will always be for your specific Agency. Agencies will only see the CAPPS and their agency Career Sections.

Step 7. Visibility tells you whether the posting is visible Internally (employees) and/or Externally (public).

Step 8. To move to the right, click the **Horizontal Scrollbar**.

Step 9. The **To be Posted** checkboxes should be checked in order to **Post.**

Step 10. To save the settings on the page, click the **Done** button. The Posting information now appears under **Services - Career Sections**.

Step 11. The **Requisition Status Details** indicate that this requisition is now **Posted.** The job is now available for applicants to apply.

Step 12. You will be able to determine if any **candidates applied** to the requisition by the **number indicator**.

Clicking on the **number** will open up the **Candidate's list** for this requisition.

Step 13. Congratulations! You have successfully completed this lesson. **End of Procedure.**

UnPosting Job

Section 2, Lesson 4 Exercise - Scenario 2: UnPosting Job

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 job.

The following scenario will be used:

1) Unpost Requisition ID – 00000197 - Purchaser VI.

Action

Step 1. There are various ways to find the requisition in order to UnPost it. You will look under **Requisitions** in an **Open** status.

Click the **Open** link.

Step 2. For Requisition ID - 00000197, click the **Drop Down Arrow** button.

Step 3. Click the **Posting and Sourcing...** list item.

Step 4. Click the **Modify** button.

Step 5. Click the **Horizontal Scrollbar**.

Step 6. Deselect the checkmark for all of the **Posted** rows.

Step 7. Click the **Posted Checkbox** option.

Once the checkbox is unchecked, the **Posting Status** changes to "**To be unposted**".

Step 8. Click the **Posted Checkbox** option.

Step 9. Click the **Posted Checkbox** option.

Step 10. Click the **Posted Checkbox** option.

Step 11. To save the To Be Unposted changes, click the **Done** button.

The **Status Details** of this requisition is now **Unposted.**

Applicants will no longer see the posting.

Step 12. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Extending a Posting

Section 2, Lesson 4 Exercise - Scenario 3: Extending 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 - 00000085 - SOT - Auditor VI

Action

Step 1. Click the **Extend Posting?** button.

Step 2. Click the **0000008- SOT Auditor VI** link.

Step 3. Click the **Modify** button.

Step 4. Click the **End Date Field** dropdown button to activate the menu.

Step 5. You can use the calendar to select a date or use the drop down options.

Click the **14 days later** list item.

Step 6. Click the button to the right of the **End Date** field.

Step 7. Click the **14 days later** list item.

Step 8. Click the button to the right of the **End Date** field.

Step 9. Click the **14 days later** list item.

Step 10. Click the button to the right of the **End Date** field.

Step 11. Click the **14 days later** list item.

Step 12. Click the **Horizontal Scrollbar**.

Step 13. To save the extended dates entered, click the **Done** button.

Step 14. To check the history of activity for this requisition, click the **History** tab.

Step 15. The dates and events for the Requisition are displayed. The latest event is the **Posting Extended**.

Step 16. Click the **Recruiting** link.

Step 17. Use the refresh so the Task Channel can update the Extend Posting. The total should change from 2 to 1.

Click the **Refresh** button.

Step 18. The **Extend Posting** now has a count of (1).

Step 19. The **Task list** is updated from extending the dates of the requisition.

Step 20. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Manage Candidates

Candidate File and List

Section 2, Lesson 5 Exercise - Scenario 1: Candidate File and List

Candidate File

A candidate file is a form containing candidate information such as personal information, work experience, certifications, references, EEO information and screening information.

A *candidate file* is organized into three sections:

- The left pane contains the *candidate card* in the top section and supporting information in the bottom section. The card can be flipped and the pane can be expanded or collapsed using the icon.

- The right pane contains supporting tools such as the *online help*. The pane can also be expanded or collapsed.

- The center pane displays the candidate form.

Candidates List

The Candidates list displays the list of candidates by requisitions, summary candidate file information and provides tools to filter candidates and to customize the candidates list. Candidates will only appear in the list if they are attached to a requisition.

The C*andidates list* may be displayed by the *Show* filter which allows users to filter candidates using ownership values. *Quick filters* and *advanced filters* are also provided to filter the candidates list down to relevant information.

Procedure

In this lesson, you will learn how to view a list of candidates and the details of a candidate file.

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on the user's security role.

Step 2. This is the CAPPS Recruiting Home Page. It enables a user to view Candidate, Requisition, Offers and Tasks information.

Step 3. This lesson will focus on viewing the **Candidates** file and list.

Step 4. Click the **Candidates** link to access the candidates list.

Step 5. The **Candidates** page is used to list, search and view candidate details.

Step 6. The **Quick Filters** panel enables the user to filter by ownership values as well as candidate, submissions and requisition details as desired.

Step 7. The **Show candidates for requisitions:** filter enables the user to list requisitions by one of the following ownership designations:

...I own
...I collaborate on
...I own or collaborate on
...All candidates

Step 8. Click the **Show candidates for requisitions:** dropdown arrow.

Step 9. Click the **All candidates** list item.

Notice **all** candidates attached to a requisition are listed by requisition number.

NOTE: Only candidates attached to a requisition will be displayed.

Step 10. The **Candidates** home page provides the ability to sort and filter the candidates based on **Candidate**, **Submissions** and **Requisitions** detail.

Step 11. Click the scrollbar.

Step 12. Click candidate **SOT_test2, Test (10218)**

The candidate's details are available to view.

Step 13. The main content of the candidate file is within the **Job Submission** and **General Profile** tab.

Step 14. The **Job Submission** profile includes candidate name, the threshold count of ACE questions and the candidate's Candidate Selection Workflow (CSW) position.

Step 15. Click the **View the General Profile** tab.

Step 16. The **General Profile** displays the candidate's personal contact information.

Step 17. Click the **View the Job Submission** tab to return to the Job Submission.

Step 18. The requisition for which the candidate applied is identified.

Step 19. Each Candidate file section expands to view their application details related to:

- Personal Information
- Resume
- Submission Information
- Profile Information
- Experience and Credentials
- Job Questionnaire
- References

Step 20. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Candidate Action (Edit and Print)

Section 2, Lesson 5 Exercise - Scenario 2: Candidate Action - Edit and Print

There are several actions associated with maintaining a candidate's file. This lesson will focus on the Edit mode and Print mode actions.

Edit Mode

In edit mode, all fields included in the candidate form are displayed to update as needed. Required fields are highlighted with a red (*) asterisk.

Print Mode

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 Candidates list and within Candidate files. When using the print function, users can decide to print a summary listing of candidates or requisitions, or they can choose to print the details of the file where content is presented into sections.

NOTE: A maximum of 1000 lines can be printed in the list. 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 perform the edit and print **Candidate Actions**.

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on the users security role.

Step 2. The Recruit Home page provides access to Candidates, Offers, Requisitions and Tasks details.

Step 3. To edit a candidate's file, let's access the **Candidates** section of the Recruit home page.

Click the **Candidates** link.

Step 4. The **Candidates** page displays a list of candidates sorted by requisition that is owned by the user.

Click the **SOT_test2, Test (10218)** link.

Step 5. The detail of the candidate's file is displayed in view only mode.

Step 6. Click the **Edit** button.

The **Candidate's** file now opens in **edit** mode. In edit mode, all fields included in the candidate form are open to update, as needed.

Step 7. Required fields are highlighted with a red (*) asterisk.

Step 8. Click in the **Address (line 2)** field.

Step 9. Enter the desired information into the **Address (line 2)** field. Enter "**Floor 20**".

Step 10. Click the scrollbar.

Step 11. The **Resume** section is open in the edit mode.

Step 12. Click the scrollbar.

Step 13. The **Submission Information** and **Profile Information** are available for update as needed.

Step 14. Click the scrollbar.

Step 15. Click the scrollbar.

Step 16. The **Experience and Credentials** and **Job Questionnaire** section are available for update as needed.

Step 17. Click the scrollbar.

Step 18. The **References** section is available for update as needed.

Step 19. Click the **Save** button.

Step 20. Notice the **Address (line 2)** has been updated to '**Floor 20**'.

Step 21. Now that the candidate's file has been successfully updated, let's print the file.

Step 22. The **Candidate's** file page provides **action** icons related to updating the candidate list or file.

Step 23. Click the **Printer** icon.

Step 24. The **Print Configuration** page provides options to print selected items from the candidate's file.

Step 25. Based on the desired printout, a user may click the appropriate section checkbox(es).

NOTE: At least one section must be checked to print candidate information.

Step 26. Let's scroll down to view additional information that may be printed from the candidate's file.

Step 27. Click the scrollbar.

Step 28. Click the scrollbar.

Step 29. Click the scrollbar.

Step 30. Click the **Print (PDF) button.**

Step 31. This button converts the selected data to a PDF file for printing.

The **Candidate Information** form is created in a PDF format.

Step 32. Click the scrollbar.

Step 33. Click the scrollbar.

Step 34. Click the scrollbar.

Step 35. Click the scrollbar.

Step 36. **History** of the changes made to the candidate's file is available as a print option.

Step 37. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Candidate Creation

Section 2, Lesson 5 Exercise - Scenario 3: 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.

The creation of candidates is done via the Create Candidate process available on the CAPPS Recruiting home page.

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.

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on the users security role.

Step 2. This is the CAPPS Recruiting Home Page. It enables users to view Candidates, Requisitions, Offers and Tasks information.

Step 3. This lesson will focus on creating a **Candidate's** profile.

Step 4. Click the **Create Candidate** button.

Step 5. The **Create a Candidate** page displays the file creation options.

- **Create a General profile:** For candidates who have not completed a job-specific submission.

- **Create a job-specific submission:** For candidates who have submitted a profile for a specific requisition.

Step 6. Click the **Create a job-specific submission** option.

Step 7. Click the **Next** button.

Step 8. The **Create a Candidate** page enables the user to select a job-specific requisition for candidate.

Step 9. Click the **Select** button.

Step 10. The selected requisition(s) are listed in the **Specify the requisitions for which this candidate is applying section**.

Step 11. Click the **Next** button.

Step 12. Click in the **First Name** field.

Step 13. Enter the desired information into the **First Name** field. Enter "**SOT_TRN_CreateProfile**".

Step 14. Click in the **Last Name** field.

Step 15. Enter the desired information into the **Last Name** field. Enter "**SOT_TRN_LastName**".

Step 16. Click in the **Email Address (or User Name)** field.

Step 17. Enter the desired information into the **Email Address (or User Name)** field. Enter "**noemail@texas.gov**".

Step 18. Click the **Next** button.

Step 19. After entering the candidate's information, CAPPS Recruiting will check for duplicate records currently existing in the database. The duplicate search includes comparing existing telephone numbers, email addresses and names. If the candidate's information exists the user may select it and open the file. If not, the user may select **Create Candidate** or **Modify your Criteria**.

Step 20. In this lesson, let's create a candidate.

Click the **Create Candidate** button.

Step 21. Click in the **Address (line 1)** field.

Step 22. Enter the desired information into the **Address (line 1)** field. Enter "**P.O. Box 111**".

Step 23. Click in the **City** field.

Step 24. Enter the desired information into the **City** field. Enter "**Simpletown**".

Step 25. Click in the **Zip/Postal Code** field.

Step 26. Enter the desired information into the **Zip/Postal Code** field. Enter "**xxxxx**".

Step 27. Click the scrollbar.

Step 28. Click the **Primary Number** list.

Step 29. Click the **Home Phone** list item.

Step 30. Click in the **Home Phone Number** field.

Step 31. Enter the desired information into the **Home Phone Number** field. Enter "**XXX-XXX-XXXX**".

Step 32. Click the **Attachments** tab.

Step 33. Click the **Add a file** button.

Step 34. The **Add a File** page enables the user to attach documentation to the candidate profile, such as a resume or proof of certification letters.

Step 35. In this lesson, there are no attachments to be added to the candidate's file.

Step 36. Click the **Cancel the action** button.

Step 37. Click the **General Profile** tab.

Step 38. Click the **Save and Close** button.

Step 39. This message, "**Do you want to create another candidate using the same criteria?**" is displayed to help save time when creating multiple profiles.

Step 40. Click the **No** button.

Step 41. The new candidate profile under the requisition of **SOT_TRN_Program Specialist II** is complete.

The candidate profile is available in view-only mode.

Step 42. Click the **Collapse this section** link.

Step 43. Click the **Edit** button.

In **Edit** mode, all fields included in the candidate profile are open to update, as needed.

Step 44. Required fields are highlighted with a red (*) asterisk.

Step 45. Click the scrollbar.

Step 46. **Section 2. Resume** enables the user to type information from a candidate's submitted resume.

Click in the **Resume** field.

Step 47. Enter the desired information into the field. Enter "**This section may be used to type or paste the candidate's resume information.**".

Step 48. Click the scrollbar.

Step 49. **Section 3 - Submission Information** is used to indicate how the candidate's profile was submitted.

Step 50. **Section 4 - Profile Information** is used to indicate the candidate's job preferences.

Step 51. Click the scrollbar.

Step 52. Click the **Date of Availability drop down Calendar** list.

Step 53. Click the **December 28, 2015**.

Step 54. Click in the **Minimum Annual Salary** field.

Step 55. Enter the desired information into the **Minimum Annual Salary** field. Enter "**3,000**".

Step 56. Click the scrollbar.

Step 57. Click the **Job Field...Modify** button.

Step 58. The **Job Field Selector** page is used to identify which **Job Classification** the candidate has selected.

Step 59. Click the **Select** button.

Step 60. The **Job Classification** selected is displayed.

Step 61. Click the **Done** button.

Step 62. Click the **Organization...Modify** button.

Step 63. The **Organizations Selector** page is used to identify the agency at which the candidate prefers to work.

Step 64. Click the **Select** button.

Step 65. Click the **Done** button.

Step 66. The **Selected Organization** is displayed.

Step 67. Click the scrollbar.

Step 68. Click the **Location...Modify** button.

Step 69. Click in the **City** field.

Step 70. Enter the desired information into the **City** field. Enter "**Austin**".

Step 71. Click the **Refresh** button.

Step 72. The **Available Location** list displays information based on the **Quick Filter**.

Step 73. Click the **Select** button.

Step 74. The **Selected Location** is displayed.

Step 75. Click the **Done** button.

Step 76. Click the scrollbar.

Step 77. **Section 5 - Experience and Credentials** is used to list the candidate's Education, Work Experience and Certifications.

Step 78. The **Add** button is used to note the appropriate details for each area.

Step 79. Click the scrollbar.

Step 80. **Section 6 - Job Questionnaire** is used to display the questions the candidate must answer during the application process.

Step 81. Click the scrollbar.

Step 82. The **Prescreening Questionnaire** section contains job-specific questions as designated by the agency.

Step 83. Click the scrollbar.

Step 84. **Section 7 - References** are used to note the candidate's business or personal references

Step 85. Click the **Save and Close** button.

Step 86. The Candidates job-specific profile has been created.

Step 87. The candidate will receive an email with logon instructions to access their candidate file.

Step 88. This is an example of an email after a job-specific profile has been created for the candidate.

Step 89. Congratulations! You have successfully completed this lesson. **End of Procedure.**

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.

When Recruiters add questions to the requisition, they will specify if the question is required for the position or if it is an asset. This is used to help identify the ACE candidates.

Procedure

In this lesson, you will learn how to setup prescreening questions criteria and view candidates' responses.

Action

Step 1. Starting at the CAPPS Recruiting Home Page, access the requisition to view the prescreening questions.

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

Step 3. Click the **SOT_TRN_ADMINISTRATIVE ASSISTANT V** link.

Shows the requisition details for the SOT_TRN_ADMINISTRATIVE ASSISTANT V (00000223)

Step 4. Click the **Collapse the 1. Requisition Structure section** link.

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

Step 6. Click the **Edit** button.

Step 7. The **5. Questionnaire** section displays the **Disqualification** and **Requisition**-specific questions.

The **Disqualification Questions** do not disqualify a candidate. These questions may require verification of the candidate's response.

Step 8. Click the scrollbar.

Step 9. The requisition-specific **Questions** may be applied to the requisition at any time. The user may add, sort or remove questions, as applicable.

Step 10. Click the **Required/Asset** dropdown button to view the options.

Step 11. Click the **Required** list item.

Step 12. Proceed to apply the appropriate criterion for each question.

Step 13. Click the scrollbar.

Step 14. Click the **Required/Asset** dropdown button to view the options.

Step 15. Click the **Required** list item.

Step 16. Click the **Required/Asset** dropdown button to view the options.

Step 17. Click the **Asset** list item.

Step 18. Click the scrollbar.

Step 19. Click the **Required/Asset** dropdown button to view the options.

Step 20. Click the **Asset** list item.

Step 21. Click the **Required/Asset** dropdown button to view the options.

Step 22. Click the **Asset** list item.

Step 23. Click the scrollbar.

Step 24. Click the **Required/Asset** dropdown button to view the options.

Step 25. Click the **Asset** list item.

Step 26. Click the scrollbar.

Step 27. Click the **Required/Asset** dropdown button to view the options.

Step 28. Click the **Required** list item.

Step 29. Now that the **Required** and **Asset** criterion have been set for the appropriate requisition-specific questions, it's time to save and locate a candidate.

Step 30. Click the **Save and Close** button.

Step 31. Click the **Candidates** link.

Step 32. Click the **SOT_TRN_InterviewOffer, SOT** link.

Step 33. Click the **Collapse this section** link.

Step 34. Click the **Expand this section** link.

Step 35. Click the scrollbar.

Step 36. The **Job Questionnaire** on the candidate profile displays the candidate's answers to the prescreening questions. The answers are identified by a **GREEN** check mark.

Step 37. Click the scrollbar.

Step 38. Click the scrollbar.

Step 39. Click the scrollbar.

Step 40. Click the scrollbar.

Step 41. Click the scrollbar.

Step 42. Note that the **Required** and **Assets** criteria are tallied at the end of section **6 - Job Questionnaire** as well as the **Job Submission** card.

This information is used to identify the number of matched criteria.

Step 43. After you have screened this candidate for the **Required** and **Asset** criteria, it is time to move them to the next step in the Candidate Selection Workflow (CSW) process. This is completed by accessing the **Change Step/Status** action.

Step 44. Click the **More Actions** dropdown.

Step 45. Click the **Change Step/status...** option.

Step 46. The **Change Step and Status** page displays the **Current Step** and **Current Status** of the candidate's application.

Step 47. The **Information** section displays the Candidate Selection Workflow (CSW) options for the **New Step** and the **New Status**.

NOTE: Reaching a status marked with an asterisk (*) completes the step.

Step 48. Click the **New Status** dropdown.

Step 49. Click the **Passed HR Screen*** list item.

Step 50. Click the **Save and Continue** button.

Step 51. Notice the **Current Step** and **Current Status** has changed to **HR Screen** and **Passed HR Screen**, respectively.

Step 52. The **New Step** and **New Status** have automatically changed to the next phase of the CSW which is **HM Screen** and **To be Reviewed**, respectively.

Step 53. Click the **New Status** dropdown.

Step 54. Click the **Passed HM Screen*** list item.

Step 55. Notice the **Current Step** and **Current Status** have changed to **HM Screen** and **Passed HM Screen***, respectively.

Step 56. Click the **Save and Close** button.

Step 57. Congratulations! You have completed this lesson. **End of Procedure.**

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.

Action

Step 1. Click the **Candidates** link.

The selected candidate must have passed all screening before an interview may be scheduled.

Step 2. The **Status Name** must be **HR Screen - Passed HR Screen** OR **HM Screen - Passed HM Screen**.

Step 3. Click the candidate, **SOT_TRN_InterviewOffer, SOT** link.

Step 4. The **Job Submission** card also displays the **Step** as **HM Screen** and the **Status** as **Passed HM Screen**.

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

Step 6. The **More Action** drop-down menu displays the available actions when a candidate has passed the screening process.

Step 7. Click the **Change Step/status...** menu.

Step 8. The **Change Step and Status** page displays the **Current Step** of **HM Screen** and the **Current Status** as **Passed HM Screen**.

Step 9. The **Information** section will automatically list the next Candidate Selection Workflow (CSW) step and status. The **New Step** and **New Status** will be **1st Interview**.

Step 10. Click **Save and Close** button.

Step 11. Click the **More Actions** link.

Step 12. Click the **Schedule an Interview...** menu.

The **Schedule an Interview** page appears. The page is used to provide the details of the interview including scheduling the attendees.

Step 13. The **Interview Properties** include the email subject line, organizer, date, time and location.

Step 14. The **Subject** will default to include the position title and agency name.

Step 15. The **Start** and **End** date will default to the current date and time. This information may be updated as needed.

Step 16. Click the **drop down Calendar** list.

Step 17. Click the **December 10 2015**.

Step 18. Click the **Drop Down Calendar** list.

Step 19. Click the **December 10 2015**.

Step 20. Click the **End Time** list.

Step 21. Click the **12:00 PM** list item.

Step 22. Click in the **Location** field.

Step 23. Enter the desired information into the **Location** field. Enter "**Corporate Office - Room 9**".

Step 24. Click the **Next** button.

Step 25. The **Schedule an Interview - Interview Attendees** page enables the user to select and invite attendees to the candidate interview.

The **Name or email address** field enables the user to input the attendee name or email address.

Step 26. The **Selected Attendees** provides a list of the selected attendees from the list below.

Step 27. The **Interview Attendees** may be selected through the **Quick Filters** feature.

Step 28. Click the **Name** field.

Step 29. Enter the desired information into the **Name** field. Enter "**Recruiter Administrator**".

Step 30. Click the **Refresh** button.

Step 31. The **Quick Filter** list returns the matches to the **Name** entered.

Click the **Select** button.

Step 32. Notice **Recruiter, Administrator** appears in the **Selected Attendees** section.

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

Step 34. The **Schedule an Interview - Message** page enables the user to choose a **Message Template** for the Interview Notification.

Click the **Send the candidate file to the attendees (but not to the candidate)** option.

Step 35. Click the **Send the requisition file to the attendees (but not to the candidate)** option.

Step 36. To preview the Interview message prepared for the candidate and attendees.

Step 37. Click the **Preview** button.

Step 38. This is a sample message.

It contains logistical information regarding the interview. This message will be sent to both the candidate and other attendees to the interview.

Step 39. Click the **Close** button.

Step 40. Click the **Yes** button.

Step 41. Click the **Done** button.

Step 42. Here is a sample of the email that is sent to the candidate and requested attendees.

Click the **CAPPS Recruiting** email.

The email displays the interview schedule detail:

Date, **Time**, **Location** and **Attendees**.

Step 43. This email includes attachment of the **Candidate File** and the Requisition in a PDF format (the candidate will not receive these attachments.)

Step 44. Now that the candidate has been scheduled for an interview, notice the **Job Submission** card **- Status** has automatically been updated to **1st Interview Scheduled**.

Step 45. Click the **More Actions** link.

Step 46. Click the **OK** button.

Step 47. Notice the CSW **Current Status** has changed to **1st Interview Scheduled.**

Step 48. Notice the next CSW **New Status** has automatically updated to **Under Consideration**. This status will remain until the interviews have been completed.

Step 49. Click the **Save and Close** button.

Step 50. Notice the candidate **Job Submission** card displays the **Status** of **Under Consideration.**

Step 51. Click the **More Actions** link.

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

Step 53. If **More Actions** are applied to the candidate's file prior to the scheduled interview date and time, this message will be displayed.

Step 54. Click the **OK** button.

Step 55. Notice the **Current Status** is **Under Consideration**.

Step 56. Notice the next CSW **New Status** has now automatically changed to **Passed Interviews***.

There are additional options that may be applied to the candidate depending upon the results of the 1st interview.

Step 57. In this lesson, we will use the **New Status** as "**Passed Interviews***".

Step 58. After all interviews have been completed and passed, this new status can be saved on the candidate's profile using the **Save and Close** button below.

Step 59. Click the **Save and Close** button.

Step 60. Now notice the **Job Submission Status** reflects the change to **Passed Interviews**.

Step 61. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Make an Offer

Creating and Extending an Offer

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

CAPPS Recruiting users have the ability to create and extend job offers.

Procedure

In this lesson, you will learn the steps to create an offer and then extend that offer to a candidate.

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on the users security role.

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

Step 3. Click the **SOT_TRN_InterviewOffer,** link.

Step 4. To create an offer for a candidate, the candidate must be in the appropriate CSW **Step** and **Status**. Notice the **Status** for this candidate is '**Passed Interviews**' which means that CAPPS Recruiting will enable an offer to be created.

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

Step 6. Click the **Create Offer...** menu.

Step 7. 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 **Offers (New)** form.

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

Step 8. When hovering the mouse at the top of a column or beside rows or sections of the **Offer** form, the **Move** icon will appear. By clicking this icon, users can move fields of information stored on the requisition to the **Offer (New)** column all at once or individually.

Step 9. Click the **Move** icon.

Step 10. As you scroll down the page, you will notice the designated requisition information will appear on the **Offer (New)** form.

Step 11. Let's update the date information for the offer first.

Step 12. Click the **Target Start Date** dropdown arrow.

Step 13. Click the **15** list item.

Step 14. Click the **Start Date** dropdown arrow.

Step 15. Click the **15** list item.

Step 16. Click the horizontal scrollbar.

Step 17. This displays the start time of the job.

Step 18. Click the **Start Date Time** dropdown arrow.

Step 19. Click the **09** list item.

Step 20. Click the scrollbar.

Step 21. Notice how the designated information from the Requisition has been copied to the **Offer (New)** column. This is a result of using the **Move** icon at the top of the column.

Step 22. Click the scrollbar.

Step 23. Notice the **Position Number** has also been moved to the **Offer (New)** form.

Step 24. Click in the **Comments** field.

Step 25. Enter the desired information into the **Comments** field. Enter "**SOT_TRN Offer**".

Step 26. Before saving the offer, ensure that all required fields have been completed. These are the fields identified with a red (*****) asterisk.

- **Salary Admin Plan**
- **Salary Grade**
- **Position Number**
- **Comments**

Step 27. Click the **Save and Close** button.

Step 28. Notice the **Step** and **Status** have been updated to reflect the state of the Offer. The **Step** is **Offer** and the **Status** is **Draft.**

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

Step 30. Click the **Request Approval...** list item.

Step 31. The **Request Approval** page displays the **Approvers** identified on the requisition.

Step 32. An email is sent to all listed Approvers to request a response. In addition to identifying the approvers, this page may be used to approve the requisition.

Step 33. In this lesson, the Recruiter is the only approver.

Step 34. Click the **Decision** dropdown button.

Step 35. Click the **Approve** list item.

Step 36. Click in the **Comments** field.

Step 37. **Note:** In this lesson, the Recruiter is the only approver. It is recommended to add concise comments in the event of an audit.

Step 38. Enter the desired information into the **Comments** field. Enter "**Reference department email dated 12/10/15. Approved**".

Step 39. Click the **Done** button.

Step 40. Notice the CSW **Step** and **Status** have changed to **Approved**.

Step 41. Click the **More Actions** link.

Step 42. Click the **Extend Offer** menu.

Step 43. The **Extend Offer** page is used to identify the method in which to extend the offer to the candidate.

Step 44. Click the **Extend in writing** option.

Step 45. Click in the **Comments** field.

Step 46. Enter the desired information into the **Comments** field. Enter "**Extend in writing**".

Step 47. Click the **Done** button.

Step 48. The **Send Offer Letter** page is used to identify the method and message template of the Offer letter.

Step 49. Click the **Send message by** list.

Step 50. The **Send Offer Letter** provides 3 methods to extend an offer in writing:

- **Email** - offer letter sent to the recipients email address.
- **Printed Letter** - offer letter sent via the postal service.
- **E-Offer** - makes the offer letter visible online in the career section of the CAPPS Recruiting website.

Step 51. In this lesson, the offer letter will be printed.

Click the **Printed Letter** list item.

Step 52. Click the **Open the template selector** button.

Step 53. The **Template Selector** displays the list of delivered offer letter templates.

Step 54. Click the **Select** button.

Step 55. The **Send Offer Letter** page displays the options that will appear on the printed letter.

Step 56. The **From template** provides standard CAPPS Recruiting verbiage for offer letters.

Step 57. The **Select the paragraphs to include in the message** section enables the users to select what standard information should appear on the offer letter. (i.e. agency log, paragraphs specific to external or internal candidates, etc.)

Step 58. Select the appropriate checkboxes to identify your agency's letterhead and Offer Letter detail to print. Note: The **CAPPS Generic Logo** and **CAPPS Offer Letter Paragraph - External** will default as checked.

Step 59. Click the **Next** button.

Step 60. This **Send Offer Letter** page identifies the blank information on the offer letter; it is also known as "missing values".

Step 61. Based on the letter template selected, this page will display the information that requires unique information specific to the offer and/or the candidate.

Step 62. Click the **Next** button.

Step 63. This section of the **Send Offer Letter** displays the number of errors or "missing values" contained on the letter. It also displays the names of the letter.

Step 64. These errors may be fixed by completing the previous page.

Step 65. Click the **Previous** button.

NOTE: If these fields are completed here, this information will automatically populate in the letter. If not, it will need to be manually populated on the letter.

Step 66. Enter the desired information into the **Position_Work_Address** field. Enter "**Agency Location**".

Step 67. Click in the **On_Boarding_Session_Office_Name** field.

Step 68. Enter the desired information into the **On_Boarding_Session_Office_Name** field. Enter "**Agency Office**".

Step 69. Click in the **On_Boarding_Session_Start_Time** field.

Step 70. Enter the desired information into the **On_Boarding_Session_Start_Time** field. Enter "**9:00am**".

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

Step 72. Enter the desired information into the **On_Boarding_Session_Office_Address** field. Enter "**Agency Address**".

Step 73. The **Other_Required_First_Day_Documentation** field is used to list additional items that an Agency requires a candidate to bring to the first on-boarding session.

Step 74. This information may be a list of additional items. This list may be pasted inside the actual letter when using the edit mode.

Step 75. In this lesson, only one item will be required on the first day.

Step 76. Click in the **Other_Required_First_Day_Documentation** field.

Step 77. Enter the desired information into the **Other_Required_First_Day_Documentation** field. Enter "**Please bring your ID card**".

Step 78. Click the **Next** button.

Step 79. Note the **Total Errors** equal 0 (zero). This means the letter is ready to print with the entries you entered on the previous page.

Step 80. There are instances, however, where CAPPS Recruiting will identify errors that must corrected before proceeding to print.

Step 81. The next steps in this lesson will walk through that process.

Step 82. Notice in this example, the recipient letter contains (8) Total Errors. To correct or update these errors the user must access the recipient's specific letter.

Step 83. Click the **Recipient: SOT_TRN_InterviewOffer** link.

Step 84. This **Edit Message** page displays the candidate name and provides ability to edit the offer letter.

Step 85. Click the **Edit...** button.

Step 86. The Offer Letter is displayed in edit mode. The edit mode uses the basic editing tools.

Step 87. The yellow highlight areas of the letter indicate the errors noted on the **Send Offer Letter - Edit Message** page.

Step 88. The user must manually update the information in these highlighted areas before sending the letter to print.

Step 89. Click the scrollbar.

Note: It is important to view the entire letter to ensure all highlighted area have been manually changed to the agency-specific information.

Step 90. Click the scrollbar.

Step 91. After all updates have been completed, click the **Done** button.

Step 92. Click the **Save the changes** button.

Step 93. Click the **Print** button.

Step 94. The Offer Letter is now available to print.

Step 95. Click the **Print** button.

Step 96. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Creating an eOffer

Section 2, Lesson 8 Exercise - Scenario 2: Creating an eOffer

CAPPS Recruiting enables users to use the Electronic Offer (eOffer) feature to extend offers electronically to candidates. Candidates will then access the Career Section website to respond to the offer online.

Procedure

In this lesson, you will learn how to create an eOffer.

Action

Step 1. Click the **More Actions** link.

Step 2. Click the **Extend Offer** list item.

Step 3. The **Extend Offer** page is used to identify the method in which the offer will be extended to the candidate.

Step 4. Click the **Extend in writing** option.

Step 5. Click in the **Comments** field.

Step 6. Enter the desired information into the **Comments** field. Enter "**Extend e-Offer**".

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

Step 8. The **Send Offer Letter** page is used to identify the method and message template of the Offer letter.

Step 9. Click the **Send message by** list.

Step 10. Click the **E-Offer** list item.

Step 11. Click the **Open the selector** button.

Step 12. The **Template Selector** displays the list of delivered offer letter templates.

Step 13. Click the **Select** button.

Step 14. The **Send Offer Letter** page displays the options that will appear on the printed letter.

Step 15. The **From template** provides standard CAPPS Recruiting verbiage for offer letters.

Step 16. The **Select the paragraphs to include in the message** section enables the users to select what standard information should appear on the offer letter. (i.e. agency logo, paragraphs specific to external candidates or internal candidates, etc.)

Step 17. Select the appropriate checkboxes to identify your agency's letterhead and Offer Letter detail to print. Note: The **CAPPS Generic Logo** and **CAPPS Offer Letter Paragraph - External** will default as checked.

Step 18. Click the **Next** button.

Step 19. This **Send Offer Letter** page identifies the blank information on the offer letter also known as "missing values".

Step 20. Based on the letter template selected, this page will display the information that requires specific information related to the offer and/or the candidate.

Step 21. Click the **Next** button.

Step 22. This page of the **Send Offer Letter** displays the number of errors or "missing values" contained on the letter. It also displays the names of the letter recipients.

Step 23. These errors may be fixed by completing the **previous** page.

Step 24. Click the **Previous** button.

NOTE: If these fields are completed here, this information will automatically populate in the letter. If not, it will need to be manually populated on the letter.

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

Step 26. Enter the desired information into the **Position_Work_Address** field. Enter "**Agency Location**".

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

Step 28. Enter the desired information into the **On_Boarding_Session_Office_Name** field. Enter "**Agency Office**".

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

Step 30. Enter the desired information into the **On_Boarding_Session_Start_Time** field. Enter "**9:00am**".

Step 31. Click in the **On_Boarding_Session_Office_Address** field.

Step 32. Enter the desired information into the **On_Boarding_Session_Office_Address** field. Enter "**Agency Office Address**".

Step 33. This **Other_Required_First_Day_Documentation** field is used to list additional items that an Agency requires a candidate to bring to the first on-boarding session.

Step 34. This information may be a list of additional items. This list may be pasted inside the actual letter when using the edit mode.

Step 35. In this lesson, only one item will be required on the first day.

Step 36. Click in the **Other_Required_First_Day_Documentation** field.

Step 37. Enter the desired information into the **Other_Required_First_Day_Documentation** field. Enter "**Bring identification card**".

Step 38. Click the **Next** button.

Step 39. Note the **Total Errors** equal 0 (zero). This means the letter is ready to print with the entries you entered on the previous page.

Step 40. There are instances when CAPPS Recruiting will identify errors that must corrected before proceeding to print.

Step 41. The next steps in this lesson will walk through that process.

Step 42. Notice in this example, the recipient letter contains eight (8) Total Errors. To correct or update these errors, the user must access the recipient's specific letter.

Step 43. Click the **Recipient: SOT_TRN_InterviewOffer** link.

Step 44. The **Send Offer Letter - Edit Message** page enables the user to add Attachments to the e-Offer, as needed.

Step 45. Click the **Edit...** button.

Step 46. The Offer letter appears in edit mode. The page provides basic editing tools to update the letter.

Step 47. The yellow highlighted areas of the letter indicate the errors noted on the **Send Offer Letter - Edit Message** page.

Step 48. The user must manually update the information in these highlighted areas before sending the letter.

Step 49. Click the scrollbar.

Step 50. **Note:** It is important to view the entire letter to ensure all highlighted areas have been manually changed to the agency-specific information.

Step 51. Click the **Done** button.

Step 52. Click the **Save the changes** button.

Step 53. Click the **Send** button.

Step 54. Notice the **Step** is **Offer** and the **Status** is **Extended**.

Step 55. Next, let's take a look at the e-Offer email that was sent to the recipient.

Double-click the **CAPPS Recruiting email** link.

Step 56. Click the **review the details of this job offer** link.

Step 57. The CAPPS Recruiting Career Section sign-in page appears for the user to login to view and respond to the e-Offer.

Step 58. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Stage a Hire Candidate

Staging a Candidate for Hire

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

The recruiter progresses a candidate through the Candidate Selection Workflow (CSW) to the status of "To Be Hired". This status triggers the New Hire Extract 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 Status Workflow (CSW).

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on the user's security role.

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

Step 3. Click the **SOT_TRN_InterviewOffer** link.

Step 4. Notice the **Status** is **Extended**.

Step 5. The next step will be to record the candidate's response.

Click the **More Actions** link.

Step 6. Click the **Capture Response...** list item.

Step 7. The **Capture Offer Response** page displays the candidate's response to the offer, the date of the response and the candidate's start date.

Step 8. Click the **The candidate accepted the offer** option.

Step 9. **Note:** This option may default as checked.

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

Step 11. The **Capture Offer Response - Accepted on (Event Date)** field defaults to the current date. It may be changed as needed.

Step 12. Next, set the actual **Start Date** of the candidate.

Click the **Start Date - Month** button.

Step 13. Click the **01** list item.

Step 14. Click the **Start Date - Day** button.

Step 15. Click the **19** list item.

Step 16. Click the **Start Date - Year** button.

Step 17. Click the **2016** list item.

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

Step 19. Enter the desired information into the **Comments** field. Enter "**Candidate accepted the offer**".

Step 20. Click the **Done** button.

Step 21. Notice the Job Submission **Step** is **Offer** and the **Status** has changed to **Accepted**.

Step 22. Click the **More Actions** link.

Step 23. Click the **Change Step/status...** menu.

Step 24. The **Change Step and Status** - Current Step and Status in now **Offer** and **Accepted**.

Step 25. The **Information** section enables you to update the **New Step** and **Status** based on your agency's process.

Step 26. In this lesson, the Step and Status will be changed to the appropriate Hire option.

Click the **New Step** dropdown button

Step 27. Click the **Hire** list item.

Step 28. When the **New Step** changes to "**Hire**", the **New Status** automatically defaults to "**To be Hired**".

Step 29. Click the **Save and Close** button.

Step 30. Notice the Job Submission - **Step** and **Status** has changed to **Hire** and **To be Hired**.

Step 31. This is the Step and Status that is required for the New Hire Extract (*interface*) to identify the candidate file information to move to the CAPPS HR/Payroll system.

Step 32. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Section 3 - Self-Service

Recruiting Self-Service

Viewing/Updating/Hiring a Candidate

Section 3 - Lesson 1, Exercise 1: Viewing/Updating and Hiring 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 Extract interface file.

Procedure

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

Action

Step 1. Click the **Recruiting Self-Service** button.

The **Recruiting Center** menu displays the **Hire Candidate** and **View/Update Candidate** links to manage onboarding a candidate.

Step 2. Click the **View/Update Candidate** link.

The **View/Update Candidate** page displays the candidate information from the **New Hire Extract.**

Step 3. The **New Hire Extract** 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.

The **New Hire Extract** is run three times during the day and once overnight.

Step 4. This note applies to the Candidate Disposition Status. It provides instructions on what happens when the ***Candidate Disposition Status** is updated.

Step 5. After the **New Hire Extract** stages the data in CAPPS HR/Payroll ***(depending on security access),*** certain individuals will be able to review the data on this page.

Step 6. The **View/Update Candidate** page is used to view/update selected candidates by agency for onboarding.

Step 7. Click the scroll bar.

Step 8. Click the scroll bar.

Step 9. 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.

Note: Only update this field if corrections are required to the Candidate record in Recruiting or if the Candidate was hired in to CAPPS using the Custom Hire page.

Step 10. The ***Candidate Disposition Status** field is also used to list errors reported by the **New Hire Extract**.

Click the **Candidate Disposition Status** list.

Step 11. The ***Candidate Disposition Status** has three options:

1. **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.

2. **Invalid:** This system-generated status means this candidate did not pass the edits setup in the **New Hire Extract** 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 candidates status(es) and making the necessary corrections. The candidate file will be reprocessed through the New Hire Extract 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.

2. **Valid**: Valid means that the data passed the edits set up in the New Hire Extract 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 12. Click the **Valid** list item.

Step 13. Click the scroll bar.

Step 14. Click the **Save** button.

Step 15. The next step to preparing a candidate for hire is to review the candidate's Personal, Job and Payroll data.

Step 16. This will be accessed through the **Hire Candidate** page.

Step 17. Let's navigate to the **Hire Candidate** page.

Step 18. Click the **Recruiting Center** button.

Step 19. Click the **Hire Candidate** menu.

Step 20. The **Hire Candidate** page lists candidates who are pending the onboarding transaction. The data comes from both CAPPS Recruiting and CAPPS HR/Payroll.

Step 21. 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 22. **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 23. Click the scroll bar.

Step 24. Click the scroll bar.

Step 25. Click the **UATLast2, UATFirst2** link.

Step 26. After selecting a Candidate, their **Personal Data**, **Job Data** and **Payroll Data** pages appear.

Step 27. 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 28. 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 29. Notice the **Empl ID** is set to **NEW**. An employee ID will be assigned after the candidate information has been verified and the record has been successfully saved.

Step 30. The **Ethnic Group** is one of the required fields on the **Personal Data** page.

Step 31. Click the **Ethnic Group** list item.

Step 32. Click the **American Indian/Alaska Native** list item.

Step 33. Click the scroll bar.

Step 34. The **Personal Data** tab also shows the **Info Release Indicators.**

Step 35. The **Info Release Indicators** field **must** be updated for the selected candidate.

Step 36. 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 37. In this lesson, the **Commissioned Peace Officer** box will not be checked, so the remaining information can be updated.

Step 38. Click the **Home Address Release** list.

Step 39. Click the **Y** list item.

Step 40. Click the **SSN release** list.

Step 41. Click the **N** list item.

Step 42. Click the **Emergency Contact Info Rel** list.

Step 43. Click the **Y** list item.

Step 44. Click the **Home Telephone Release** list.

Step 45. Click the **N** list item.

Step 46. Click the **Family Info Release** list.

Step 47. Click the **N** list item.

Step 48. After the **Info Release Indicators** has been updated, proceed to verify the **Job Data**.

Step 49. Click the **Job Data** link.

Step 50. The **Job Data** tab displays the candidate's **Organizational Information** and **Job Information**.

Step 51. This information can only be verified and not updated on this page. It defaults from the **Position Number** entered in the **Recruiting** module.

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

Step 52. 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 53. The Candidate record must be updated in the Recruiting module and reprocessed through the **New Hire Extract** interface. This is required to maintain consistency between the Recruiting and CAPPS HR/Payroll system.

Step 54. Click the **Payroll Data** tab.

Step 55. The **Payroll Data** page displays the **Payroll** and **Compensation** related information for the new employee.

Step 56. Click the **SAVE** button.

Step 57. Notice the **Empl ID** has been assigned to the new employee.

Step 58. 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 59. Click the **Select Candidate** link.

Step 60. The **Hire Candidate** page appears to enable the user to select another candidate for onboarding.

Step 61. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Recruiting Manager Self-Service

Hiring a Candidate through MSS

Section 3, Lesson 2 - Exercise 1: Hire a Candidate through Manager Self-Service (MSS)

This lesson walks through the steps in Manager Self-Service Recruiting 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.

Action

Step 1. Click the **Manager Self-Service** button.

Step 2. The **Manager Self-Service** menu displays the various options available to a manager who has direct reports.

Step 3. The focus of this lesson will be **Hire Candidate**.

This action is only available for agencies with **MSS Full**.

Step 4. Click the **Hire Candidate** link.

Step 5. The **As of Date** defaults to the current date. It can be changed as needed.

Step 6. This date field is used to display candidates with a **Start Date** within 30 days of the **As Of Date**.

Step 7. **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 8. The **Hire Candidate** page displays the recruiting information for the **Valid** candidates to begin the onboarding process.

Step 9. This list of applicants is a result of the **New Hire Extract** process. The **New Hire Extract** pulls any candidate who has been updated to the **Step/Hire** and **Status/To Be Hired** in the **Agency Recruiting** module.

Step 10. The New Hire Extract sends both the **Personal Data** and **Job Data** to the **Hire Candidate** page in CAPPS HR/Payroll.

Step 11. The **New Hire Extract** is run three times during the day and once overnight.

Step 12. 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**. The field may be updated to locate candidates with a specific **Start Date**.

Step 13. The **Hire Candidate** page lists the applicants reporting to the designated manager.

Step 14. Click the **STUVLast, STUVFirst** link.

Step 15. After selecting a candidate, the **Personal Data page** appears. The tabs to access the **Job Data** and **Payroll Data** pages also display.

Step 16. After the candidate has been selected for hire, the manager must verify and validate the personal information, job and compensation-related data.

Step 17. The **Personal Data** tab displays the candidate's **Personal Data**, **National ID** and **Info Release Indicators**.

Step 18. Notice the **Empl ID** is set to **NEW**. An employee ID will be assigned after the candidate's information has been verified and the record has been successfully saved.

Step 19. Click the scroll bar.

Step 20. The **Info Release Indicators** must be completed.

Step 21. Click the **Y** list item.

Step 22. Click the **Emergency Contact Info Rel** list.

Step 23. Click the **Y** list item.

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 Information** and **Job Information**.

Step 27. This information defaults from the **Position Number** entered in CAPPS Recruiting.

Note: The **Position Number** details default from the CAPPS HR/PY system.

Step 28. Verify the **Effective Date** is correct.

Step 29. The remaining information is display only. 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 30. Click the **Payroll Data** tab.

Step 31. The **Payroll Data** page displays the **Payroll** and **Compensation-**related information for the new employee. This page is also used to save the verified candidate information.

Step 32. 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 33. Click the **SAVE** button.

Step 34. The system will display any error messages that prevented the Hire to be successful – Click the link beside each error message to go to one of the three tabs to review / fix the data, or have the data corrected in CAPPS Recruiting, as needed.

Step 35. Click the **H_SSN_RELEASE** button.

Step 36. Click the scroll bar.

Step 37. All of the fields noted under: "**Allow the following to be released to the public:** " must be completed.

Step 38. Click the **SSN release** list.

Step 39. Click the **Y** list item.

Step 40. Click the **Family Info Release** list.

Step 41. Click the **N** list item.

Step 42. Click the **Home Telephone Release** list.

Step 43. Click the **N** list item.

Step 44. After the errored information has been updated, navigate to the **Payroll Data** to save the record to hire.

Step 45. Click the **Payroll Data** link.

Step 46. Click the **SAVE** button.

Step 47. Notice the employee has been assigned an **Empl ID**.

Step 48. 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 49. Click the **Select Candidate** link.

Step 50. The **Hire Candidate** page appears to enable the user to select another candidate for onboarding.

Step 51. Congratulations! You have successfully completed this lesson.

Step 52. **End of Procedure.**

Completing the Hiring 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.

Action

Step 1.	Click the **Candidates Access** link.
Step 2.	Click the **Candidate** link.
Step 3.	The Candidate's application information will display.
Step 4.	Notice the Candidate's **Step** and **Status** is set at **Hire** and **To be Hired**. This is the information that will be updated to complete the hire process for this candidate.
Step 5.	Click the button to the right of the **More Actions** field.
Step 6.	Click the **Change Step/status...** menu.
Step 7.	The **Change Step and Status** page appears to display the available update options.
Step 8.	Click the **New Status.**
	Note: Reaching a status marked with an asterisk (*) completes the step list.
Step 9.	Click the **Hired - External*** item.
Step 10.	Click the **Save and Close** button.
Step 11.	After **Save and Close,** the system will display this warning message regarding the status of the Requisition.
Step 12.	Click the **Yes** button.

Step 13. Notice the Candidates **Step** and **Status** has now been updated to **Hire** and **Hired - External**. This status indicates the Requisition is no longer active.

Step 14. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Section 4 - Practice the Recruitment Process Checklist

Screening for Candidates Know-It

Section 3, Lesson 1 Exercise - Scenario 1: Prescreening Candidates - Practice Exercise

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.

When Recruiters add questions to the requisition, they will specify if the question is required for the position or if it is an asset. This is used to help identify the ACE candidates.

Procedure

In this lesson, you will practice the steps of viewing prescreening questions and setting question criteria. You will also practice the steps of viewing candidates' responses.

Action

Step 1. Starting at the CAPPS Recruiting Home Page access the requisition to view the prescreening questions.

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

Step 3. **Use the following information to complete this lesson:**

Start navigation: Requisition (Top)

Requisition Title: SOT_TRN Administrative V (00000223)

Requisition Action:

Step 4. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**

iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 5. **"More Action":** Change/Step Status...

Step 6. Click the **SOT_TRN_ADMINISTRATIVE ASSISTANT V** link.

Step 7. **Use the following information to complete this lesson:**

Start navigation: Requisition (Top)

Requisition Title: SOT_TRN Administrative V (00000223)

Requisition Action:

Step 8. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 9. **"More Action":** Change/Step Status...

Step 10. Click the **Collapse the 1. Requisition Structure section** link.

Step 11. Click the **Expand the 5. Questionnaire section** link.

Step 12. Click the **Edit** button.

Step 13. **Use the following information to complete this lesson:**

Requisition Title: SOT_TRN Administrative V (00000223)

Requisition Action:

Step 14. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**

iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 15. **"More Action":** Change/Step Status...

Step 16. The **5. Questionnaire** section displays the **Disqualification** and **Requisition**-specific questions.

The **Disqualification Questions** do not disqualify a candidate. These questions require verification of the candidate's response.

Step 17. Click the scrollbar.

Step 18. Click the scrollbar.

Step 19. The requisition-specific **Questions** may be applied to the requisition at any time. The user may add, sort or remove questions, as applicable.

Step 20. Click the **Required/Asset** dropdown button to view the options.

Step 21. Click the **Required/Asset** dropdown button for "**Question 1"** and "**Answer - Yes**" to view the options.

Step 22. Click the **Required** list item.

Step 23. **Use the following information to complete this lesson:**

Requisition Action:

Step 24. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 25. **"More Action":** Change/Step Status...

Step 26. Proceed to apply the appropriate criterion for each question.

Step 27. Click the scrollbar.

Step 28. Click the scrollbar.

Step 29. Click the list.

Step 30. Click the **Required/Asset** dropdown button to view the options.

Step 31. Click the **Required/Asset** dropdown button for "**Question 3"** and **"Answer - Good**" to view the options.

Step 32. Click the **Required** list item.

Step 33. **Use the following information to complete this lesson:**

Step 34. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 35. **"More Action":** Change/Step Status...

Step 36. Click the **Required/Asset** dropdown button for "**Question 4**" and "**Answer - Yes**" to view the options.

Step 37. Click the **Required/Asset** dropdown button to view the options.

Step 38. **Use the following information to complete this lesson:**

Step 39. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 40. **"More Action":** Change/Step Status...

Step 41. Click the scrollbar.

Step 42. Click the scrollbar.

Step 43. Click the **Required/Asset** dropdown button for "**Question 6**" and "**Answer - Yes**" to view the options.

Step 44. Click the **Required/Asset** dropdown button to view the options.

Step 45. **Use the following information to complete this lesson:**

Step 46. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 47. **"More Action":** Change/Step Status...

Step 48. Click the dropdown button for "**Question 7**" and "**Answer - Yes**" to view the options.

Step 49. Click the **Required/Asset** dropdown button to view the options.

Step 50. Click the **Asset** list item.

Step 51. **Use the following information to complete this lesson:**

Step 52. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 53. **"More Action":** Change/Step Status...

Step 54. Click the scrollbar.

Step 55. Click the scrollbar.

Step 56. Click the **Required/Asset** dropdown button for "**Question 10**" - **California** to view the options.

Step 57. Click the **Required/Asset** dropdown button to view the options.

Step 58. **Use the following information to complete this lesson:**

Step 59. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 60. **"More Action":** Change/Step Status...

Step 61. Click the scrollbar.

Step 62. Click the scrollbar.

Step 63. Click the **Required/Asset** dropdown button for "**Texas**" to view the options.

Step 64. Click the **Required/Asset** dropdown button to view the options.

Step 65. **Use the following information to complete this lesson:**

Step 66. **Question Thresholds:**

i. Do you speak a language other than English? (Yes) **Required**
ii. How fluently? (Good) **Required**
iii. Do you write in a language other than English? (Yes) **Asset**
iv. Are you certified interpreter? (Yes) **Asset**
v. Sign Language: (Yes) **Asset**
vi. Current Driver's License State: (California) **Asset**
vii. Current Driver's License State: (Texas) **Required**

Step 67. **"More Action":** Change/Step Status...

Step 68. Now that the Required and Asset criterion has been set for the appropriate requisitions-specific questions, **Save** and **Close** the requisition.

Step 69. Now that the **Required** and **Asset** criterion has been set for the appropriate requisition-specific questions, save and locate a candidate.

Step 70. Click the **Candidates** link.

Step 71. Now view a candidate's file to view how the candidate's responses match up to the job requirements.

Step 72. Click the **Candidates** link

Step 73. Select candidate **SOT_TRN_InterviewOffer**.

Step 74. Click the scrollbar.

Step 75. Click the scrollbar.

Step 76. Click the **More Actions** dropdown.

Step 77. **Use the following information to complete this lesson:**

Step 78. **"More Action":** Change/Step Status...

Step 79. New Step: HR Screen

Step 80. **Change New Status to**: Passed HR Screen*

Step 81. **Save and Continue**

Step 82. **New Step**: HM Screen

Step 83. **Change New Status to:** Passed HM Screen*

Step 84. **Save and Close**

Step 85. Click the **Change Step/status...** option.

Step 86. **Use the following information to complete this lesson:**

Step 87. **"More Action":** Change/Step Status...

Step 88. New Step: HR Screen

Step 89. **Change New Status to**: Passed HR Screen*

Step 90. **Save and Continue**

Step 91. **New Step**: HM Screen

Step 92. **Change New Status to:** Passed HM Screen*

Step 93. **Save and Close**

Step 94. The **Change Step and Status** page displays the **Current Step** and **Current Status** of the candidate's application.

Step 95. The **Information** section displays the Candidate Selection Workflow (CSW) options for the **New Step** and the **New Status**.

Step 96. **NOTE:** Reaching a status marked with an asterisk (*) completes the step.

Step 97. Click the **New Status** dropdown.

Step 98. **Use the following information to complete this lesson:**

Step 99. Change **New Status** to: **Passed HR Screen***

Step 100. New Step: HR Screen

Step 101. **Save and Continue**

Step 102. Change **New Status** to: **Passed HM Screen***

Step 103. New Step: HM Screen

Step 104. **Save and Close**

Step 105. **Use the following information to complete this lesson:**

Step 106. Change **New Status** to: **Passed HR Screen***

Step 107. New Step: HR Screen

Step 108. **Save and Continue**

Step 109. Change **New Status** to: **Passed HM Screen***

Step 110. New Step: HM Screen

Step 111. **Save and Close**

Step 112. Click the **Save and Continue** button.

Step 113. **Use the following information to complete this lesson:**

Step 114. Change **New Status** to: **Passed HR Screen***

Step 115. New Step: HR Screen

Step 116. **Save and Continue**

Step 117. Change **New Status** to: **Passed HM Screen***

Step 118. New Step: HM Screen

Step 119. **Save and Close**

Step 120. Notice the **Current Step** and **Current Status** has changed to **HR Screen** and **Passed HR Screen**, respectively.

Step 121. The **New Step** and **New Status** has automatically changed to the next phase of the CSW which is **HM Screen** and **To be Reviewed**, respectively.

Step 122. Click the **New Status** dropdown.

Step 123. **Use the following information to complete this lesson:**

Step 124. Change **New Status** to: **Passed HR Screen***

Step 125. New Step: HR Screen

Step 126. **Save and Continue**

Step 127. Change **New Status** to: **Passed HM Screen***

Step 128. New Step: HM Screen

Step 129. **Save and Close**

Step 130. **Use the following information to complete this lesson:**

Step 131. Change **New Status** to: **Passed HR Screen***

Step 132. New Step: HR Screen

Step 133. **Save and Continue**

Step 134. Change **New Status** to: **Passed HM Screen***

Step 135. New Step: HM Screen

Step 136. **Save and Close**

Step 137. Notice the **Current Step** and **Current Status** has changed to **HM Screen** and **Passed HM Screen***, respectively.

Step 138. Click the **Save and Close** button.

Step 139. **Use the following information to complete this lesson:**

Step 140. **New Step**: HM Screen

Step 141. **New Status:** Passed HM Screen*

Step 142. **Save and Close** to Save the status change.

Step 143. Congratulations! You have completed this lesson. **End of Procedure.**

Interviewing Candidates Know-It

Section 3, Lesson 2 Exercise, Scenario 1: Interviewing Candidates - Practice Exercise

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.

Procedure

In this lesson, you will practice the steps of viewing and setting up an interview for a candidate.

Action

Step 1. Click the **Candidates** link.

Step 2. The selected candidate must have passed all screening before an interview may be scheduled.

The **Status Name** must be **HR Screen - Passed HR Screen** OR **HM Screen - Passed HM Screen**.

Step 3. Click the **Candidate SOT_TRN_InterviewOffer, SOT** link.

Step 4. The **Job Submission** card also displays the **Step** as **HM Screen** and the **Status** as **Passed HM Screen**.

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

Step 6. The **More Action** dropdown menu displays the available actions when a candidate has passed the screening process.

Step 7. Click the **Change Step/status...** menu.

Step 8. The **Change Step and Status** page displays the **Current Step** of **HM Screen** and the **Current Status** as **Passed HM Screen**.

Step 9. The **Information** section will automatically list the next Candidate Selection Workflow (CSW) step and status. The **New Step** and **New Status** will be **1st Interview**.

Step 10. Click **Save and Close** button.

Step 11. Click the **More Actions** link.

Step 12. Click the **Schedule an Interview...** menu.

Step 13. The **Schedule an Interview** page appears. The page is used to provide the details of the interview including scheduling the attendees.

Step 14. The **Interview Properties** include the email subject line, organizer, date, time and location.

Step 15. The **Subject** will default to include the position title and agency name.

Step 16. The **Start** and **End** date will default to the current date and time. This information may be updated as needed.

Step 17. Click the **Drop Down Calendar** list.

Step 18. Click the **December 10 2015**.

Step 19. Click the **Drop Down Calendar** list.

Step 20. Click the **December 10 2015**.

Step 21. Click the **End Time** list.

Step 22. Click the **12:00 PM** list item.

Step 23. Click in the **Location** field.

Step 24. Enter the desired information into the **Location** field. Enter "**Corporate Office - Room 9**".

Step 25. Click the **Next** button.

Step 26. The **Schedule an Interview - Interview Attendees** page enables the user to select and request attendees to the candidate interview.

Step 27. The **Name or email address** field enables the user to input attendee names or email addresses.

Step 28. The **Selected Attendees** provides a list of the selected attendees from the list below.

Step 29. The **Interview Attendees** may be selected through the **Quick Filters** feature.

Step 30. Click the **Name** field.

Step 31. Click the **Name** field.

Step 32. Enter the desired information into the **Name** field. Enter "**Recruiter Administrator**".

Step 33. Click the **Refresh** button.

Step 34. Click the **Refresh** button.

Step 35. The **Quick Filter** list returns the matches to the **Name** entered.

Step 36. Click the **Select** button.

Step 37. Notice the **Recruiter, Administrator** appears in the **Selected Attendees** section.

Step 38. Click the **Next** button.

Step 39. The **Schedule an Interview - Message** page enables the user to choose a **Message Template** for the Interview Notification.

Step 40. Click the **Send the candidate file to the attendees (but not to the candidate)** option.

Step 41. Click the **Send the requisition file to the attendees (but not to the candidate)** option.

Step 42. To preview the Interview message prepared for the candidate and attendees.

Step 43. Click the **Preview** button.

This is a sample message.

It contains logistical information regarding the interview. This message would be sent to both the candidate and other attendees to the interview.

Step 44. Click the **Close** button.

Step 45. Click the **Yes** button.Click the **Yes** button.

Step 46. Click the **Done** button.

Step 47. Here is a sample of the email that is sent to the candidate and requested attendees. **End of Procedure.**

Creating an Offer Know-It

Section 3, Lesson 3 Exercise - Scenario 1: Creating and Extending an Offer - Practice Exercise

CAPPS Recruiting users have the ability to create and extend job offers.

Procedure

In this lesson, you will practice the steps of creating and extending an offer.

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on user security role.

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

Step 3. Click the **SOT_TRN_InterviewOffer,** link.

Step 4. To create an offer for a candidate, the candidate must be in the appropriate CSW **Step** and **Status**. Notice the **Status** for this candidate is '**Passed Interviews**' which means that CAPPS Recruiting will enable an offer to be created.

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

Step 6. Click the **Create Offer...** menu.

Step 7. 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 **Offers (New)** form.

Step 8. The **Offer** form is where all the information is gathered to create an offer. It is available to update as needed.

Step 9. When hovering the mouse at the top of a column or beside rows or sections of the **Offer** form, the **Move** icon will appear. By clicking this icon, users can move fields of information stored on the requisition to the **Offer (New)** column all at once or individually.

Step 10. Click the **Move** icon.

Step 11. As you scroll down the page, notice the designated requisition information appears on the **Offer (New)** form.

You will update the date information for the offer first.

Step 12. Click the **Target Start Date** dropdown button to activate the menu.

Step 13. Click the **Target Start Date** dropdown arrow.

Step 14. Click the **15** list item.

Step 15. Click the **Start Date** dropdown arrow.

Step 16. Click the **15** list item.

Step 17. Click the horizontal scrollbar.

Step 18. This displays a start time.

Click the **Start Date Time** dropdown arrow.

Step 19. Click the **09** list item.

Step 20. Click the scrollbar.

Step 21. Click the scrollbar.

Step 22. Notice how the designated information from the Requisition has been copied to the **Offer (New)** column. This is a result of using the **Move** icon at the top of the column.

Step 23. Click the scrollbar.

Step 24. Click the scrollbar.

Step 25. Notice the **Position Number** has also been moved to the **Offer (New)** form.

Step 26. Click in the **Comments** field.

Step 27. Enter the desired information into the **Comments** field. Enter "**SOT_TRN Offer**".

Step 28. Before saving the offer, ensure all required fields have been completed. These fields are identified with a red (*****) asterisk.

- **Salary Admin Plan**
- **Salary Grade**
- **Position Number**
- **Comments**

Step 29. Click the **Save and Close** button.

Step 30. Notice **Step** and **Status** have been updated to reflect the state of the Offer. The **Step** is **Offer** and the **Status** is **Draft.**

Step 31. Click the **More Actions** link.

Step 32. Click the **Request Approval...** list item.

Step 33. The **Request Approval** page displays the **Approvers** identified on the requisition.

Step 34. An email is sent to all listed Approvers to request a response. In addition to identifying the approvers, this page may be used to approve the requisition.

Step 35. Click in the **Comments** field.

Step 36. Click in the **Comments** field.

Step 37. **Note:** In this lesson, the Recruiter is the only approver. It is recommended to add concise comments in the event of an audit.

Step 38. Enter the desired information into the **Comments** field. Enter "**Reference department email dated 12/10/15. Approved**".

Step 39. Click the **Done** button.

Step 40. Notice the CSW **Step** and **Status** have changed to **Approved**.

Step 41. Click the **More Actions** link.

Step 42. Click the **Extend Offer** menu.

Step 43. The **Extend Offer** page is used to identify the method to be used in extending an offer to the candidate.

Step 44. Click the **Extend in writing** option.

Step 45. Click in the **Comments** field.

Step 46. Enter the desired information into the **Comments** field. Enter "**Extend in writing**".

Step 47. Click the **Done** button.

Step 48. The **Send Offer Letter** page is used to identify the method and message template for the Offer letter.

Step 49. Click the **Send message by** list.

Step 50. The **Send Offer Letter** provides three methods to extend an offer in writing:

- **Email** - offer letter sent to the recipients email address.
- **Printed Letter** - offer letter sent via the postal service.

- **E-Offer** - makes the offer letter visible online in the career section of the CAPPS Recruiting website.

Step 51. In this lesson, the offer letter will be printed.

Click the **Printed Letter** list item.

Step 52. Click the **Open the template selector** button.

Step 53. The **Template Selector** displays the list of delivered offer letter templates.

Step 54. Click the **Select** button.

Step 55. The **Send Offer Letter** page displays the options that will appear on the printed letter.

Step 56. The **From template** provides standard CAPPS Recruiting verbiage for offer letters.

Step 57. The **Select the paragraphs to include in the message** section enables users to select what standard information will appear on the offer letter. (i.e. agency log, paragraphs specific to external candidates or internal candidates, etc.)

Step 58. Select the appropriate checkboxes to identify your agency's letter-head and Offer Letter detail to print. Note: The **CAPPS Generic Logo** and **CAPPS Offer Letter Paragraph - External** will default as checked.

Step 59. Click the **Next** button.

Step 60. This **Send Offer Letter** page identifies the blank information on the offer letter (also known as "missing values").

Step 61. Based on the letter template selected, this page displays the information that requires unique information specific to the offer and/or the candidate.

Step 62. Click the **Next** button.

Step 63. This page of the **Send Offer Letter** displays the number of errors or "missing values" contained on the letter. It also displays the names of the recipients of the letter.

Step 64. These errors may be fixed by completing the previous page.

Step 65. Click the **Previous** button.

Step 66. **NOTE:** If these fields are completed here, this information will automatically populate in the letter. If not, it will need to be manually populated on the letter.

Step 67. Enter the desired information into the **Position_Work_Address** field. Enter "**Agency Location**".

Step 68. Click in the **On_Boarding_Session_Office_Name** field.

Step 69. Enter the desired information into the **On_Boarding_Session_Office_Name** field. Enter "**Agency Office**".

Step 70. Click in the **On_Boarding_Session_Start_Time** field.

Step 71. Enter the desired information into the **On_Boarding_Session_Start_Time** field. Enter "**9:00am**".

Step 72. Click in the **On_Boarding_Session_Office_Address** field.

Step 73. Enter the desired information into the **On_Boarding_Session_Office_Address** field. Enter "**Agency Address**".

Step 74. This **Other_Required_First_Day_Documentation** field is used to list additional items that an Agency requires a candidate to bring to the first on-boarding session.

Step 75. This information may be a list of additional items. This list may be pasted inside the actual letter when using the edit mode.

Step 76. In this lesson, only one item will be required on the first day.

Click in the **Other_Required_First_Day_Documentation** field.

Step 77. Enter the desired information into the **Other_Required_First_Day_Documentation** field. Enter "**Please bring your ID card**".

Step 78. Click the **Next** button.

Step 79. Note the **Total Errors** equal 0 (zero). This means the letter is ready to print with the entries you entered on the previous page.

Step 80. There are instances, however, where CAPPS Recruiting will identify errors that must corrected before proceeding to print.

Step 81. The next steps in this lesson will walk through that process.

Step 82. Notice in this example, the recipient letter contains eight (8) Total Errors. To correct or update these errors the user must access the recipient's specific letter.

Step 83. Click the **Recipient: SOT_TRN_InterviewOffer** link.

Step 84. This **Edit Message** page displays the candidate name and provides ability to edit the offer letter.

Step 85. Click the **Edit...** button.

Step 86. The Offer Letter is displayed in edit mode. The Edit mode uses the basic editing tools.

Step 87. The yellow highlighted areas of the letter indicate the errors noted on the **Send Offer Letter - Edit Message** page.

Step 88. The user must manually update the information in these highlighted areas before sending the letter to print.

Step 89. Click the scrollbar.

Step 90. View the letter to identify the fields that require agency-specific information (highlighted in yellow).

Note: It is important to view the entire letter to ensure all highlighted area have been manually changed to agency-specific information.

Step 91. Click the scrollbar.

Step 92. Click the **Done** button.

Step 93. After all updates have been completed, click the **Save the changes** button.

Step 94. Click the **Print** button.

The Offer Letter is now ready to print.

Step 95. Click the **Print** button.

Step 96. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Staging a Candidate for Hire Know-It

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

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

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

Procedure

In this lesson, you will practice the steps of setting a candidate Step and Status to "To Be Hired".

Action

Step 1. **Note**: This CAPPS Recruiting homepage is for training purposes only. Not all menu items shown will be seen in an Agency environment.

Menu items seen on the CAPPS Recruiting homepage will vary based on the users security role.

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

Step 3. **Use this information to complete this lesson:**

Start menu: Candidates

Requisition: 00000223 - SOT_TRN_ADMINISTRATIVE ASSISTANT V

Candidate Name: SOT_TRN_InterviewOffer

Step 4. "**More Actions**": Capture Response...

Step 5. Click the **SOT_TRN_InterviewOffer** link.

Step 6. **Use this information to complete this lesson:**

Start menu: Candidates

Requisition: 00000223 - SOT_TRN_ADMINISTRATIVE ASSISTANT V

Candidate Name: SOT_TRN_InterviewOffer

Step 7. "**More Actions**": Capture Response...

Notice the **Status** is **Extended**.

Step 8. The next step will be to record the response of the candidate.

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

Step 10. **Use this information to complete this lesson:**

Start menu: Candidates

Requisition: 00000223 - SOT_TRN_ADMINISTRATIVE ASSISTANT V

Candidate Name: SOT_TRN_InterviewOffer

Step 11. "**More Actions**": Capture Response...

Step 12. Click the **Capture Response...** list item.

Step 13. **Use this information to complete this lesson:**

Start menu: Candidates

Requisition: 00000223 - SOT_TRN_ADMINISTRATIVE ASSISTANT V

Candidate Name: SOT_TRN_InterviewOffer

Step 14. "**More Actions**": Capture Response...

Step 15. The **Capture Offer Response** pages displays the candidate's response to the offer, the date of the response and the candidate's start date.

Step 16. Click the **The candidate accepted the offer** option.

Step 17. **Use this information to complete this lesson:**

Start menu: Candidates

Requisition: 00000223 - SOT_TRN_ADMINISTRATIVE ASSISTANT V

Candidate Name: SOT_TRN_InterviewOffer

Step 18. "**More Actions**": Capture Response...

Step 19. **Capture Offer Response:** The candidate accepted the offer.

Note: This option may default as checked.

Step 20. Click the **Next** button.

Step 21. **Use this information to complete this lesson:**

Start menu: Candidates

Requisition: 00000223 - SOT_TRN_ADMINISTRATIVE ASSISTANT V

Candidate Name: SOT_TRN_InterviewOffer

Step 22. "**More Actions**": Capture Response...

Step 23. **Capture Offer Response:** The candidate accepted the offer.

Step 24. The **Capture Offer Response - Accepted on (Event Date)** field will default to the current date. It may be changed as needed.

Step 25. Next, set the actual **Start Date** of the candidate.

Step 26. Click the **Start Date - Month** button.

Step 27. **Use this information to complete this lesson:**

Step 28. **More Actions**: Capture Response...

Step 29. **Capture Offer Response:** The candidate accepted the offer.

Step 30. **Start Date**: 01/19/2016

Step 31. Click the **01** list item.

Step 32. **Use this information to complete this lesson:**

Step 33. **More Actions**: Capture Response...

Step 34. **Capture Offer Response:** The candidate accepted the offer

Step 35. **Start Date**: 01/19/2016

Step 36. Click the **Start Date - Day** button.

Step 37. **Use this information to complete this lesson:**

Step 38. **More Actions**: Capture Response...

Step 39. **Capture Offer Response:** The candidate accepted the offer

Step 40. **Start Date**: 01/19/2016

Step 41. Click the **19** list item.

Step 42. **Use this information to complete this lesson:**

Step 43. **More Actions**: Capture Response...

Step 44. **Capture Offer Response:** The candidate accepted the offer

Step 45. **Start Date**: 01/19/2016

Step 46. Click the **Start Date - Year** button.

Step 47. **Use this information to complete this lesson:**

Step 48. **More Actions**: Capture Response...

Step 49. **Capture Offer Response:** The candidate accepted the offer

Step 50. **Start Date**: 01/19/2016

Step 51. Click the **2016** list item.

Step 52. **Use this information to complete this lesson:**

Step 53. **More Actions**: Capture Response...

Step 54. **Capture Offer Response:** The candidate accepted the offer

Step 55. **Start Date**: 01/19/2016

Step 56. Click in the **Comments** field.

Step 57. Enter the desired information into the **Comments** field. Enter "**Candidate accepted the offer**".

Step 58. Click the **Done** button.

Step 59. **Use this information to complete this lesson:**

Step 60. **More Actions**: Capture Response...

Step 61. **Capture Offer Response:** The candidate accepted the offer

Step 62. **Start Date**: 01/19/2016

Step 63. Notice the Job Submission **Step** is **Offer** and the **Status** has changed to **Accepted**.

Step 64. Click the **More Actions** link.

Step 65. **Use this information to complete this lesson:**

Step 66. **More Actions**: Change Step/Status...

Step 67. Click the **Change Step/status...** menu.

Step 68. **Use this information to complete this lesson:**

Step 69. **More Actions**: Change Step/Status...

Step 70. The **Change Step and Status** - Current Step and Status in now **Offer** and **Accepted**.

Step 71. The **Information** section enables you to update the **New Step** and **Status** based on your agency process.

Step 72. In this lesson, the Step and Status will be changed to the appropriate Hire option.

Step 73. **Use this information to complete this lesson:**

Step 74. **More Actions**: Change Step/Status...

Step 75. **New Step:** Hire

Step 76. **New Status:** To be Hired

Step 77. Click the **New Step** dropdown button

Step 78. **Use this information to complete this lesson:**

Step 79. **More Actions**: Change Step/Status...

Step 80. **New Step:** Hire

Step 81. **New Status:** To be Hired

Step 82. When the **New Step** has changed to "**Hire**", the **New Status** automatically defaults to "**To be Hired**".

Step 83. Click the **Save and Close** button.

Step 84. **Use this information to complete this lesson:**

Step 85. **More Actions**: Change Step/Status...

Step 86. **New Step:** Hire

Step 87. **New Status:** To be Hired

Step 88. **Save and Close**

Step 89. Notice the Job Submission - **Step** and **Status** has changed to **Hire** and **To be Hired**.

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

Step 90. Congratulations! You have successfully completed this lesson. **End of Procedure.**

RSS - Viewing/Updating/Hiring Candidate Know-It

Section 3 - Lesson 1 Exercise, Scenario1: Viewing/Updating and Hiring a Candidate - Practice

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

Procedure

In this lesson, you will practice the steps of viewing/updating and hiring a candidate in Recruiting Self-Service.

Action

Step 1. Start Menu: **Recruiting Self-Service**

Step 2. Click the **Recruiting Self-Service** button.

Step 3. You are updating candidate information so please select the appropriate menu.

Click the **View/Update Candidate** link.

Step 4. Review/update the information for the following candidate.

Candidate Name: UATFirst 2 UATLast2

Step 5. Check to ensure that her status is **Valid.**

Step 6. Click the **vertical scroll bar**.

Step 7. Click the **horizontal scroll bar**.

Step 8. The **Candidate Disposition Status** should be Valid in order to continue with this Candidate.

Step 9. If the status is **Valid** continue by using the horizontal scrollbar.

Step 10. Click the **Horizontal Scroll bar**.

Step 11. **Save** this page.

Step 12. Click the **Save** button.

Step 13. The next step to preparing a candidate for hire is to review the candidate's Personal, Job and Payroll data.

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

Step 14. Navigate to the **Hire Candidate** page.

Step 15. Click the **Recruiting Center** button.

Step 16. Navigate to the **Hire Candidate** page.

Step 17. Click the **Hire Candidate** menu.

Step 18. Select the appropriate **Candidate Name**:

Click the **UATLast2, UATFirst2** link.

Step 19. Check the **Personal Data page** for any changes or additional information that may be required.

Step 20. The **Ethnic Group** field must be entered.

Click the **Ethnic Group** list item.

Step 21. The **Ethnic Group** for this applicant is **American Indian**.

Click the **American Indian/Alaska Native** list item.

Step 22. Click the **vertical scroll bar**.

Step 23. The **Info Release Indicators** **must** be updated for the selected candidate.

You will make selections as instructed.

Step 24. Click the **Home Address Release** list.

Step 25. Click the **Y** list item.

Step 26. Click the **SSN release** list.

Step 27. Click the **N** list item.

Step 28. Click the **Emergency Contact Info Rel** list.

Step 29. Click the **Y** list item.

Step 30. Click the **Home Telephone Release** list.

Step 31. Click the **N** list item.

Step 32. Click the **Family Info Release** list.

Step 33. Click the **N** list item.

Step 34. Navigate to **Job Data** to review and verify the Job and Payroll information.

Step 35. Click the **Job Data** link.

Step 36. Review the **Job Data** information on this page for accuracy.

Step 37. Navigate to the **Payroll Data** page and ensure all the information is accurate.

Step 38. Review this page for accuracy then select the appropriate button to **Save.**

Step 39. The **Information Center** indicates the process completed successfully.

Step 40. If there are other Candidates to view/update and hire, proceed by clicking the appropriate link on this page.

Step 41. The **Hire Candidate** page appears to enable the user to select another candidate for onboarding.

Step 42. Congratulations! You have successfully completed this lesson. **End of Procedure.**

MSS - Hiring a Candidate through MSS Know-It

Section 3, Lesson 2 Exercise, Scenario 1: Hire a Candidate through MSS Self-Service - Practice

This lesson walks through the steps in Recruiting 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

In this lesson you will practice the steps a Manager will take to select and hire a candidate in Manager Self-Service Recruiting.
Action

Step 1. Click the **Manager Self-Service** button.

Step 2. Start Menu: Manager Self-Service

This action is only available for the agencies with **MSS Full**.

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

Step 4. Select the **Candidate Name** to begin the onboarding process.

Click the **STUVLast, STUVFirst** link.

Step 5. Check the **Personal Data page** for any changes or additional information that may be required.

Step 6. Click the **Vertical scroll bar**.

Step 7. The **Info Release Indicators** **must** be updated for the selected candidate.

You will make selections as instructed.

Step 8. Click the **Home Address Release** list.

Step 9. Click the **Y** list item.

Step 10. Click the **Emergency Contact Info Rel** list.

Step 11. Click the **Y** list item.

Step 12. Navigate to **Job Data** to review and verify the job and payroll information.

Click the **Job Data** link.

Step 13. Review the **Job Data** information on this page for accuracy.

Step 14. Verify the **Effective Date** is correct.

Step 15. Review the **Payroll Data** page and ensure all the information is accurate.

Click the **Payroll Data** tab.

Step 16. **Payroll** and **Compensation** related information are 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 17. Select the appropriate button to **Save** the changes.

Click the **SAVE** button.

Step 18. There is a **Message** in the **Information Center** section.

Step 19. Select the appropriate button to **Go To** the required fields (as indicated in the Message.)

Step 20. Click the **vertical scroll bar**.

Step 21. All of the fields noted under: "**Allow the following to be released to the public:** " must be completed.

Step 22. Click the **SSN release** list.

Step 23. Click the **Y** list item.

Step 24. Click the **Family Info Release** list.

Step 25. Click the **N** list item.

Step 26. Click the **Home Telephone Release** list.

Step 27. Click the **N** list item.

Step 28. After the information has been updated, navigate to the **Payroll Data** page to save the record to hire.

Step 29. Click the **Payroll Data** link.

Step 30. Save the changes.

Step 31. Click the **SAVE** button.

Step 32. The previous message is cleared from the **Information Center.** The message now indicates the process completed successfully.

Step 33. If there are other Candidates to view/update and hire, proceed by selecting the appropriate link on this page.

Step 34. The **Hire Candidate** page appears to enable the user to select another candidate for onboarding.

Step 35. Congratulations! You have successfully completed this lesson. **End of Procedure.**

Completing the Hiring Candidate Process Know-It

Section 3, Lesson 3 Exercise, Scenario 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

In this lesson you will practice the steps of updating a candidate from the status of 'To Be Hired' to 'Hired' in CAPPS Recruiting.

Action

Step 1. **Use this information to complete this lesson:**

Start menu: **Candidates**

Candidate Name: **SOT_ttrainer, Ttrainer(00000)**

Step 2. "More Actions": **Change Step/Status**.

Step 3. Click the **Candidates Access** link.

Step 4. Click the **SOT ttrainer, Ttrainer(00000)Candidate** link.

Step 5. Notice the Candidates **Step** and **Status** is set at **Hire** and **To be Hired**. This is the information that will updated to complete the hire process for this candidate.

Step 6. In order to change the Status, you will use the **More Actions** menu.

Select the option that will allow you to change the status.

Step 7. **Use this information to complete this lesson:**

New Status: Hired - External

Step 8. **Save** and **Close** this change.

Click the **Save and Close** button.

Step 9. After **Save and Close,** the system will display this warning message regarding the status of the Requisition.

Click the **Yes** button.

Step 10. Notice the Candidates **Step** and **Status** have now been updated to **Hire** and **Hired - External**. This status indicates the Requisition is no longer active.

Step 11. Congratulations! You have successfully completed this lesson. **End of Procedure.**