📄 User Manual – Allocate Requirement Form

📌 Document Overview

- Title : User Manual – Allocate Requirement Form

- Purpose : To guide HR personnel and recruiters on how to use the Allocate Requirement form to assign a created job requirement to recruiters, teams, freelancers, or vendors.

- Target Audience :

    - HR Recruiters

    - Talent Acquisition Team

    - Internal Recruiters

🧩 1. Introduction

The Allocate Requirement form is used after creating a job requirement to assign it to the relevant parties , such as recruiters, teams, freelancers, or vendors.

This form allows users to:

- Select who should receive the job requirement .

- Choose individuals or groups for allocation.

- Submit the form to finalize the assignment.

💂 2. Accessing the Form

1. After completing the Add Requirement form, you will be redirected to the Allocate Requirement screen.

2. Alternatively, navigate to the direct URL (e.g., /allocate-requirement).

3. The form will load with all fields ready for input.

📋 3. Step-by-Step Guide to Fill the Form

◆ Section 1: Choose Allocation Type

Fields:

- Allocate to (Check one or more options)

    - All

        - Allocates the job requirement to everyone.

    - Recruiters

        - Allows selection of individual recruiters.

    - Teams

        - Allows selection of teams (lead and members).

    - Freelancers

        - Allows selection of freelance recruiters.

    - Vendors

        - Allows selection of vendor companies.

Note : Checking "All" automatically selects all other checkboxes.

◆ Section 2: Select Recruiters (if selected)

Fields:

- A list of recruiters is displayed.

- Each has a checkbox.

Steps:

1. Check the boxes next to the recruiters you want to allocate the job to.

2. Selected recruiters will be included in the final allocation.

◆ Section 3: Select Teams (if selected)

Fields:

- Each team has:

- A Team Lead checkbox.

- A list of team members checkboxes.

Steps:

1. Select the Team Lead checkbox to include all team members.

2. Or select individual team members only.

3. Deselecting a team member does not uncheck the lead.

◆ Section 4: Select Freelancers (if selected)

Fields:

- A list of freelancers is displayed.

- Each has a checkbox.

Steps:

1. Check the boxes next to the freelancers you want to allocate the job to.

2. Selected freelancers will be included in the final allocation.

◆ Section 5: Select Vendors (if selected)

Fields:

- A list of vendors is displayed.

- Each has a checkbox.

Steps:

1. Check the boxes next to the vendors you want to allocate the job to.

2. Selected vendors will be included in the final allocation.

📋 4. Submitting the Form

1. After selecting the required allocation options, scroll to the bottom of the form.

2. Click the "Submit" button.

3. The job requirement will be allocated to the selected individuals or groups.