



Jobscience Managing

Requisition Management

User Guide

Disclaimer of Warranties and Limitation of Liabilities

Nothing contained herein modifies or alters in any way the standard terms and conditions of the purchase, lease, or license agreement by which the product was acquired, nor increases in any way the liability of the supplier of the software, its affiliates or suppliers ("the Supplier"). In no event shall the Supplier be liable for incidental or consequential damages in connection with or arising from the use of the product, the accompanying manual, or any related materials.

Software Notice

All software must be licensed to customers in accordance with the terms and conditions of any approved and authorized license. No title or ownership of the software is transferred, and any use of the software beyond the terms of the aforesaid license, without written authorization of the publisher, is prohibited.

Restricted Rights Legend

Use, duplication, or disclosure by the Government of this manual/documentation is subject to the restrictions and protections under paragraph (b)(2) or DoD FAR 252.227-7015, Technical Data-Commercial Items (Nov. 1995) or, as applicable, FAR 52.227-19, Commercial Computer Software-Restricted Rights (June 1987). Use, duplication or disclosure by the Government of this Software is subject to the restrictions and protections set forth in Jobscience, Inc.'s standard commercial license for such Software as prescribed in DoD FAR 227.7202-4 or, as applicable, FAR 52.227-19, Commercial Computer Software-Restricted Rights (June 1987).

www.jobscience.com

Copyright © 2012, Jobscience, Inc. All rights reserved.

No part of this book may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording, or otherwise) without the prior written permission of the publisher.

Contents

Jobscience Managing: Requisition Management Manual

Preface

Welcome to Jobscience Recruiting	vi
About This Guide	vi
Who Should Read This Document	vi
Related Documentation	vi
Notation Conventions	vii

Chapter 1: Managing Overview

Logging into Jobscience Managing	2
Accessing the Managing Application	2
Tabs	4
Home Tab	4
Dashboard	4
MyTasks	4
Calendar	4
Personnel Actions Tab	5
Departments Tab	5
Dashboards Tab	5
Reports Tab	5
+ Tab	5

Chapter 2: Creating Requisitions

Creating Requisitions	8
Viewing Requisitions	11
Editing Requisitions	13
Deleting Requisitions	14
Cloning Requisitions	14

Chapter 3: Approving Requisitions

Submitting a Requisition for Approval	16
Approving a Requisition	16
Viewing Requisitions from the Dashboard	16
Viewing Requisitions from the Detail Page	17

Chapter 4: Creating Job Orders

Creating a Job Order	19
-----------------------------	-----------

Chapter 5: Reports

The Reports Tab	22
Creating Reports	23
Editing Reports	24
Deleting Reports	24
Running Reports	24
Scheduling Reports	24
Exporting Reports	25

Chapter 6: Administration

Managing Configuration Settings	27
Config Settings	28

Index

Preface

This document describes the **Jobscience** Managing product.

In This Preface

Welcome to Jobscience Recruiting	vi
About This Guide	vi
Who Should Read This Document.....	vi
Related Documentation.....	vi
Notation Conventions.....	vii

Welcome to Jobscience Recruiting

Jobscience Recruiting is the most scalable, flexible, and customizable applicant tracking system available today. With pre-configured editions for corporate Human Resources, staffing agencies, and strategic sourcing teams, Jobscience Recruiting represents the next generation of talent acquisition technology. Built 100% natively on the Force.com platform, Jobscience applications deliver the same open, mobile, and collaborative capabilities that are expected in today's social enterprise. As a three-time award winner of "Best HR & Recruiting App" by salesforce.com customers, Jobscience Recruiting allows you to manage professional, powerful, online job boards, integrate with social networks to connect with talent, and track candidates from application to placement.

About This Guide

The *Jobscience Recruiting Requisition Management User Guide* includes the following sections:

Chapter 1, Overview, provides a brief overview of the Managing application and describes how to log in to Jobscience and access the Managing application.

Chapter 2, Creating Requisitions, describes how to create, view, edit, delete, and clone requisitions.

Chapter 3, Approving Requisitions, describes how to submit a requisition for approval, as well as the process for approving requisitions.

Chapter 4, Creating Job Orders, describes how to create a Job Order for a requisition.

Chapter 5, Reports, provides basic report information, including creating, deleting, editing, running, scheduling, and exporting reports.

Chapter 6, Administration, describes administrative tasks that can be performed with the **Jobscience** Managing product.

Who Should Read This Document

This document should be read by anyone responsible for administering or using the **Jobscience** Managing product.

Related Documentation

The **Jobscience** documentation set contains the following manuals.

Jobscience Documentation

Document	Description
<i>Jobscience Recruiting Candidate Management User Guide</i>	Provides information on using the Jobscience Candidate Management application.
<i>Jobscience Recruiting Job Order Management User Guide</i>	Provides information on using the Jobscience Job Order Management application.
<i>Jobscience Recruiting Applicant Management User Guide</i>	Provides information on using the Jobscience Applicant Management application.

Jobscience Documentation (cont.)

Document	Description
<i>Jobscience Recruiting Job Board Management User Guide</i>	Provides information on setting up and managing Job Boards within the Jobscience system.
<i>Jobscience Recruiting Search Management User Guide</i>	Provides information on how to manage the Jobscience Search function.
<i>Jobscience Forms User Manual</i>	Provides information on allowing clients to create online-based forms that can be set up to create new records or update existing records within an organization when a form is filled out and submitted.
<i>Jobscience Enhanced Applicant Management System User Guide</i>	Provides information on using the Jobscience Enhanced Applicant Management System.
<i>Jobscience Managing Requisition Management User Guide</i>	Provides information on using the Managing application to automate and streamline Human Capital Management processes.
<i>Jobscience Recruiting Implementation Guide</i>	Provides information on installing the Jobscience product.

Notation Conventions

The following notation conventions are used throughout this manual.

Notation Conventions

Notation	Description	Example
ALL UPPERCASE	Acronyms	AMS EEO
Blue type	In text, the names of buttons and icons.	Click the OK button. Click the Move icon.
courier type	Directories, files names, parameters, and system messages.	The &ContactID parameter.
<i>italic type</i>	Book titles.	For more information, see the <i>Jobscience Managing Requisition Management User Guide</i> .
Green type	In text, the names of tabs, dialogs, screens, and sections within a screen.	Click the Home tab.
<u>Blue underlined type</u>	In text, hyperlinks.	Click the <u>date</u> link at the right to display the calendar.
Maroon type	In text, the name of fields, checkboxes, drop-down lists, text boxes, and columns.	Type your name in the Name field.

Chapter 1

Managing Overview

Jobscience Managing is a powerful application that allows seamless integration and collaboration between Hiring Managers and Human Resources to automate and streamline Human Capital Management processes (for example, creating a requisition, having a requisition approved, receiving information on prospective Candidates, etc.). When **Jobscience** Managing is installed along with **Jobscience** Recruiting, Hiring Managers have access to the same platform that Human Resources is using, so there is no redundancy or duplicate data entry. Instead, managers are able to communicate with Human Resources quickly and effectively, as well as share essential information.

In This Chapter

Logging into Jobscience Managing.....	2
Accessing the Managing Application	2
Tabs	4

Logging into Jobscience Managing

Logging into **Jobscience** Managing is the same as logging into your **Salesforce** instance.

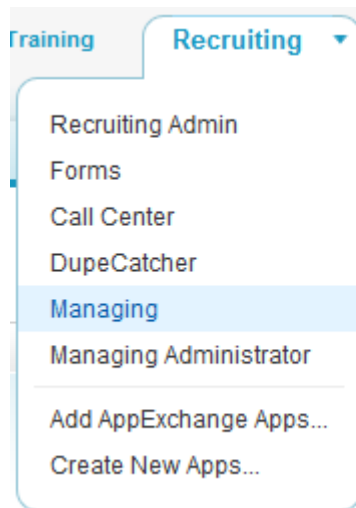
To log into Jobscience Managing

1. Enter your user ID (typically your email address) into the **User Name** field.
2. Enter your password into the **Password** field.
3. Click **Login** to display the **Home** tab.
4. If you do not see the **Jobscience** Managing set of tabs, select “Managing” from the drop-down list at the upper right corner of the screen. For more information, refer to [Accessing the Managing Application on page 2](#).

Note: If you do not have access to this application, please contact your system administrator.

Accessing the Managing Application

When the **Jobscience** Managing application is installed, the “Managing” option is added to the drop-down list at the upper right corner of the main **Jobscience** screen.



To access the Managing application, select the “Managing” option from the drop-down list. The following screen displays.

The screenshot displays the Jobscience Managing Requisition Management User Guide interface. At the top, there is a navigation bar with tabs: Home, Personnel Actions, Departments, Dashboards, and Reports. A search bar is located in the top right corner, and the user's name, Joy Case, is displayed in the top right corner.

The main content area is divided into several sections:

- Unified Search:** A search bar with a dropdown menu set to "Search All". Below the search bar are buttons for "Go!", "Limit to items I own", and "Advanced Contact Search...".
- Messages and Alerts:** A section for displaying messages and alerts.
- Resume Tools:** A section for adding and searching resumes.
- Recent Items:** A list of recent items including "0005", "0049", "test", "0007", "Arial", "US Internal", and "Billy Bass".
- Tags:** A section for displaying tags, with a "Recent Tags" button.

The user profile for Joy Case is displayed, showing the name, a profile picture, and the date "Wednesday August 17, 2011". Below the profile, there is a "Hide Chatter" button and a section for "What are you working on?". This section includes a text input field, an "Attach" button, and buttons for "File" and "Link". A "Share" button is also present.

The "Dashboard" section is located at the bottom of the page. It includes a "Refresh" button and a note: "Last refreshed at 3/21/2011 2:19 PM. Displaying data as David MacWhinnie." The dashboard is divided into three main sections:

- Users Logged In:** A gauge chart showing the number of users logged in over the last 7 days. The gauge has a red section (0-1), a yellow section (1-2), and a green section (2-3). The needle is pointing to approximately 1.5.
- # Completed Activities:** A table showing the number of completed activities over the last 30 days. The table has two columns: "Assigned" and "Record Count".
- Information Added to Sales:** A line chart showing the number of accounts added over time. The y-axis is labeled "Record Count" and ranges from 0 to 3. The x-axis is labeled "# of Accounts".

Note: These are sample pages and items. Your instance may look different depending on the customizations you requested from **Jobscience** and additional customizations you performed internally.

Please remember that access to parts of the product are dependent on individual user permissions and license limitations. Not all users will have access to everything described in this document.

Tabs

Once the Managing application is installed and accessed, the following tabs are displayed:

- **Home** tab
- **Personnel Actions** tab
- **Departments** tab
- **Dashboards** tab
- **Reports** tab
- **+** tab

The following sections provide a brief overview of each tab.

Home Tab

The **Home** tab is common for all applications. It contains the following three panels:

- Dashboard
- MyTasks
- Calendar

Note: Your instance may look different depending on the customizations you requested from **Jobscience** and additional customizations you performed internally.

Please remember that access to parts of the product are dependent on individual user permissions and license limitations. Not all users will have access to everything described in this document.

Dashboard







The Dashboard panel displays data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. They provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components, but only the top three are displayed.

MyTasks

The MyTasks panel displays a List View of your incomplete tasks.

Calendar

The Calendar panel displays a List View of future events and a calendar. You may select any item to view its details.

-  Selects personal data.
-  Selects data for all users.
-  Selects activity data.
-  Displays list views of the selected data for the current day.
-  Displays list views of the selected data for the week.
-  Displays list views of the selected data for the month.

For more information about the **Home** tab, refer to the **Salesforce documentation**.

Personnel Actions Tab

When the **Personnel Actions** tab is selected, the **Personnel Actions Home** page is displayed. From this page you are able to create new requisitions for open positions within your organization.

For more information about the **Personnel Actions** tab and creating requisitions, refer to [Creating Requisitions on page 7](#).

Departments Tab

When the **Departments** tab is selected, the **Departments Home** page is displayed. From this page you are able to identify and view each of your company's departments. You can also view the positions within each department and the pay grade that is associated with each position.

Dashboards Tab

When the **Dashboards** tab is selected, the **Dashboard Adoption Dashboard** page is displayed. From this page you are able to view data from source reports as visual components, which can be charts, gauges, tables, metrics, or Visualforce pages. They provide a snapshot of key metrics and performance indicators for your organization. Each dashboard can have up to 20 components. It is similar to the Dashboard panel on your **Home** tab except that the **Dashboards** tab provides additional information.

Reports Tab

When the **Reports** tab is selected, the **Reports Home** page is displayed. From this page you can perform numerous actions, including searching for reports, viewing, creating, editing, and deleting reports, scheduling, running, and exporting reports, and selecting or creating folders.

Note: The actions you are able to perform are dependent upon your individual user permissions. If you need assistance with your permissions, please contact your system administrator.

For more information about reports, refer to [Reports on page 21](#).

+ Tab























The **+** tab is common for all applications. When the **+** tab is selected, you can navigate to and manage the tabs that appear on your screen.

All Tabs

Help for this Page ?

Use the links below to quickly navigate to a tab. Alternatively, you can [add a tab](#) to your display to better suit the way you work.

View: All Tabs ▼ Add Tabs to Your Default Display Customize My Tabs

 Accounts Tell me more!	 Ideas
 Advanced Contact Search	 Interviews
 Applications	 Jigsaw
 Board Setup	 Job Contact Notifications
 Broadbean Setup	 Job Orders
 Business Units	 Job Templates
 Campaigns Tell me more!	 Job Templates Mapping
 Cases Tell me more!	 Leads Tell me more!
 Chatter	 Libraries
 Contacts Tell me more!	 Obsolete - DupeCatcher Settings
 Content	 Offers

From the **+** tab you may:

- Click on any icon or link to display that tab
- Filter the display of icons by selecting a different view
- Customize the default set of tabs that appear on your screen

For more information about the **+** tab, refer to the Salesforce documentation.

Chapter 2

Creating Requisitions

When a hiring manager has an open position which needs to be filled, either because someone left the company, moved on to a new position within the company, or was terminated, the first thing the hiring manager needs to do is create a new requisition. A requisition initiates the hiring process by specifying the position that needs to be filled, along with as many details about the position as possible. The more information that is provided in the requisition, the better equipped the recruiter will be to find the best possible Candidate for the position.

In This Chapter

Creating Requisitions	8
Viewing Requisitions	11
Editing Requisitions	13
Deleting Requisitions	14
Cloning Requisitions	14

Creating Requisitions

Note: These are sample pages and items. Your instance may look different depending on the customizations you requested from **Jobscience** and additional customizations you performed internally.

Please remember that access to parts of the product are dependent on individual user permissions and license limitations. Not all users will have access to everything described in this document.

When a position becomes available within an organization, the hiring manager must create a requisition before that position can be filled. You can create a new requisition at any time from within the **New Personnel Action** screen. You must fill in the **Job Title** field, but all other fields are optional. Please keep in mind that the more information you provide, the better able the recruiter will be to find the best Candidate for the position.

Personnel Action Edit

New Personnel Action

Personnel Action Edit [Save] [Save & New] [Cancel]

New Job Order Requisitions

Record Type: Requisition

Job Title:

Job Template:

Approval Status: Created

Owner: Joy Case

Department:

Position Seat Number:

Details Items

Job Order:

Requisition

Replacing Employee:

Position Type: --None--

Rotating Shifts: ☐




Weekend and/or Holiday Rotation: ☐

Shift Hours/Days:

Additional Shift Details:

To create a new requisition

- In the **New Job Order Requisitions** section, fill in the appropriate information for the new requisition:
 - Job Title**--Enter the job title for this requisition. This field is required.

- **Department**--Click  and select the department assigned to this requisition.
- **Position Seat Number**--Click  and select the seat assigned to this employee. Depending on the size of the company and the way it is set up, Position Seat Number may be one of two things:
 - An actual number that is assigned to each position within the organization. For example, if there are 10,000 employees within an organization, there will be 10,000 position seat numbers ranging from 1 to 10,000.
 - A job title. For example, Product Manager, Technical Writer, etc.
- **Approval Status**--Select the current approval status for this requisition. Whether the requisition requires approval depends on who creates the requisition and what their position is within the company. If approval is required, select “Created” from the Approval Status list. For information on determining and setting approval status options, refer to [Managing Configuration Settings on page 27](#).
- **Job Template**--Click  and select the job template that will be used when the Job Order description is pulled from the requisition record once the requisition is approved (if approval is required).

Note: If the **Job Template** field is not displayed, then the Managing connector package is not installed. Please contact your system administrator for help with installing the connector package.

- **Job Order**--Leave the **Job Order** field blank. Once the requisition is created (and approved, if required) and the Job Order is created, the **Job Order** field will be back-filled with the name of the Job Order that was created for this requisition.
2. In the **Requisition** section, fill in the appropriate information for the new requisition:
- **Replacing Employee**--If this requisition is replacing an employee, enter the name of the employee who is being replaced.
 - **Position Type**--Select the type of position from the drop-down list. Possible values are:
 - New Full-time Employee Budgeted
 - New Full-time Employee Non-Budgeted
 - Replacement Full-time Employee Budgeted
 - Replacement Full-time Employee Non-Budgeted
 - **Rotating Shifts**--Enable this checkbox if this position works a rotating shift.
 - **Weekend and/or Holiday Rotation**--Enable this checkbox if this position includes weekend or holiday work.
 - **Shift Hours/Days**--Enter a description of the shift and the hours required.
 - **Additional Shift Details**--Enter any additional details about the shift.
 - **Hours per Pay Period**--Enter the total number of required hours to be worked per payroll period.
3. In the **Request Details** section, in the **Comments** field, enter any additional information that may be helpful in obtaining approval for this requisition.
4. Click **Save** to create the requisition in the system. The new requisition is created and the **Personnel Action** screen displays with the information you provided.

Personnel Action
PAF-00022011




[Customize Page](#) | [Edit Layout](#) | [Printable](#)

[Back to List: Personnel Actions](#)






[Approval History \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Personnel Action Detail


[Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#) [Create Job](#)

 1. Fill out the PAF form
 2. Save Form
 3. Submit for Approval









▼ New Job Order Requisitions

Record Type	Requisition [Change]	Approval Status	Created
PAF #	PAF-00022011	Owner	 Joy Case [Change]
Job Title	 Sales Representative	Department	 Sales
Job Template		Position Seat Number	 Sales Executive

▼ Details Items

Job Order	 Customer Service Representatives
-----------	--

▼ Requisition

Replacing Employee	
Position Type	 New FTE Budgeted
Rotating Shifts	 <input type="checkbox"/>
Weekend and/or Holiday Rotation	 <input type="checkbox"/>
Shift Hours/Days	 1st shift, 40 hours/week
Additional Shift Details	
Hours per Pay Period	 40.00
Calculated FTE	 0.50

▼ Request Details

Once a requisition is created, you can perform the following tasks:

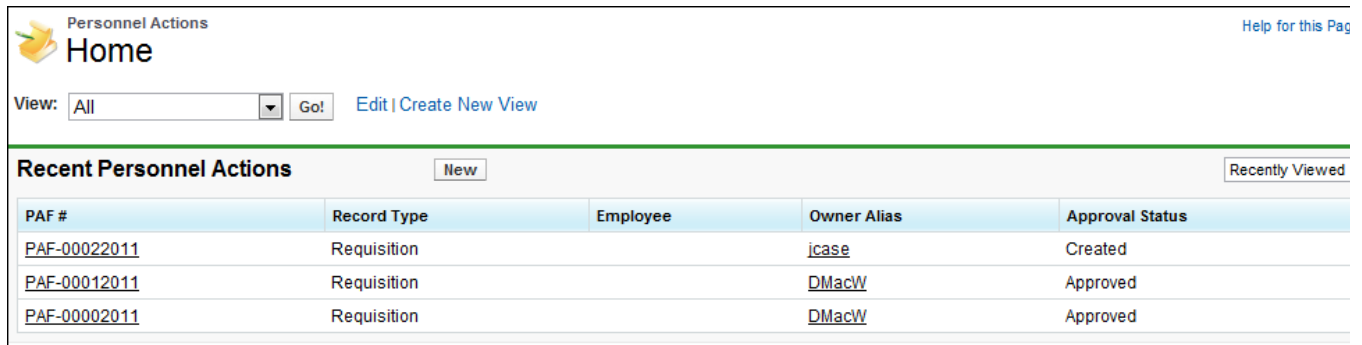
- View the requisition (refer to [Viewing Requisitions on page 11](#)).
- Make changes to the requisition (refer to [Editing Requisitions on page 13](#)).
- Delete the requisition from the system (refer to [Deleting Requisitions on page 14](#)).
- Clone the requisition so you can use it when creating other requisitions (refer to [Cloning Requisitions on page 14](#)).
- Submit the requisition for approval, if necessary (refer to [Submitting a Requisition for Approval on page 16](#)).
- Create a Job Order for this requisition (refer to [Creating a Job Order on page 19](#)).

Viewing Requisitions

You can view a requisition at any time from within the **Personnel Actions Home** screen.

To view a requisition

1. Click the **Personnel Actions** tab to display the **Personnel Actions Home** screen.



Personnel Actions Home [Help for this Page](#)


View: [Edit](#) | [Create New View](#)

PAF #	Record Type	Employee	Owner Alias	Approval Status
PAF-00022011	Requisition		icase	Created
PAF-00012011	Requisition		DMacW	Approved
PAF-00002011	Requisition		DMacW	Approved

2. If necessary, select the appropriate view in the **View** drop-down list. Requisitions associated with the selected view are displayed.

Note: To learn more about creating new or editing existing List Views, refer to the **Salesforce Help and Training**. If you purchased **Jobscience** Premiere Support, contact **Jobscience** customer support for assistance.

3. Click the [link](#) in the **PAF #** column to display the requisition in the **Personnel Action** screen.

Personnel Action

PAF-00022011




[Customize Page](#) | [Edit Layout](#) | [Printable](#)

[Back to List: Personnel Actions](#)






[Approval History \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments \[0\]](#)

Personnel Action Detail


[Edit](#) [Delete](#) [Clone](#) [Submit for Approval](#) [Create Job](#)


1. Fill out the PAF form

2. Save Form

3. Submit for Approval









▼ New Job Order Requisitions

Record Type	Requisition [Change]	Approval Status	Created
PAF #	PAF-00022011	Owner	 Joy Case [Change]
Job Title	 Sales Representative	Department	 Sales
Job Template		Position Seat Number	 Sales Executive

▼ Details Items

Job Order	 Customer Service Representatives
-----------	--

▼ Requisition

Replacing Employee	
Position Type	 New FTE Budgeted
Rotating Shifts	 <input type="checkbox"/>
Weekend and/or Holiday Rotation	 <input type="checkbox"/>
Shift Hours/Days	 1st shift, 40 hours/week
Additional Shift Details	
Hours per Pay Period	 40.00
Calculated FTE	 0.50

▼ Request Details

4. If you want to make changes to the requisition, refer to [Editing Requisitions on page 13](#) for more information.

Editing Requisitions

Once a requisition is created, you can go back and make changes to it.

To edit a requisition

1. From the **Personnel Actions Home** screen, click the [link](#) in the **PAF #** column to display the requisition you want to edit. The **Personnel Action** screen displays.
2. Click the **Edit** button. The **Personnel Action Edit** screen displays.

Personnel Action Edit [Help for this Page](#)

PAF-00022011

Personnel Action Edit Save Save & New Cancel

New Job Order Requisitions

Record Type: Requisition Approval Status: Created

PAF #: PAF-00022011 Owner: Joy Case

Job Title: Sales Representative Department: Sales

Job Template: Position Seat Number: Sales Executive

Details Items

Job Order: Customer Service Representative

Requisition

Replacing Employee: Position Type: New FTE Budgeted

Rotating Shifts: ☐ Weekend and/or Holiday Rotation: ☐

Shift Hours/Days: 1st shift, 40 hours/week

Additional Shift Details:

3. Make any necessary changes and then click **Save** to save your changes, **Save & New** to save your changes and create a new requisition, or **Cancel** to discard your changes.

Deleting Requisitions

You can delete a requisition from the system at any time.

To delete a requisition

1. From the **Personnel Actions Home** screen, click the **link** in the **PAF #** column to display the requisition you want to delete. The **Personnel Action** screen displays.
2. Click the **Delete** button and then click the **OK** button in the dialog box that displays. The requisition is removed from the system.

Cloning Requisitions

Cloning allows you to quickly create a new requisition with the same information as an existing requisition. You can then change whatever information needs to be changed and keep the rest.

To clone a requisition

1. From the **Personnel Actions Home** screen, click the **link** in the **PAF #** column to display the requisition you want to clone. The **Personnel Action** screen displays.
2. Click the **Clone** button. The **Personnel Action Edit** screen displays.
3. Make any necessary changes and then click **Save** to save your changes, **Save & New** to save your changes and create a new requisition, or **Cancel** to discard your changes.

Chapter 3

Approving Requisitions

An approval process is an automated process your organization can use to approve records in Jobscience. An approval process specifies the steps necessary for a record to be approved and who must approve it at each step. A step can apply to all records included in the process, or just records that have certain attributes. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval. Once a requisition is created, it may require approval before the process can continue. Whether the requisition requires approval depends on who created the requisition, what their position is within the company, and how the product is configured for handling submissions and approvals. For information on approval settings, refer to [Managing Configuration Settings on page 27](#). If the requisition does not require approval, you can skip the approval process and continue on with creating the Job Order. For information on creating Job Orders, refer to [Creating Job Orders on page 18](#).

In This Chapter

Submitting a Requisition for Approval	16
Approving a Requisition	16

Submitting a Requisition for Approval

You can submit a requisition for approval once the requisition is created.

To submit a requisition for approval

1. From the **Personnel Actions Home** screen, click the **link** in the **PAF #** column to display the requisition you want to submit for approval. The **Personnel Action** screen displays.
2. Click the **Submit for Approval** button and then click the **OK** button in the dialog box that displays.
3. At this point, your company's submittal and approval processes will determine how things proceed from here. For more information, refer to the **Salesforce Help and Training**.

Approving a Requisition


Once a requisition that requires approval is submitted, it must then be approved. Your company's approval process will determine how this is done. For more information, refer to the **Salesforce Help and Training**.

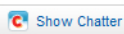
If you are allowed to approve requisitions, there are two ways to determine which requisitions are assigned to you and waiting for you to perform an action in order to move them through the approval process:

- From your Home Dashboard
- From the **Requisition Detail** page

Viewing Requisitions from the Dashboard

You can view requisitions that were submitted and are awaiting your approval from your Home Dashboard. If you have added the **Items To Approve** related list to your custom home page layouts, then those items are displayed on your Home Dashboard. This provides you with an instant view of the approval requests that need your attention. From here you can choose to approve, reject, or reassign requisitions.


[Discover Summe](#)



Items to Approve

[Manage All](#)
[Items to Approve Help](#)

Action	Related To	Type	Most Recent Approver	Date Submitted
Reassign Approve / Reject	PAF-00012011	Personnel Action	MacWhinnie, David	8/31/2011 9:33 AM

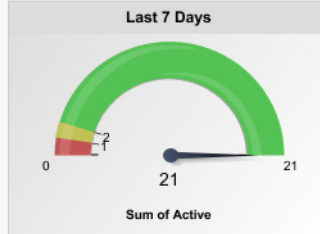
Dashboard

[Refresh](#)
[Customize](#)

Last refreshed at 8/28/2011 5:30 PM. Displaying data as API Only API Only.

Users Logged In

Last 7 Days



Sum of Active

Completed Activities

Last 30 Days

Assigned	Record Count

of Custom Reports Created

Last 30 Days

Created By	Record Count
David MacWhinnie	77
API Only API Only	76

For more information on configuring your Home Dashboard, refer to the **Salesforce Help and Training**.

Viewing Requisitions from the Detail Page

You can view requisitions that were submitted and are awaiting approval from the **Personnel Action Detail** page for a specific requisition.

Activity History
[Log A Call](#)
[Mail Merge](#)
[Send An Email](#)
[Activity History Help](#)

No records to display

Approval History
[Recall Approval Request](#)
[Approval History Help](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)						Pending
Reassign Approve / Reject	8/31/2011 9:33 AM	Pending	David MacWhinnie	David MacWhinnie		
Approval Request Submitted						
	8/31/2011 9:33 AM	Submitted	David MacWhinnie	David MacWhinnie		

Notes & Attachments
[New Note](#)
[Attach File](#)
[Notes & Attachments Help](#)

No records to display

The **Approval History** panel displays the approval history for submitted requisitions. The **Assigned To** column displays the person who is responsible for approving each requisition. From here you can choose to approve, reject, or reassign requisitions that are assigned to you.

Chapter 4

Creating Job Orders

The Hiring Manager is responsible for creating a requisition when there is a job opening to fill. Once the requisition is created and approved (if necessary), then it is the Recruiters responsibility to create the Job Order for that requisition. The Recruiter uses the requisition to obtain as much information as possible about the job opening and the type of Candidate they are looking for. Therefore, the more information the Hiring Manager includes in the requisition, the more it will help the Recruiter in finding the best Candidate for the job.

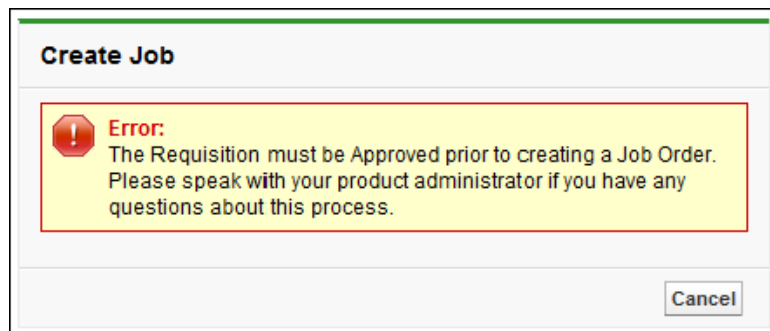
Note: In order for the recruiter to access the requisition, the Managing connector package must be installed.

In This Chapter

Creating a Job Order 19

Creating a Job Order

Once a requisition is approved (if approval is required), you can create the Job Order for that requisition. If you try to create the Job Order before the requisition is approved, or if the current status does not match the required approval status (as specified by the **Approved Status** option), then the following error message is displayed.



Note: You can configure the **Approval Required** and **Approved Status** settings. For information on configuring approval settings, refer to [Managing Configuration Settings on page 27](#).

To create a Job Order



1. From the **Personnel Actions Home** screen, click the [link](#) in the **PAF #** column to display the requisition you want to submit for approval. The **Personnel Action** screen displays for the selected requisition.

Note: The **Job Title** field must be filled in on the requisition before the Job Order can be created.

2. Click the **Create Job** button. The **Create Job** screen displays.


Note: You have the ability to show or hide specific fields on the **Create Job** screen. For information on showing and hiding these fields, refer to [Config Settings on page 28](#).

3. In the **Information** section, fill in the appropriate information for the new Job Order:
 - Select the **Record Type** for this Job Order.

- Select the **Job Function** for this Job Order.
- Select the **Department** for this Job Order. If a department was selected when the requisition was created, then the Department is populated.
- Select the **Location** for this Job Order.
- Click  and select the **Primary Recruiter** who is assigned to this Job Order.
- Click  and select the **Secondary Recruiter** who is assigned to this Job Order.

4. Click the **Create Job** button to create the new Job Order.

Once the Job Order is created, the requisition and the Job Order are tied to each other. If you view the requisition, the **Job Order** field is populated with the name of the Job Order.

<p>▼ Details Items</p> <p>Job Order  Developer</p>

If you view the Job Order, the **Requisition** field is populated with the name assigned to the requisition.

▼ Requisition Details			
Requisition	PAF-00052011	Position Seat Number	Lead Developer
Department Name	Development	Paygrade	

In addition, the new Job Order is populated with specific information that was pulled from the requisition:

- Department Name--If a Department was selected when the requisition was created, then the **Department Name** is populated on the Job Order.
- Position Seat Number--If a Position Seat Number was selected when the requisition was created, then the **Position Seat Number** is populated on the Job Order.
- Paygrade--If a Paygrade is assigned to a position seat number and that position seat number is assigned when the requisition is created, then the **Paygrade** is populated on the Job Order.

Chapter 5

Reports

A report returns a set of records that meets certain criteria, and displays it in organized rows and columns. Report data can be filtered, grouped, and displayed graphically as a chart. Reports are stored in folders, which control who has access. You must have “Read” permission on the records included in your reports; otherwise, when you run them, they may be missing data or appear blank. To help you monitor your organization, there are a wide range of standard reports, accessible in standard report folders on the **Reports** tab. You can also create new custom reports to access exactly the information you need, subtotal and limit your data to help you analyze trends and get a concise picture of what is happening in your organization.

Note: This chapter provides basic report information. For more detailed information, refer to the **Salesforce Help & Training**.

In This Chapter

The Reports Tab.....	22
Creating Reports.....	23
Editing Reports.....	24
Deleting Reports	24
Running Reports	24
Scheduling Reports.....	24
Exporting Reports	25

The Reports Tab

When the **Reports** tab is selected, the **Reports Home** page is displayed. From this page you can perform the following actions:

- Search for reports
- Select or create a folder
- View individual or all reports
- Create reports
- Edit reports
- View recently viewed, created, or modified reports
- Delete reports
- Schedule reports
- Run reports
- Export reports
- Follow or stop following a report in your Chatter feed

Note: The actions you are able to perform are dependent upon your individual user permissions. If you need assistance with your permissions, please contact your system administrator.

Creating Reports

To create a report

1. Click the **Reports** tab to display the **Reports Home** screen.

Reports Home

Tell me more! | Help for this Page

Enter keywords to find matching custom reports.

Find Report

Report Folders

Folder: Unfiled Public Reports Go! Create New Folder

All Reports Recent Reports Reorder Folders | Collapse All | Expand

Create New Custom Report

My Personal Custom Reports

Unfiled Public Reports

- Edit | Del | Export Sample Report: # of Accounts - How many accounts are being added to Salesforce?
- Edit | Del | Export Sample Report: # of Cases - How many cases have been added to Salesforce?
- Edit | Del | Export Sample Report: # of Contacts - How many contacts do we have in Salesforce?
- Edit | Del | Export Sample Report: # of Documents - How many documents have been added to Salesforce?
- Edit | Del | Export Sample Report: # of Leads - How many leads have we added to Salesforce?
- Edit | Del | Export Sample Report: # of Open Tasks - How many open tasks do each of my users have?
- Edit | Del | Export Sample Report: # of Opportunities - How many opportunities are being added to Salesforce?
- Edit | Del | Export Sample Report: # of Reports - How many custom reports have we added to Salesforce?
- Edit | Del | Export Sample Report: # of Solutions - How many solutions have been added to Salesforce?
- Edit | Del | Export Sample Report: # of Tasks and Activities - How many tasks and activities are being added to Salesforce?
- Edit | Del | Export Sample Report: Active Users - Who are my active users?
- Edit | Del | Export Sample Report: Cases Status by Rep - Who has the most open cases?
- Edit | Del | Export Sample Report: Closed Sales - How much business have I closed so far?
- Edit | Del | Export Sample Report: Completed Activities - How many activities are my users completing?
- Edit | Del | Export Sample Report: Custom Reports by User - Who is creating custom reports?
- Edit | Del | Export Sample Report: Document Library - What documents are in the document library?
- Edit | Del | Export Sample Report: Last Modified By - Who is tweaking custom reports?
- Edit | Del | Export Sample Report: Leads by Lead Source - How many leads has each lead source generated for me?
- Edit | Del | Export Sample Report: Login Leaderboard - Who is logging in the most?

2. Click the **Create New Custom Report** button. The Create New Report screen displays.

Create New Report

Select Report Type

Select Category

- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contract Reports
- Price Books, Products and Assets
- Administrative Reports
- Other Reports

Select Report Type

- Accounts
- Contacts & Accounts
- Contacts & Accounts and Candidate Source
- Contacts & Accounts and referral_id
- Accounts with Partners
- Account with Account Teams
- Accounts with Contact Roles
- Accounts with Contact Roles and Candidate Source
- Accounts with Contact Roles and referral_id
- Accounts with Assets
- Contacts with Assets
- Contacts with Assets and Candidate Source

Preview

Account Report

Account Owner	Account Name	Account Site
Joe Johnson	Acme, Inc	Headquarters
Shelly Smith	Genwatt, Inc	Headquarters
Tom Thompson	Gene Points	Headquarters

3. Select the category and the report type, and then click the **Create** button. The **Unsaved Report** screen displays.

4. Click the **Save** button. The **Save Report** dialog box displays.
5. Enter the **Report Name**, the **Unique Report Name**, and any other information you want to include, and then click the **Create** button. The report displays.

For more information on creating reports, refer to the **Salesforce Help & Training**.

Editing Reports

To edit a report

1. From the **Reports Home** screen, locate the report you want to edit.
2. Click the **Edit** link in the **Action** column next to the report. The report displays.
3. Make changes and then click the **Save** button.

For more information on editing reports, refer to the **Salesforce Help & Training**.

Deleting Reports

To delete a report

1. From the **Reports Home** screen, locate the report you want to delete.
2. Click the **Del** link in the **Action** column next to the report and then click the **OK** button when the dialog box displays. The report is deleted from the system.

For more information on deleting reports, refer to the **Salesforce Help & Training**.

Running Reports

To run a report

1. From the **Reports Home** screen, locate the report you want to run.
2. Click the **Report Name** link to display the report.
3. Click the **Run Report** button and choose **Run Report Now** from the drop-down list.

For more information on running reports, refer to the **Salesforce Help & Training**.

Scheduling Reports

To schedule a report to run

1. From the **Reports Home** screen, locate the report you want to schedule.
2. Click the **Report Name** link to display the report.
3. Click the **Run Report** button and choose **Schedule Future Runs...** from the drop-down list.
4. Enter the appropriate information and then click the **Save Report Schedule** button.

For more information on scheduling reports, refer to the **Salesforce Help & Training**.

Exporting Reports

To export a report

1. From the **Reports Home** screen, locate the report you want to export.
2. Click the **Export** link in the **Action** column next to the report. The **Export Report** screen displays.
3. Select the appropriate information for **Export File Encoding** and **Export File Format** and then click the **Export** button.
4. Choose to open or save the report file.

For more information on exporting reports, refer to the **Salesforce Help & Training**.

Chapter 6

Administration

This chapter describes administrative tasks that can be performed with the **Jobscience** Managing product.

In This Chapter

Managing Configuration Settings	27
Config Settings.....	28

Managing Configuration Settings

Within Custom Settings, the Managing Configuration option allows you to configure approval and sharing settings.

Managing Configuration Edit

Provide values for the fields you created. This data is cached with the application.

Edit Managing Configuration
Save
Save & New
Cancel

Managing Configuration Information

Name

Config

i

Approval Required

☐

Approved Status

Approved

Hiring Manager Sharing

R

Primary Recruiter Sharing

RW

Secondary Recruiter Sharing

RW

Approval Required: If selected, the requisition must have an approval status equal to the value(s) entered in the **Approved Status** field in the custom settings. If not selected, the **Approval Status** field on the requisition is ignored, and the create job process can be run at any time.

Approved Status: If the **Approval Required** setting is disabled, this setting is ignored. If the **Approval Required** setting is enabled, then the **Approval Status** field on the requisition must be equal to one of the values entered in the **Approved Status** field in order to move forward with the create job process. Multiple, comma-separated values may be entered in this field.

Hiring Manager Sharing: In a Private Model, this setting allows the client to control how to share the Job Order record with the **Hiring Manager** field on the Job Order. Possible values are:

- N=no access
- R=read only access
- RW=read/write access

Primary Recruiter Sharing: In a Private Model, this setting allow the client to control how to share the Job Order record with the **Primary Recruiter** field on the Job Order. Possible values are:

- N=no access
- R=read only access
- RW=read/write access

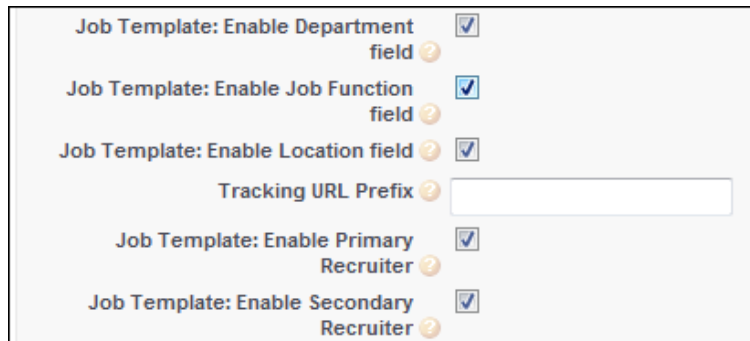
Secondary Recruiter Sharing: In a Private Model, this setting allows the client to control how to share the Job Order record with the **Secondary Recruiter** field on the Job Order. Possible values are:

- N=no access
- R=read only access
- RW=read/write access

Note: If an approval is not required, you can remove the **Approval Status** field from the Page Layout to avoid confusion.

Config Settings

Within Custom Settings, the Config option allows you to specify which fields displays on the **Create Job** screen.



The screenshot shows a configuration panel with the following settings:

- Job Template: Enable Department field ☒
- Job Template: Enable Job Function field ☒
- Job Template: Enable Location field ☒
- Tracking URL Prefix
- Job Template: Enable Primary Recruiter ☒
- Job Template: Enable Secondary Recruiter ☒

Job Template: Enable Department field: If selected, the **Department** field displays on the **Create Job** screen; if not selected, the **Department** field does not display on the **Create Job** screen.

Job Template: Enable Job Function field: If selected, the **Job Function** field displays on the **Create Job** screen; if not selected, the **Job Function** field does not display on the **Create Job** screen.

Job Template: Enable Location field: If selected, the **Location** field displays on the **Create Job** screen; if not selected, the **Location** field does not display on the **Create Job** screen.

Job Template: Enable Primary Recruiter: If selected, the **Primary Recruiter** field displays on the **Create Job** screen; if not selected, the **Primary Recruiter** field does not display on the **Create Job** screen.

Job Template: Enable Secondary Recruiter: If selected, the **Secondary Recruiter** field displays on the **Create Job** screen; if not selected, the **Secondary Recruiter** field does not display on the **Create Job** screen.

Index

Symbols

+ tab 5– 6

A

accessing
 Managing 2– 3
approving
 requisitions 16

C

Calendar 4
cloning
 requisitions 14
creating
 requisitions 8– 9

D

Dashboard 4
Dashboards tab 5
deleting
 requisitions 14
Departments tab 5

E

editing
 requisitions 13

H

Home tab 4

L

logging in 2

M

Managing
 accessing 2– 3
 logging in 2
 overview 1
 tabs 4– 6
MyTasks 4

P

Personnel Actions tab 5

R

reports
 creating 23– 24
 deleting 24
 editing 24
 exporting 25
 overview 21
 running 24

 scheduling 24
Reports tab 5, 22
requisitions
 approving 16
 cloning 14
 creating 8– 9
 deleting 14
 editing 13
 submitting for approval 16
 viewing 11– 12

S

settings
 Approval Required 27
 Approved Status 27
 Enable Department 28
 Enable Job Function 28
 Enable Location 28
 Enable Primary Recruiter 28
 Enable Secondary Recruiter 28
 Hiring Manager Sharing 27
 Primary Recruiter Sharing 27
 Secondary Recruiter Sharing 27
submitting
 requisitions 16

T

tabs
 + 5– 6
 Dashboards 5
 Departments 5
 Home 4
 Personnel Actions 5
 Reports 5, 22

V

viewing requisitions 11– 12