Quick Start Framework

Referral Programme Application User Guide

Date: 12/11/2015

Version Name: Winter ’16

Version Number: 1.0

Table of Contents

1. Introduction

1.1. Disclaimer

This software is provided by Salesforce ``as is'' and any express or implied warranties, including, but not limited to, the implied warranties of merchantability and fitness for a particular purpose are disclaimed. In no event shall Salesforce be liable for any direct, indirect, incidental, special, exemplary, or consequential damages (including, but not limited to, procurement of substitute goods or services; loss of use, data, or profits; or business interruption) however caused and on any theory of liability, whether in contract, strict liability, or tort (including negligence or otherwise) arising in any way out of the use of this software, even if advised of the possibility of such damage.

1.2. Candidate Referral Programme Application

The Referral Programme app is designed to help companies implement referral programs for their position openings.

The app provides functionality to create and manage new openings (Positions) in the system, describe the desired and mandatory skills that the candidate must have and includes a Salesforce1 mobile app that enables users to refer candidates on the go.

The main characteristics and benefits of the application are:

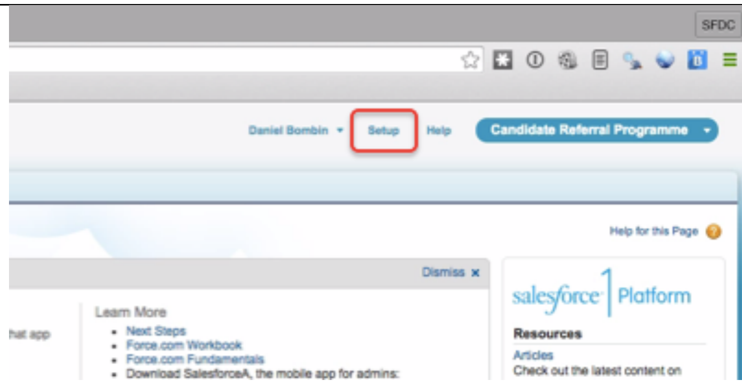
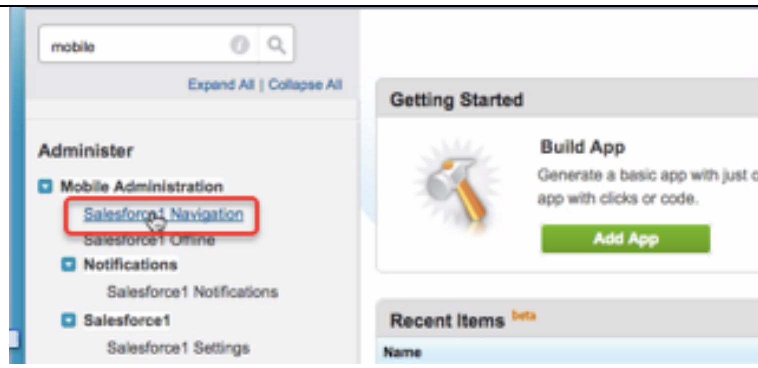
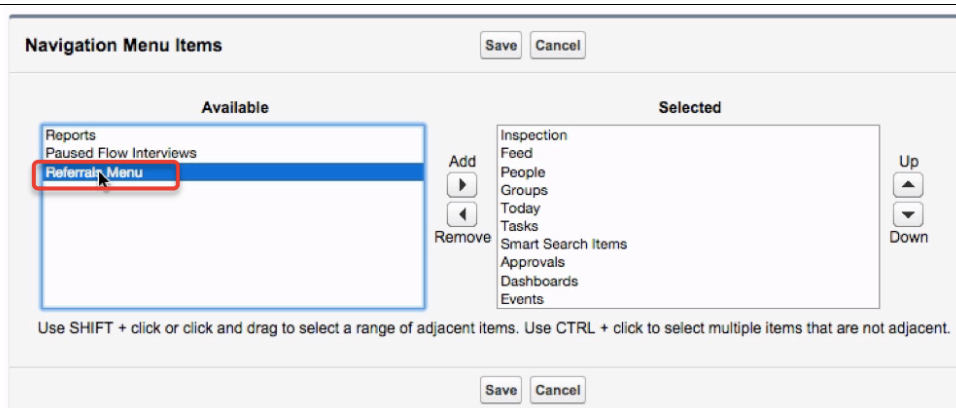
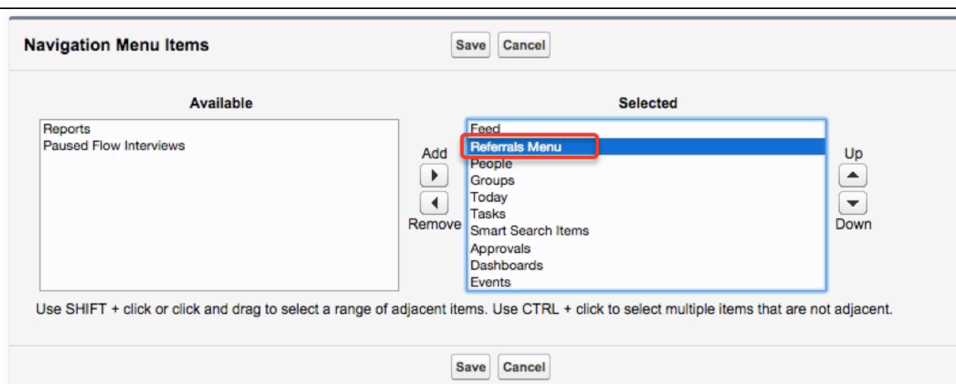
- Simple recruiting support.
    - Positions, interviews, skills and applications.
- Enables users to refer candidates in an easy and fast manner.
    - Supports attaching information to the application.
- Visual, real-time tracking of applications, referrals and positions with dashboards and reports.
- Real-time notifications to users and hiring managers on relevant events.
- Automated recruiting process to manage the positions and candidates.
    - Deadlines and statuses for positions and applications.

2. Configuration

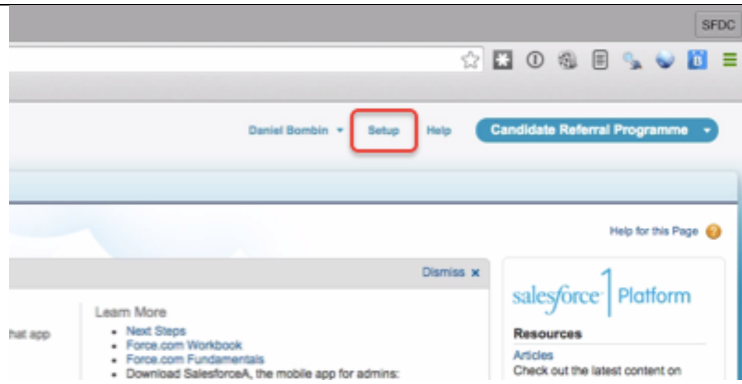
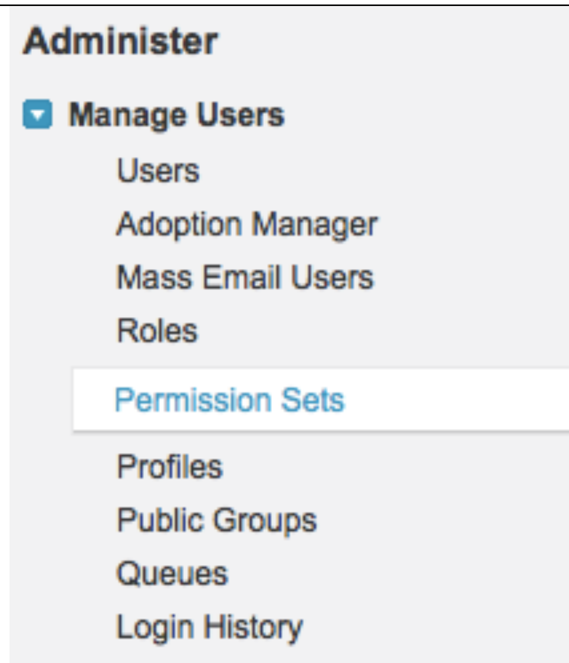
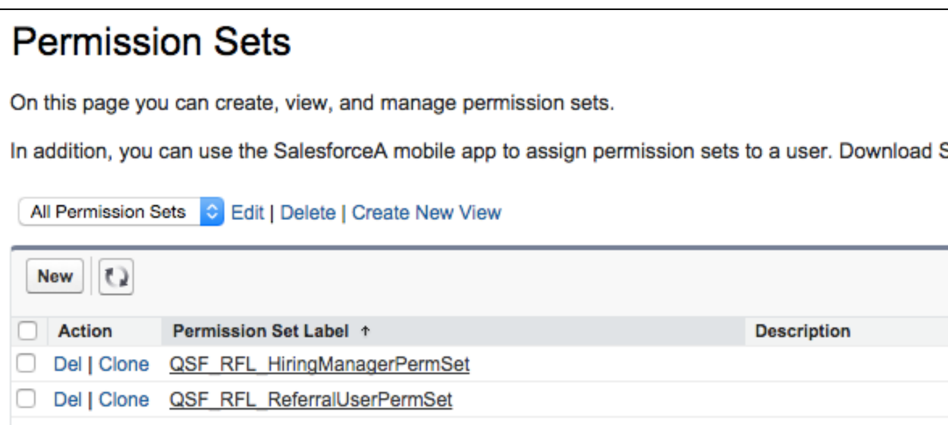
The application requires the following configuration steps:

1. Include the Referral Menu entry in the Salesforce1 navigation menu
2. Modify two permission sets
    a. Include Candidate Referral App in the assigned applications
    b. Provide System permissions to execute and manage public dashboards
3. Configure two workflow rules.
    a. Expire Position
    b. Notify Manager 10 Days Left

2.1. Adding Referrals Menu to Salesforce1 Navigation

• Go to Setup in the upper right corner.	
• In the search box, look for Mobile Administration and select Salesforce1 Navigation.	
• Find Referrals Menu in the left selection box and add it to the right box.	
• Move the entry up to the desired place and save.	

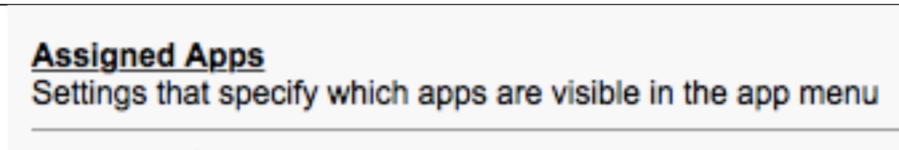
2.2. Modify Permission Sets

• Go to Setup in the upper right corner.	
• In the search box, look for Permission Sets and select it.	
• Select any of the permission sets. • **You will have to repeat the next steps with the other one.**	

<table>
<tr><td>

- Click on “Assigned Apps”.

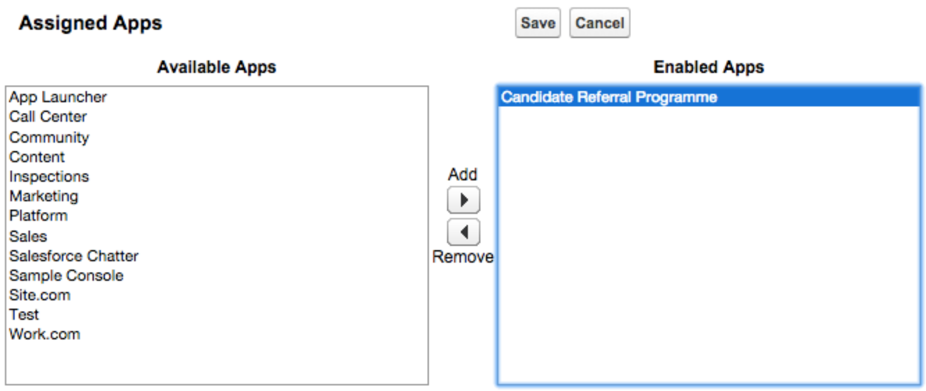
</td><td>



</td></tr>
<tr><td>

- Select “Candidate Referral Programme” in the left box and click on “Add” to move it to the right box.
- Click “Save”

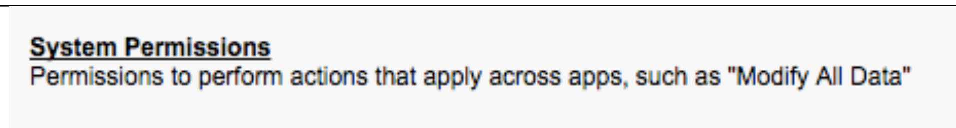
</td><td>



</td></tr>
<tr><td>

- Click on “System Permissions”

</td><td>



</td></tr>
<tr><td>

- Click on “Edit” and enable the permissions in the image.
- Click on “Save”

</td><td>

</td></tr>
<tr><td>

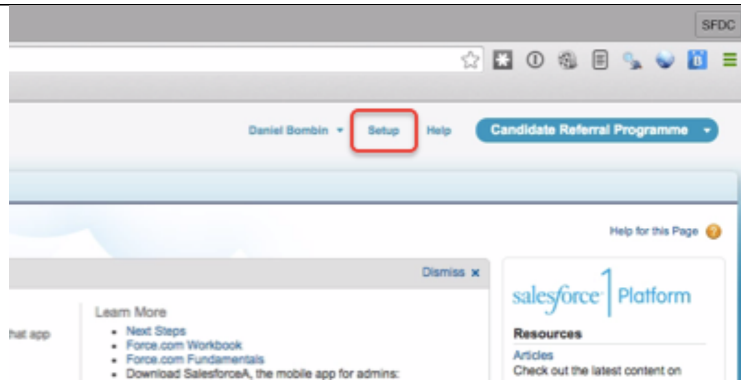
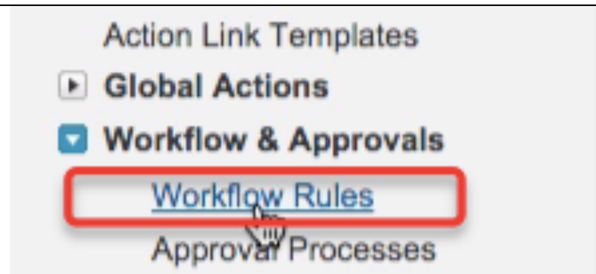
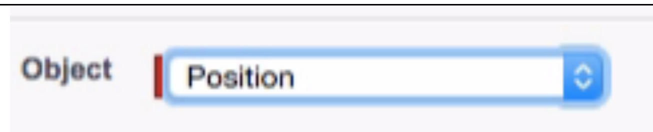
- NOTE

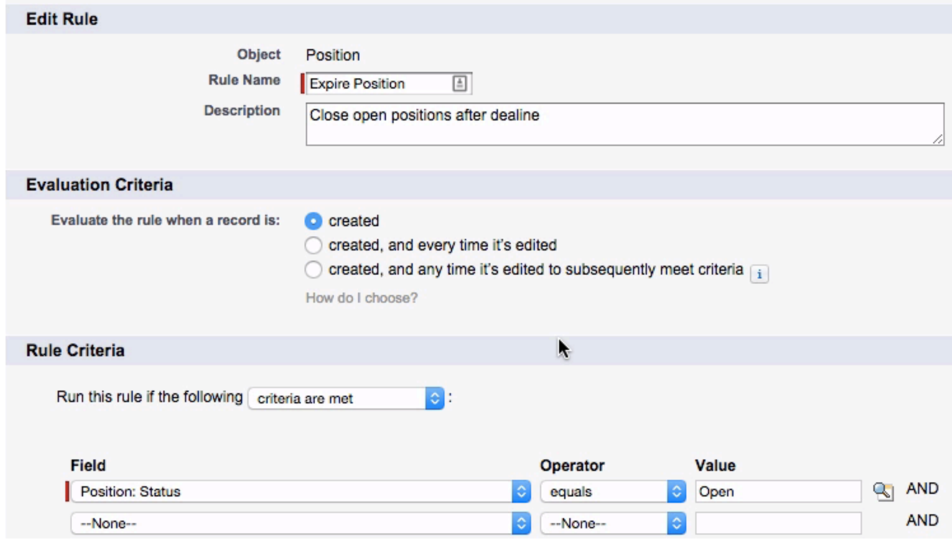
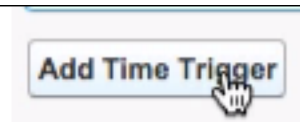
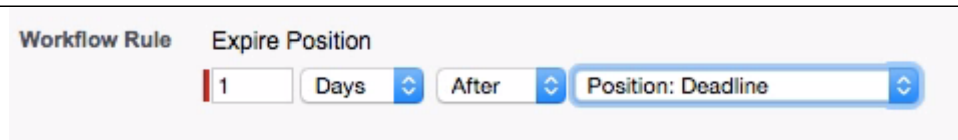
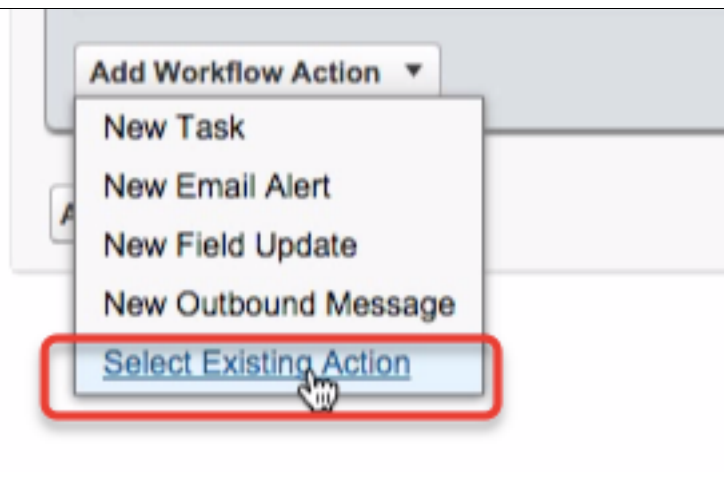
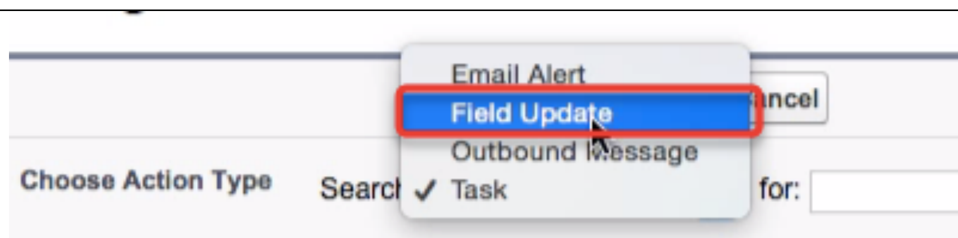
</td><td>

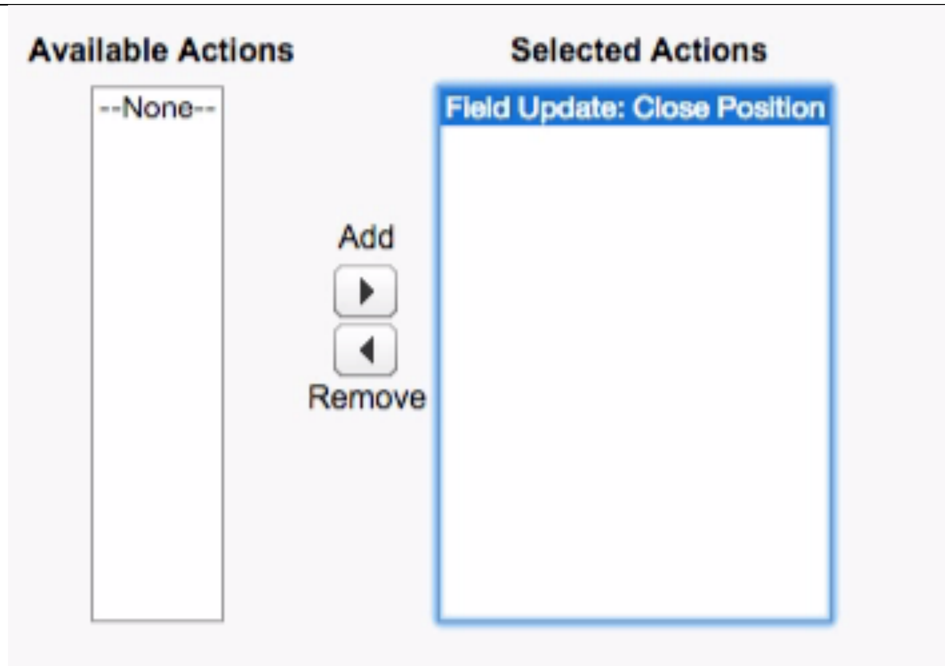
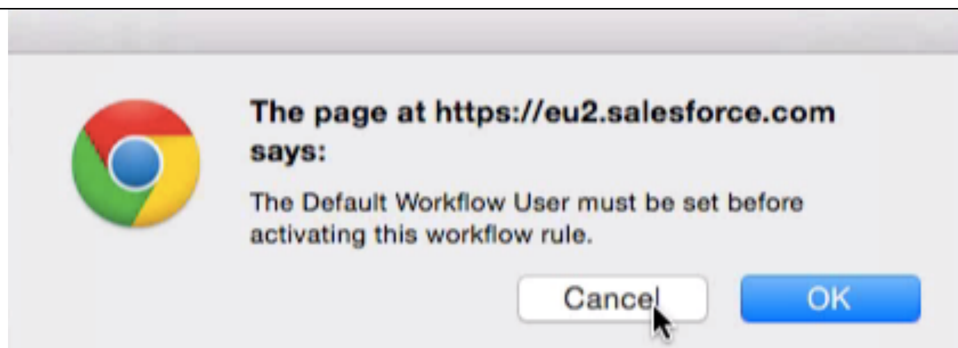
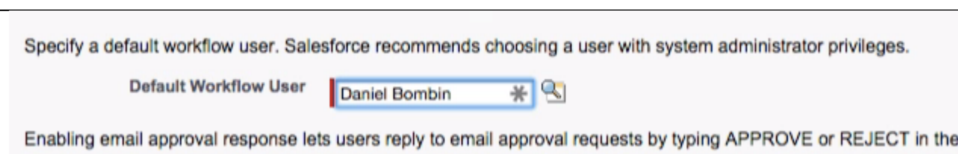
REPEAT ALL THE STEPS WITH THE OTHER PERMISSION SET

</td></tr>
</table>

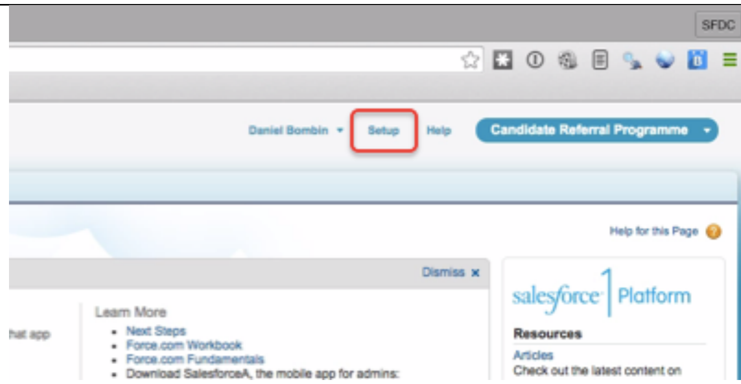
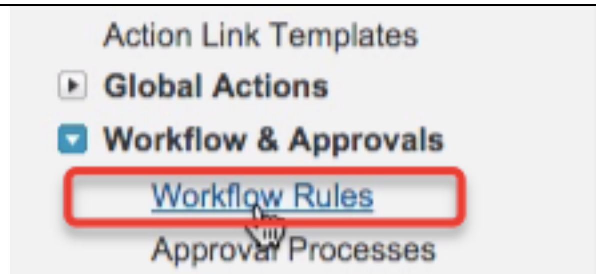
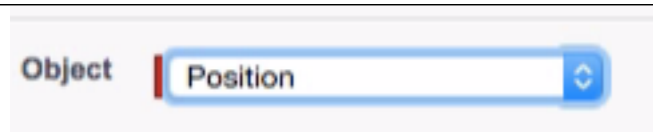
2.3. Creating the "Expire Position" Workflow Rule

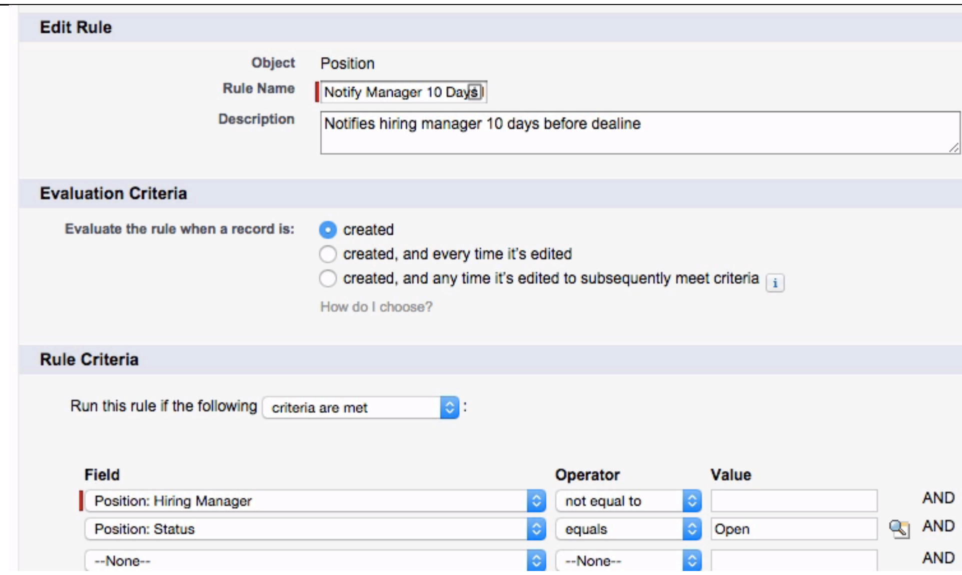
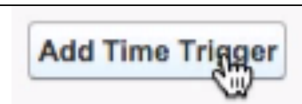
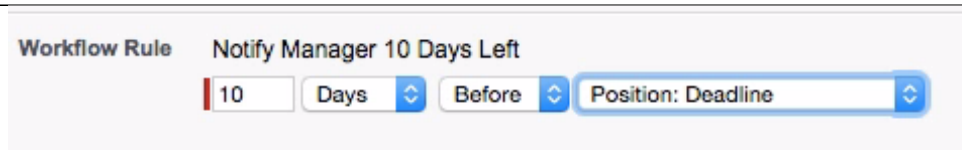
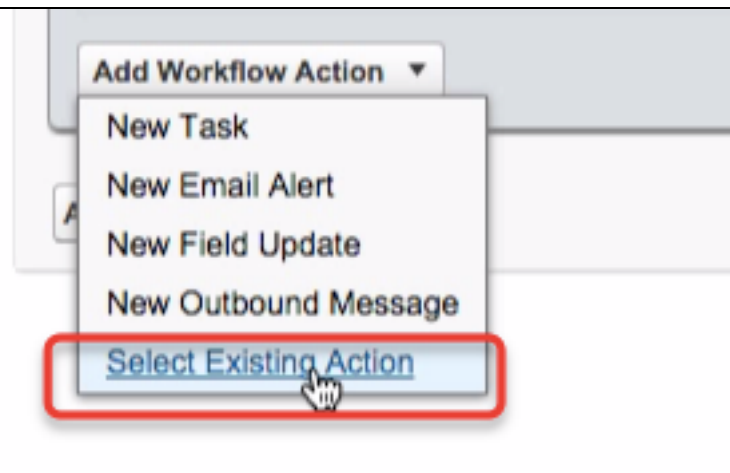
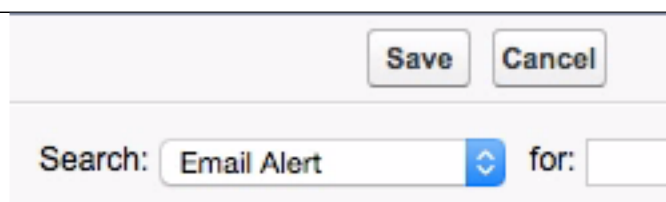
• Go to Setup in the upper right corner.	
• In the search box, look for Workflow rules and select it.	
• Click on "New Rule".	
• The rule will apply to the Position object. Select it in the combo.	

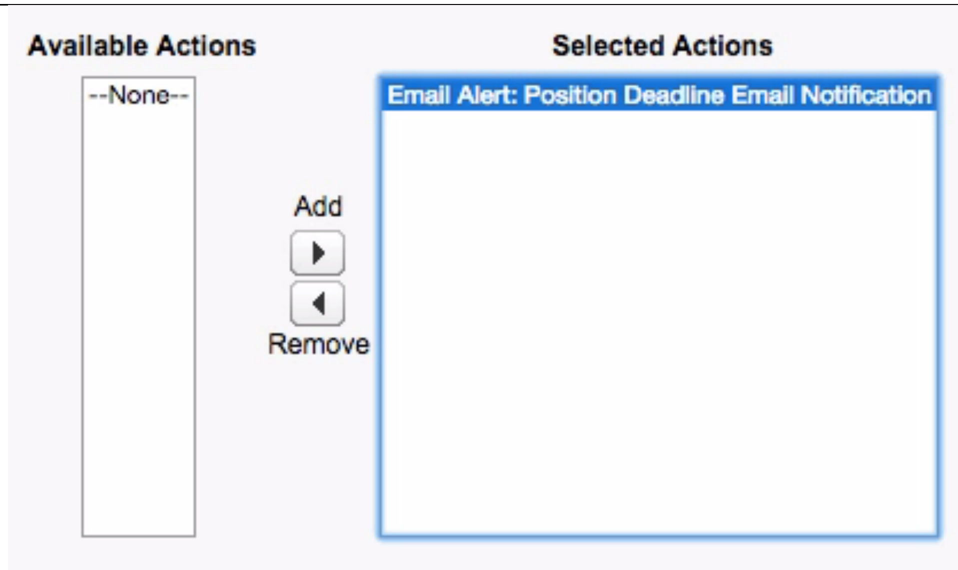
Enter the following information: • "Expire Position" as the rule name. • Select "Created" as the evaluation criteria. • Select "Position: Status" equals "Open" as the rule criteria. • Click on "Save and Next"	
• Click on "Add Time Trigger"	
• Select 1 – Days – After – Position: Deadline • Click "Save"	
• Click on "Add Workflow Action" and select "Select Existing Action"	
• In the "Search" combo select "Field Update"	

• Move the action “Field Update: Close Position” to the right table by selecting it and clicking on “Add”. • Click “Done”	
• Click on “Done”	
• Click on “Activate”	
• If you find a dialog like the one to the right, click on OK.	
• Provide a default administrator user of workflows.	

2.4. Creating the “Notify Manager 10 Days Left” Workflow Rule

• Go to Setup in the upper right corner.	
• In the search box, look for Workflow rules and select it.	
• Click on “New Rule”.	
• The rule will apply to the Position object. Select it in the combo.	

<table>
<tr>
<td>Enter the following information:
• “Notify Manager 10 Days Left” as the rule name.
• Select “Created” as the evaluation criteria.
• Select “Position: Hiring Manager”, not equals to, and leave the value empty.
• Select “Position: Status” equals “Open”.
• Click on “Save and Next”</td>
<td>
</td>
</tr>
<tr>
<td>• Click on “Add Time Trigger”</td>
<td>
</td>
</tr>
<tr>
<td>• Select 10 – Days – Before – Position: Deadline
• Click “Save”</td>
<td>
</td>
</tr>
<tr>
<td>• Click on “Add Workflow Action” and select “Select Existing Action”</td>
<td>
</td>
</tr>
<tr>
<td>• In the “Search” combo select “Email Alert”</td>
<td>
</td>
</tr>
</table>

• Move the action “Email Alert: Position Deadline Email Notification” to the right table by selecting it and clicking on “Add”. • Click “Done”	
• Click on “Done”	
• Click on “Activate”	

3. Users and Permission Sets

The application uses Platform Licenses and 2 permission sets:

1. **QSF_RFL_HiringManagerPermSet**: Enables users to create positions, interviews, skills and attachments. This permission set must be assigned to any users that are going to act as hiring managers (recruiters).

2. **QSF_RFL_ReferralUserPermSet**: Enables users to view positions and create applications, attachments and referrals. This permission set must be assigned to any user that should be able to refer candidates.

The specific permissions are as follows:

		Read		Write		
		Hiring Manager	User	Hiring Manager	User	Sharing Rules
Position						Public
	Budget	x		x		
	City	x	x	x		
	Comments	x	x	x		
	Deadline	x	x	x		
	Geography	x	x	x		
	Hiring Manager	x	x	x		
	Job Description	x	x	x		
	Referral Fee	x	x	x		
	Status	x	x	x		
Application						Private, Shared with Hiring Manager and Hierarchy
	Comments	x	x	x	x	
	Contact	x	x		x	
	Position	x	x		x	
	Status	x	x	x	x	
Referral						Private, Controlled By Application
	Application	x	x		x	
	Comments	x	x		x	
	Recommendation	x	x		x	
	Referrer	x	x		x	
	Relationship	x	x		x	
Interview						Private, Controlled By Application
	Comments	x		x		
	Passed	x		x		
Skill						Public, Controlled by Position
	Description	x	x	x		
Candidate Skill						Private for Hiring Manager
	Application	x		x		
	Checked	x		x		
	Comments	x		x		
	Passed	x		x		
	Required	x		x		
	Required_Skill	x		x		
	Skill	x		x		
Required Skill						Public, Controlled by Position
	Mandatory	x	x	x		
	Position	x	x	x		
	Skill	x	x	x		
Application Attachement						Private, Controlled by Application
	Application	x	x	x	x	
	Description	x	x	x	x	
	Type	x	x	x	x	

4. User Guide

4.1. Creating a Position

1. Select Candidate Referral Programme in the applications combo.

2. Go to the “Positions” tab.

3. Click on “New”.

4. Provide the following information:
    a. **Name (Required)**: The name of the position. A short meaningful description of the position.
    b. **Status**: Open. No applications will be allowed if the application is closed.
    c. **Hiring Manager (Required)**: The recruiter responsible for this position.
    d. **Budget**: The budget for this position. This field is only accessible by hiring managers.
    e. **Geography (Required)**: One of EMEA, APAC or AMER.
    f. **City (Required)**: The city where the employee will be based.
    g. **Deadline (Required)**: The deadline for this position to be filled.
    h. **Job Description**: A full description of the role.
    i. **Comments**: Any other comments (will be visible for users).

5. Click on “Save” to save the position.

6. Add Required Skills to the position: A list of all the skills either desirable or mandatory for this role.
    a. Click on “New Required Skill”
    b. Select the **Skill**
        i. If the skill does not exist, open the “Skills” tab in another window and create it by providing a significant name and an optional description.
    c. Check the “**Mandatory**” box to indicate that if the candidate must meet this requirement in order to continue with the recruitment process.
        i. In order to allow for more flexibility, this rule is not enforced by the application by rejecting candidates that don’t meet a certain requirement.

7. Repeat step 6 as many times as needed.

NOTE: See video *“New Position Video Tutorial”* in your Documents tab in Salesforce in folder QSF_RFL_Documents.

4.2. Creating a Referral

1. Open Salesforce1 app in your mobile device.
    a. Provide credentials and grant access if necessary.

2. Select “Referrals Menu” in the app menu.

3. Tap on “Refer a Friend”.

4. Select the geography for the position you are looking for.
    a. The Cities combo will be filled with all the cities that have open positions.

5. Select the city for the position.
    a. A list of all the open positions for that city will display.

6. Select the position by tapping on its name.

7. Enter the candidate details:
    a. **Name (Required)**: The name of the candidate.
    b. **Family Name (Required)**: The family name of the candidate.
    c. **Email (Required if no phone is provided)**: The email of the candidate.
    d. **Phone (Required if no email is provided)**: The phone number of the candidate.

8. If you want to provide additional details, tap on “Details”.
    a. The additional information form will appear.

9. Provide any of the following optional details;
    a. The **relationship** of the referrer with the candidate:
        i. Relative/Family
        ii. Have worked with him.
        iii. Referred by someone else.
        iv. Other
    b. Indicate if you’d like to **recommend** the candidate **or** just **refer** him.
    c. Any other additional **comments**.

10. Tap on “Send” to save the referral.
    a. An application with a set of candidate skills and a referral will be created in Salesforce.
    b. A contact will also be created if there are no contacts in the system with the same phone number or email address.
    c. A “thanks” . post will be created mentioning the referrer.
    d. A notification Chatter post will be created in the hiring manager feed.
    e. The referrer will automatically follow the application.

11. If you want to include any attachments with the application, tap on “Add Attachment”.

12. Select the **type** of the attachment **(required)**:
    a. Curriculum Vitae.
    b. Pictures.
    c. Presentation letters.
    d. Other attachments.

13. Tap on the file textbox to select a **file**:
    a. From the camera, the camera roll or any other application that contains files (i.e. Dropbox).

14. Provide an **optional description**.

15. Tap on “Upload”.

16. Repeat steps 11 to 16 as many times as needed.

17. When you are done, tap on “Done”
    a. That will return to the Referrals Menu

NOTE: See video *“New Referral Video Tutorial”* in your Documents tab in Salesforce in folder QSF_RFL_Documents.

4.3. Processing an Application

1. Once a new application is created, the hiring manager will be notified in Chatter and in his mail.

2. Log into Salesforce and got to your Chatter feed, look for the notification email and click on the link to the application.

3. Once in the application, you can check the details, the referral (if any) and the set of required skills and the attachments.
    a. In order to open an attachment, click on its name, that will take you to the attachment view, once there, click on “View”.

4. Click on the contact name to go to the contacts view and get his contact details.
    a. Phone number / email address.

5. Once you start with the recruitment process, change the state of the application to “Process Started”.

6. Have all the required interviews with the candidate.
    a. For each interview, create an interview related to the application by clicking on “New Interview” and providing your feedback.
        i. **Comments**.
        ii. Click on **passed** if you consider that the candidate “passed” the interview and should proceed with the recruitment process.
    b. After checking the candidate skills in any of the interviews, go to the application and click on “Edit” in each of the “Candidate Skills”.
        i. Select “**Checked**” if you checked that skill with the candidate.
        ii. Select “**Passed**” if the candidate meets that requirement.

7. Once you are done with the recruitment process, change the **status** of the application to:
    a. Accepted if the candidate is selected for the position.
        i. This will notify the referrer with a congratulations Chatter post.
        ii. This will close the position and all the other applications to the position.
    b. Rejected if the candidate is rejected.

NOTE: See video *“Application Processing Video Tutorial”* in your Documents tab in Salesforce in folder QSF_RFL_Documents.

4.4. My Referrals menu entry

1. Open Salesforce1 app in your mobile device.
    a. Provide credentials and grant access if necessary.

2. Select "Referrals Menu" in the app menu.

3. Tap on "My Referrals".
    a. A list of all the referrals by the user will be displayed.

4. Typing on the "Search" box will filter the referrals looking for the specified text in the referrals fields.
    a. Referrals can also be filtered by status by writing:
        i. Waiting
        ii. Process Started
        iii. Accepted
        iv. Rejected
    b. Accepted referrals will show in green and rejected referrals will show in red.

NOTE: See video *"My Referrals Video Tutorial"* in your Documents tab in Salesforce in folder QSF_RFL_Documents.

4.5. Dashboards and Reports

The Candidate Referral application, comes bundled with a Dashboard containing the following reports:

1. **Applications By Status:** Applications grouped by status for this current fiscal year.

2. **Applications Per Position:** Number of applications per position.

3. **Positions Without Applications:** Open positions that have no applications.

4. **Positions Expiring This Month:** Open positions that will expire in the current month.

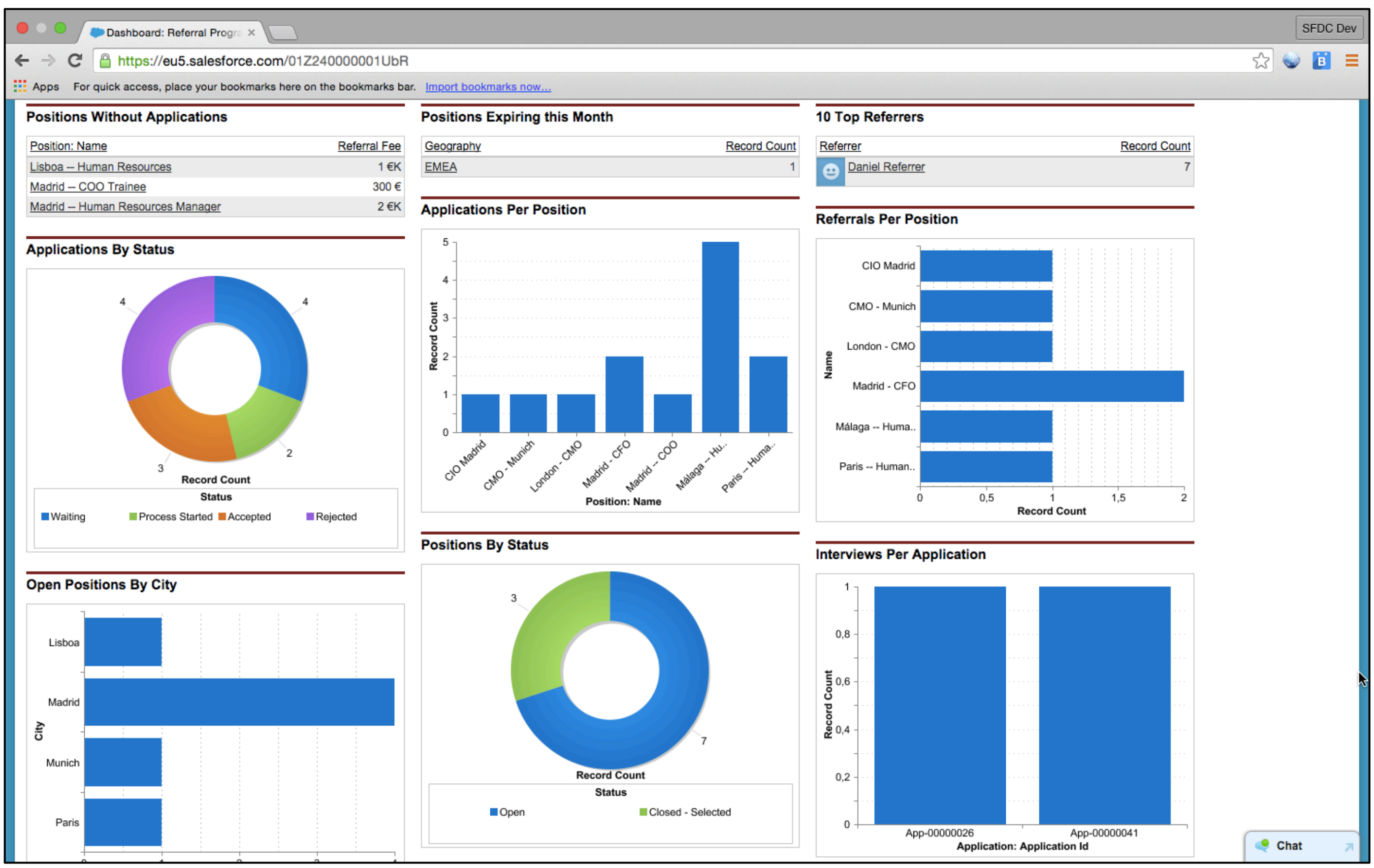
5. **Open Positions By City:** Number of open positions by city.

6. **Positions By Status:** All the positions grouped by status.

7. **Top 10 Referrers:** List of the 10 users with more referrals.

8. **Referrals Per Position:** Number of referrals per position.

9. **Interviews Per Application:** Number of interviews per application.



5. Technical Information

5.1. Objects

The Candidate Referral Programme application uses the following objects:

1. **Position (QSF_RFL_Position__c):**
   The object used to contain the job positions for the application. Contains information of the position (budget, city, geography, hiring manager, deadline, etc) and a list of skills required for the position.

   It is the parent object in the relations with:
   a. Required Skills
   b. Application

2. **Skill (QSF_RFL_Skill__c):**
   An object used to contain generic, reusable skills with name and description, used in conjunction with:
   a. Required Skill
   b. Candidate Skill

3. **Required Skill (QSF_RFL_Required_Skill__c):**
   Describes the required skills for a position, it contains a Skill and has a field to indicate is a skill is required for a position, that is, candidates that don't meet a mandatory skill, should be turned down.

   This object has two parent objects:
   a. Position
   b. Skill

4. **Application (QSF_RFL_Application__c):**
   Used to contain applications for the positions. It contains information on the candidate, attachments, referrals, candidate skills, interviews, comments and a status.

   This object has the following relations:

   a. Contact:
      - The candidate information.
   b. Application Attachments.
   c. Referrals:
      - The application allows for more than one referral by application.
   d. Candidate Skills
   e. Interviews

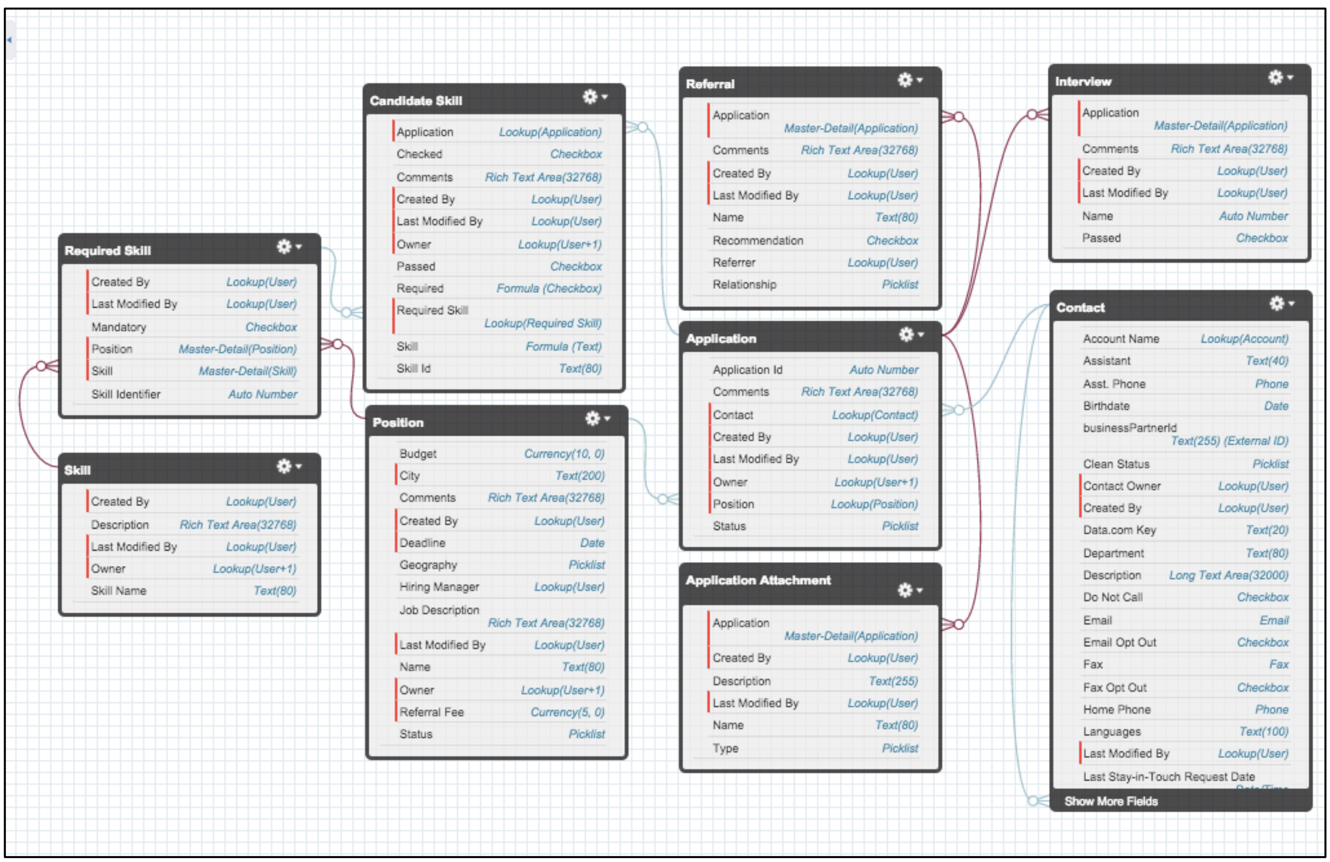
5. **Application Attachment (QSF_RFL_Application_Attachment__c):**
   Contains attachments to the application with a type and an optional description. Parent object is Application.

6. **Candidate Skill (QSF_RFL_Candidate_Skill__c):**
Contains the required skills of the position for this specific application. Contains the skills plus two checkboxes to indicate if the skill has been checked with the candidate and if the requirement is met. Children in the relations with:
   a. Skill
   b. Application

7. **Referral (QSF_RFL_Referral__c):**
Contains referrals to Applications. It has fields to contain the referrer, the relation between the referrer and the candidate, whether the referrer wants to recommend the candidate and comments. It acts as children in the relation with Application.

8. **Interview: (QSF_RFL_Interview__c):**
Contains interviews of the hiring manager with the candidate, with a checkbox to indicate if the candidate passed the interview (and continues in the selection process) and comments. It acts as children in the relation with Application.

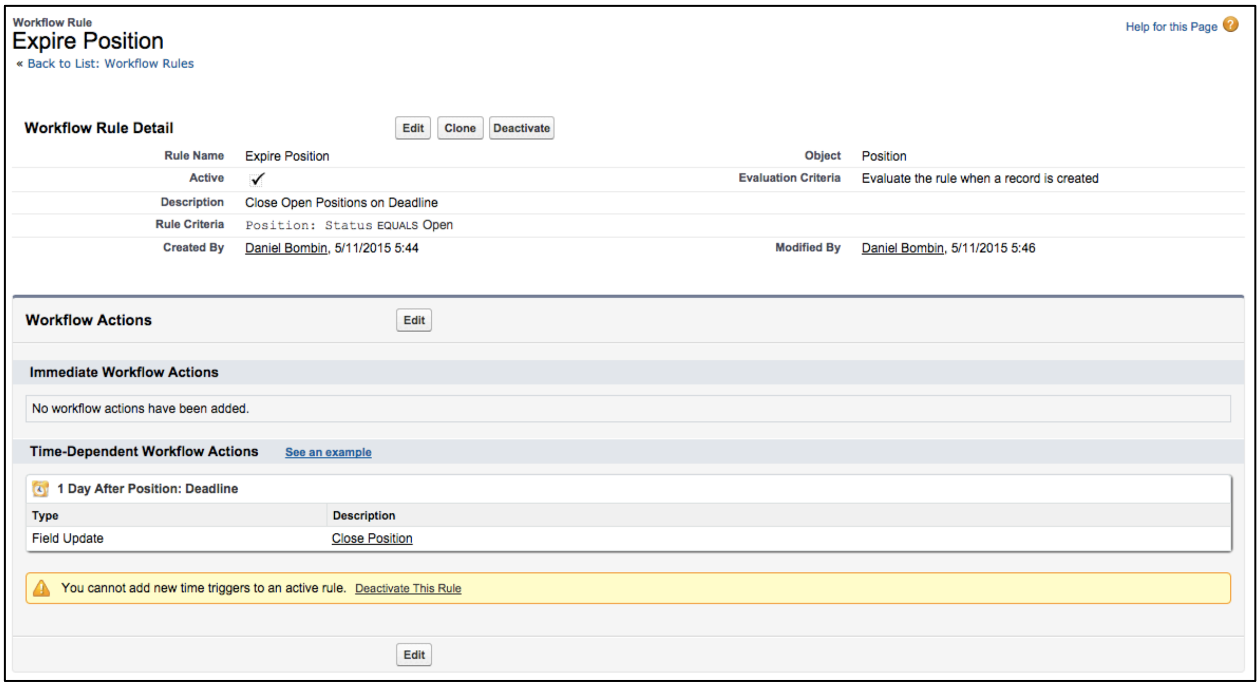
9. **Contact (Contact):**
The standard object, used to contain contact details for the candidate.



5.2. Workflow Rules

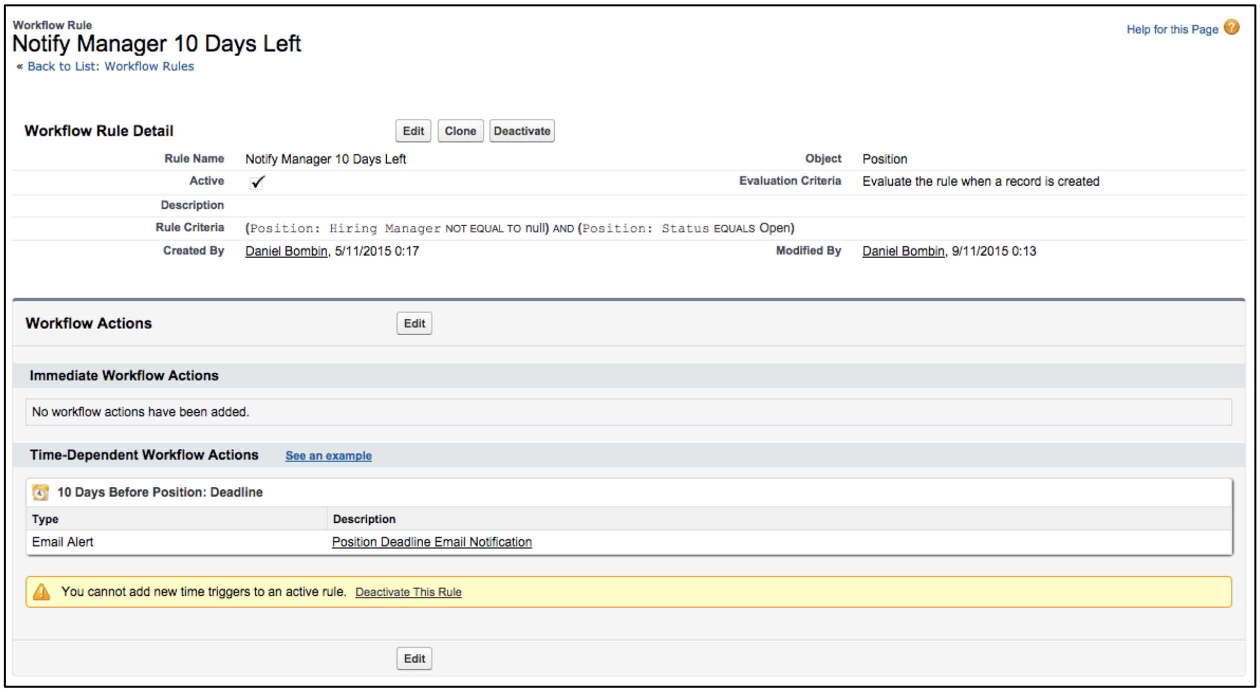
The Candidate Referral Programme application requires the following workflow rules, these rules are not bundled with the application because time triggered actions can't be packaged and need to be created after the package installation.

1. **Expire Position**: Closes the position after the deadline if it is still open. See 2.3 for information on how to create this rule.



2. **Notify Manager 10 Days Left**: Sends an email notification to the hiring manager of an open position when there are only 10 days left before the deadline. See 2.4 for information on how to create this rule.

   It uses the Deadline Notification Email Template (QSF_RFL_Deadline_Notification_Template).



5.3. Triggers

The Candidate Referral Programme application contains the following triggers:

1. **QSF_RFL_ApplicationBeforeInsertTrigger:** Before Insert on Application.
    - Changes the ownership of the application to the hiring manager.

2. **QSF_RFL_ApplicationInsertedTrigger:** After insert on Application.
    - Creates and adds the candidate skills based on the position's required skills.
    - Notifies hiring manager via Chatter post.

3. **QSF_RFL_ApplicationStatusChangedTrigger:** After update on Application.
    - If the update has changed the status to "Accepted":
        - Closes the position (triggering QSF_RFL_PositionStatusChangedTrigger).
        - Notifies referrers via Chatter @mention.

4. **QSF_RFL_PositionStatusChangedTrigger:** After update on Position.
    - If the update has changed the status to "Closed":
        - Rejects all applications whose status is not "Accepted".

5. **QSF_RFL_ReferralInsertedTrigger:** After insert on Referral.
    - Shares the related application with the referrer.
    - Makes referrer follow the application.
    - Thanks the referrer via Chatter post.

5.4. Pages

The Candidate Referral Programme application contains 3 different Visualforce pages, all of them use Salesforce Lightning Design System for coherence with Lightning Experience UIs.

The Visual force Pages in the application are:

1. **QSF_RFL_NewReferralPage:** The page used to create new Referrals, enables users to select a position after filtering them by Geography and City and then to create a Referrals by providing contact details and some other optional candidate information. After the referral is created, the user can attach documents to it.

2. **QSF_RFL_ReferralListPage:** This page displays a list of all the referrals by the user. The list can be filtered using a free-text pattern.

3. **QSF_RFL_ReferralsMenuPage:** The Referrals Menu Page. With links to New Referral and My Referrals.

5.5. Classes

The Candidate Referral Programme application contains the following APEX classes:

1. **QSF_RFL_NewReferralController:**
   The controller for the QSF_RFL_NewReferralPage page.

   Exposes the following RemoteActions:
   - public static List<String> getCitiesForPositionsInGeo(String geo)
   - public static List<Position> getPositionsInCity(String city)
   - public static QSF_RFL_Position__c getPosition(String id)
   - public static Map<String, String> createReferral(Map<String, String> values)
   - public static List<QSF_RFL_Application_Attachment__c> getAttachments(String applicationId)

   Exposes VF action to upload attachments.

2. **QSF_RFL_ReferralListController:**
   The controller for the QSF_RFL_ReferralListPage page.

3. **QSF_RFL_ReferralProgramServices:**
   Miscellaneous services for the whole application. Exposes the following methods:
   - public static void followApplication(QSF_RFL_Referral__c referral)
     - Makes the current user follow the application related to the referral.

   - public static void shareApplicationWithReferrer(QSF_RFL_Referral__c referral)
     - Shares the application related to the referral with the referrer.

   - public static void notifyHiringManager(String applicationId)
     - Posts a notification of the new application to the hiring manager feed. Including a link to the application.

- public static void notifyReferrerOnSelection(String referralId)
    - Posts to the referral related application Chatter feed mentioning the referrer to notify referrer when the referred candidate is selected.

- public static void thankReferrer(String referralId)
    - Posts to the referral related application Chatter feed the referrer to thank referrer for the referral.

- public static void postToReferrer(QSF_RFL_Referral__c referral, String text)
    - Supporting method to post to the referral related application Chatter feed with the supplied text mentioning the referrer.

4. **QSF_RFL_ReferralsAppTests:**
   All the tests for the application.