



Bring Efficiency to your Hiring Process



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1 Introduction

TargetRecruit helps add efficiency to hiring process by automation and integration. TargetRecruit is build on force.com platform with very high adoption and retention rate. It provides a centralized system for sales and recruiting with extended applications to go beyond traditional recruiting with intelligent and customizable reports, dashboards and analytics.

SaaS (Software as a Service) allows access to the business applications and related services over the Internet that would otherwise have to be located on the company's own personal or enterprise computers.

Since, TargetRecruit has been designed on the SaaS architecture it enjoys unprecedented flexibility in application deployment and customization, shorter implementation cycles, and guaranteed up-time.

TargetRecruit can help:

- **Increase your hire rate and reduce your operating cost**
Intelligent skill matching for jobs and candidates to reduce time spent on searching the right candidate.
- **Improve communication with hiring managers and candidates**
Use customizable templates and track all touch points with hiring managers and candidates. Use integrated marketing campaigns to gain mind share.
- **Get control on your own process**
Create workflows around your hiring, screening and other processes. Get control by creating a process that works for your organization.
- **Get better insight by customizable reporting and from dashboard**
Get instant reporting for measure from marketing campaign to contact management to recruiting. Get insight into trends and manage key performance indicators. Effectively compete using powerful analytics.
- **Expandable platform**
Open architecture to integrate with third party products to have an integrated recruiting platform for your company. Integrated with Salesforce.com for CRM features.

Get the TargetRecruit Advantage

Avankia provided excellent customer service and hands-on training when they implemented TargetRecruit at Zycron. They helped us customize the software to fit **our specific needs**, and now we have real-time information that is accessible to everyone in our company. The transition to TargetRecruit has **simplified our day-to-day processes and offers us minute-by-minute updates, one-click submittals and convenient templates that improve the efficiency of our daily operations.**

Darrell Freeman

Chairman and CEO of Zycron, Inc

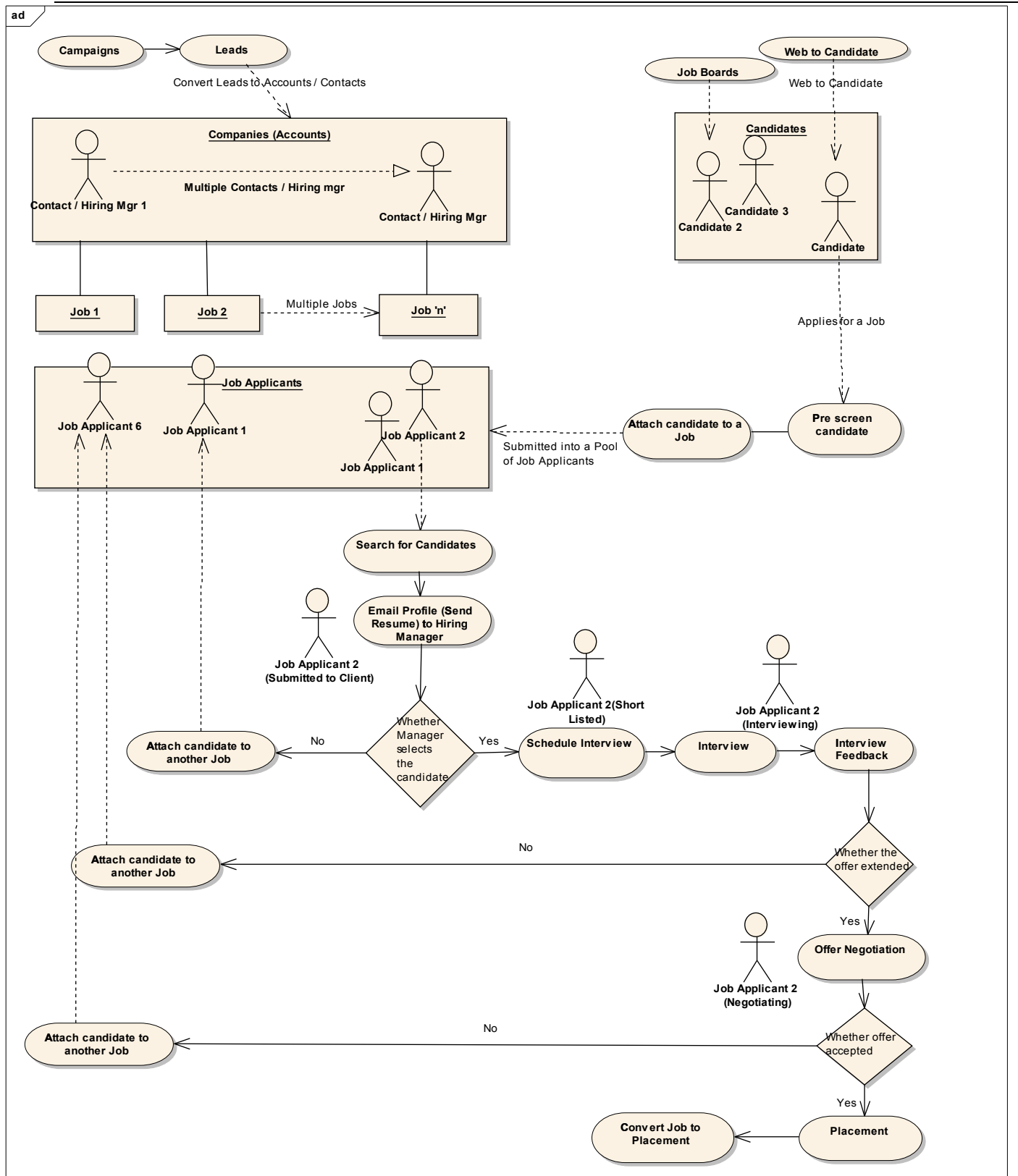


Figure 1: TargetRecruit Workflow Diagram

2 Features

2.1 Home

Home is the landing page for the users after they login. Home page can be completely customized for each user for their unique needs.

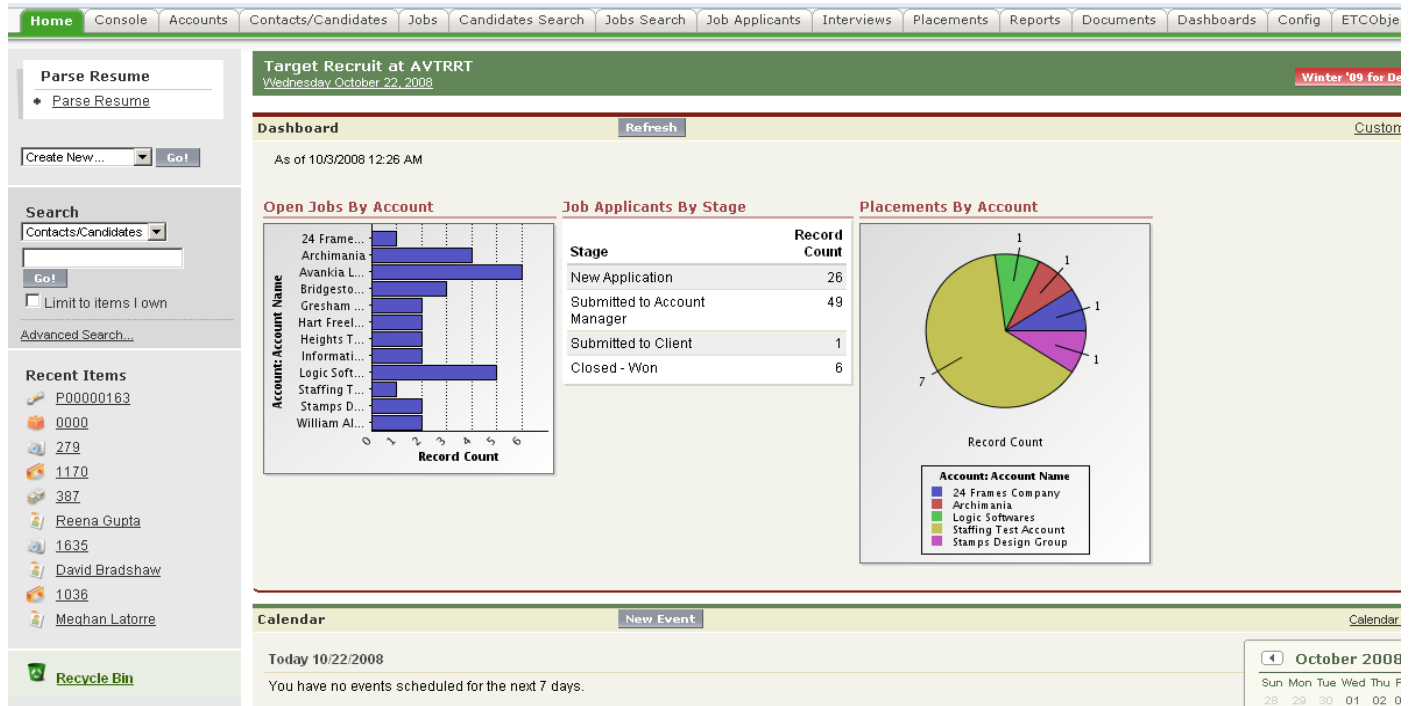


Figure 2: Home Page Details

Home page by default displays the following components:

2.1.1 Personalized Dashboards

Displays list of Dashboards which is relevant to the logged in user. When the Dashboard is clicked it displays the report that is used for creating the Dashboard.

2.1.2 Events and Tasks

Displays list of meetings and tasks for the logged in user. New meetings and tasks can be created from there as well. TargetRecruit also have synchronization applications with MS Outlook, Gmail, Lotus Notes, etc, which needs to be installed by each user. For Further information on installing the integration, please visit help and training links.

2.1.3 Links

➤ Recent Items

Items visited recently are displayed in that list. When the link is clicked, it displays the item details.

➤ Create New

New Items can be created from this menu instead of going to the item tab and selecting New button.

➤ Parse Resume

Resumes can be parsed using this link and displays the detail page.

➤ Tags

Tag lists are displayed when this link is clicked. To get the list of items in the Tag, click the tag name link.

2.1.4 Search

It allows doing quick search by the item name. A specific item can be selected for searching or all items can be searched.

2.1.5 Advanced Search

It allows doing more advanced Boolean keyword search. It searches for the keywords in all the fields in the selected items instead of just the name of the item.

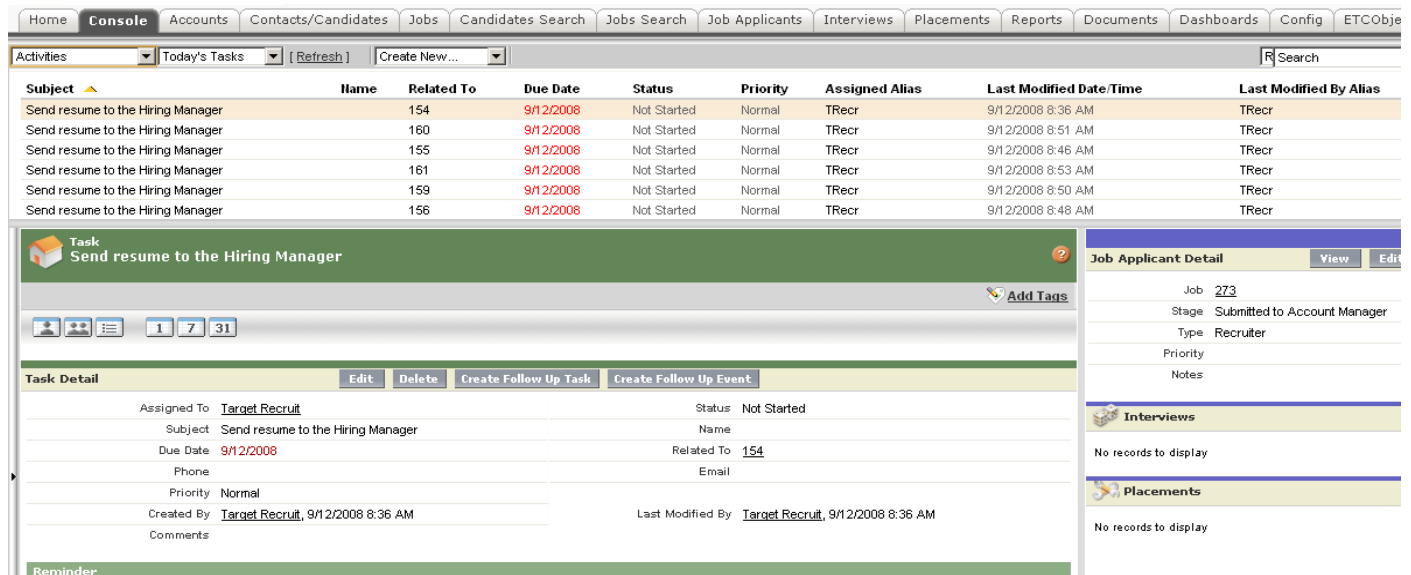
2.2 Manage Activities

Following items are considered as activities. Please refer to online Help and Training links to learn more about it and how to utilize it for managing it for contacts and candidates.

- Emails
- Events
- Tasks
- Calls

2.3 Console

Console gives a split screen view for selected items. It can be customized for the items to be displayed in the view. Top section of the screen allows various parameters to be selected and displays the list of items. Bottom portion of the screen shows the complete details of the selected item and all its related items details.



The screenshot displays the TargetRecruit Console interface. At the top, there is a navigation bar with tabs: Home, Console (selected), Accounts, Contacts/Candidates, Jobs, Candidates Search, Jobs Search, Job Applicants, Interviews, Placements, Reports, Documents, Dashboards, Config, and ETC/Other. Below the navigation bar, there is a search bar and a list of activities. The list of activities is as follows:

Subject	Name	Related To	Due Date	Status	Priority	Assigned Alias	Last Modified Date/Time	Last Modified By Alias
Send resume to the Hiring Manager	154		9/12/2008	Not Started	Normal	TRecr	9/12/2008 8:36 AM	TRecr
Send resume to the Hiring Manager	160		9/12/2008	Not Started	Normal	TRecr	9/12/2008 8:51 AM	TRecr
Send resume to the Hiring Manager	155		9/12/2008	Not Started	Normal	TRecr	9/12/2008 8:46 AM	TRecr
Send resume to the Hiring Manager	161		9/12/2008	Not Started	Normal	TRecr	9/12/2008 8:53 AM	TRecr
Send resume to the Hiring Manager	159		9/12/2008	Not Started	Normal	TRecr	9/12/2008 8:50 AM	TRecr
Send resume to the Hiring Manager	156		9/12/2008	Not Started	Normal	TRecr	9/12/2008 8:48 AM	TRecr

Below the list of activities, there is a detailed view of a task titled "Send resume to the Hiring Manager". The task details are as follows:

Task Detail	
Assigned To	Target Recruit
Subject	Send resume to the Hiring Manager
Due Date	9/12/2008
Phone	
Priority	Normal
Created By	Target Recruit, 9/12/2008 8:36 AM
Comments	
Status	Not Started
Name	
Related To	154
Email	
Last Modified By	Target Recruit, 9/12/2008 8:36 AM

On the right side of the console, there is a sidebar with sections: Job Applicant Detail (View, Edit), Interviews (No records to display), and Placements (No records to display).

Figure 3: Console Details

2.4 Accounts

Accounts are used to keep track of any type of companies – whether it is a prospect, customer, competitor, vendor, etc. Account view page displays all the details of the account including list of contact, jobs, applicants, interviews, placements and all other communication details within that account. It keeps track of all the notes, attachments as well.

Additional data elements can be easily added to the accounts detail and page layouts can be changed as well from the UI based customizations steps. For more information on customizations, please visit Help and Training links.

Account Detail
Edit
Delete
Include Offline

Account Owner	TargetRecruit [Change]	Rating	
Account Name	Avankia LLC [View Hierarchy]	Revenue	\$1,000,000
Parent Account		Exchange	
Phone	(615) 429-5462	Symbol	
Fax		Time Zone	-CST
Website	http://www.avankia.com	SIC Code	
Jobs Website		Employees	50
Industry	Technology	Year Started	2,000
Ownership		Type	

Address Information
Vendor Management System
System Information

Edit
Delete
Include Offline

Contacts/Candidates
New Contact/Candidate
Merge Contacts/Candidates
Contacts/Candidates Help

Action	Contact/Candidate Name	Title	Email	Phone
Edit Del	Reena Gupta	CEO	reena.gupta@avankia.com	(615) 429-5462
Edit Del	Rajeev Gupta	CTO	rajeev.gupta@avankia.com	(615) 429-5462
Edit Del	Meghan Latorre		reena.gupta@avankia.com	(615) 429-5462

Jobs
New Job
Jobs Help

Action	Job Num	Job Title	Hiring Manager	Account Manager	Stage	Expected Start Date
Edit Del	272	Test	Praveen Ramachandra	TargetRecruit	Open	10/11/2008
Edit Del	291	SF Developer			Open	5/5/2008
Edit Del	292	Business Analyst		Corporate User	Open	5/4/2008

Contact/Candidate Detail		Edit	Delete	Clone	Request Update
Contact/Candidate Owner	TargetRecruit [Change]			Contact/Candidate Record Type	Contact [Change]
Account Name	Avankia LLC			Home Phone	
Name	Meghan Latorre			Phone	(615) 429-5462
Title				Mobile	
Reports To	View Org Chart			Email	reena.gupta@avankia.com
Department				Fax	
Languages				Assistant	
Birthdate				Asst. Phone	
Lead Source				Other Phone	
LinkedIn Contact	Get Contact Info				
LinkedIn Contact Detail	Get Contact Detail Info				
Mailing Address	Cobble Street Nashville, TN 32456 USA			Other Address	
Created By	TargetRecruit, 10/7/2008 8:19 AM			Last Modified By	TargetRecruit, 10/15/2008 5:19 AM
Description					
<a>Edit <a>Delete <a>Clone <a>Request Update					

Jobs New Job Jobs Help ?						
Action	Job Num	Job Title	Account	Account Manager	Stage	Expected Start Date
Edit Del	1602	HR Specialist	Avankia LLC	TargetRecruit	Open	10/7/2008

Job Applicants New Job Applicant Job Applicants Help ?						
Action	Job Applicant ID	Candidate	Job	Job Title	Stage	Available To Start
Edit Del	1036	David Bradshaw	1602	HR Specialist	Closed - Won	10/20/2008

Interviews Interviews Help ?				
Action	Interview ID	Candidate	Interview Time	Type Of Interview
Edit Del	364	David Bradshaw	10/7/2008 8:34 AM	Online

Placements Placements Help ?				
Action	Placement ID	Candidate	Job Num	Start Date
Edit Del	P00000149	David Bradshaw	1602	10/7/2008

Opportunities New Opportunity Opportunities Help ?	
No records to display	

Open Activities New Task New Event Open Activities Help ?	
No records to display	

Activity History Log A Call Mail Merge Send An Email Request Update View All Activity History Help ?						
Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Meeting		<input type="checkbox"/>	10/21/2008 5:00 PM	TargetRecruit	10/21/2008 4:22 PM
Edit Del	Email: Interview Change Notification		<input checked="" type="checkbox"/>	10/20/2008	TargetRecruit	10/20/2008 11:03 AM
Edit Del	Interview for David Bradshaw with Avankia LLC	364	<input type="checkbox"/>	10/7/2008 8:34 AM	TargetRecruit	10/15/2008 5:19 AM

Campaign History Add Campaign Campaign History Help ?	
No records to display	

Notes & Attachments New Note Attach File Notes & Attachments Help ?	
No records to display	

HTML Email Status		Send An Email	View All	HTML Email Status Help ?	
Action	Subject	Date Sent	Date Opened	# Times Opened	Last Opened
Edit Del	Email: Interview Change Notification	10/20/2008 11:03 AM	10/20/2008 11:03 AM	1	10/20/2008 11:03 AM

Expenses	New Expense	Expenses Help ?
No records to display		

Figure 5: Contact Details

2.6 Candidates

Candidates are the people who are interested in finding Job opportunities either actively or passively.

2.6.1 Creating Candidates

There are several ways to create candidates as described below:

2.6.1.1 Creating Manually

- Select Candidate Tab
- Click New Button
- Select Candidate Record Type
- Enter all the relevant information in the candidate creation form.
- Click Save Button

Contact/Candidate Edit Save Save & New Cancel

Contact/Candidate Information = Required Information

<p>Account Name <input type="text"/></p> <p>First Name <input type="text" value="--None--"/></p> <p>Last Name <input type="text"/></p> <p>Candidate Status <input type="text" value="--None--"/></p> <p>Internal Candidate <input type="checkbox"/></p> <p>Resume Source <input type="text" value="--None--"/></p> <p>Experience <input type="text" value="--None--"/></p> <p>Education <input type="text" value="--None--"/></p> <p>Education Details <input type="text"/></p> <p>Candidate Write Up <input type="text"/></p>	<p>Contact/Candidate Record Type</p> <p>Resume Received Date <input type="text" value="10/21/2008"/></p> <p>Online Profile Link <input type="text"/></p> <p>Video Resume Link <input type="text"/></p> <p>Recruiter <input type="text"/></p> <p>Open For Relocation <input type="checkbox"/></p> <p>Percentage of Travel <input type="text"/></p> <p>Work Status <input type="text" value="--None--"/></p> <p>Background Check <input type="text" value="--None--"/></p> <p>Time Zone <input type="text" value="--None--"/></p> <p>Birthdate <input type="text"/></p> <p>Confirmation <input type="checkbox"/></p> <p>Jobs Notified <input type="text"/></p> <p>Notes and Comments <input type="text"/></p>
--	---

EEO

Gender <input type="text" value="--None--"/>	Veteran Status <input type="text" value="--None--"/>
Ethnicity <input type="text" value="--None--"/>	

Skills

Skillset

Figure 6: New Candidate Creation Details

2.6.1.2 Parsing Resumes

- Click on Parse Resume Link on the left hand side menu.
- Select the Resume file. It supports doc, pdf, txt formats. It also parses multiple resumes if zip file is given for parsing.
- Check the box to update existing candidate information needs to be updated.
- Click on Parse Resume button.

Home Console Accounts Contacts/Candidates Jobs Candidates Search Jobs Search Job Applicants Interviews Placements Reports Documents Dashboards Config ETCOI	<div> Parse Resume * Parse Resume </div> <div> Create New... <input type="button" value="Go!"/> </div> <div> Search <input type="text" value="Contacts/Candidates"/> <input type="button" value="Go!"/> <input type="checkbox"/> Limit to items I own Advanced Search... </div> <div> Recent Items Avankia LLC Meghan Latorre 1171 Raineeth Kaur DATA WAREHOUSING P00000164 285 388 Venkat Ramesh </div>	<div> Parse Resume </div> <div> Select Resume : <input type="button" value="Choose File"/> No file chosen Update existing candidates : <input type="checkbox"/> </div> <div> Note : Please select the resume in doc, txt, rtf, pdf, html format. </div> <div> <input type="button" value="Parse Resume"/> </div>
---	---	---

Figure 7: Parse Resume Details

2.6.1.3 Online Applications

- Candidates can apply online from the website or Job boards and the candidate information will be created directly in TargetRecruit.
- Notifications will be sent to the recruiters when the online application is created in the system.

Candidate Information						
Selected Jobs						
Job Category	Job Title	Job Summary	Job Term	Job City	State	
Advertising	Software Product Development	Join the people that build software for business applications. Compuware's Product Development Centers allow you to be an integral part of developing award-winning software. Software Developers participate in the analysis design and implementation phase of the product life cycle for developing new software and enhancements of new products and/or features that have been identified by Product Management, prototyped by Product Planning, and assigned by Project Management. The Software Developer develops, codes, tests, and debugs new software or enhancements to existing software. Developers work with technical staff and customers to understand software problems and to resolve them.	3-6 Month Contract	Chicago	TN	
* indicates required fields						
General Information						
First Name*	<input type="text"/>					
Last Name*	<input type="text"/>					
Street Address	<input type="text"/>					
City	<input type="text"/>					
State	<input type="text"/>					
Country	<input type="text"/>					
Zip/Postal Code	<input type="text"/>					

Gender

Race/Ethnic Group (choose all that apply)

Veteran Status

Resume

Confirmation

☐ I confirm that to the best of my knowledge, the information contained in this application is accurate. I understand omissions or misrepresentations may be cause for rejection or, if employed, may be just cause for subsequent dismissal.

Figure 8: Online Application Details

2.6.1.4 Creating from Emails

- Forward the email with the resume to a predefined email id.
- To find the predefined email id, click on Set link on top of the page. Under App Setup menu on the left hand side select Develop link and then select Email Services. Click on the emailtocandidate service name on the right hand side and the email address will be defined on that page in the format “emailtocandidate@6fimt3v7hrdxc0sgdgk4787t.in.salesforce.com”.
- Details of the emails being processed can be viewed under ETCObjects tab.

Home Console Accounts Contacts/Candidates Jobs Candidates Search Jobs Search Job Applicants Interviews Placements Reports Documents Dashboards Config ETCObj

Personal Setup

- My Personal Information
- Email
- Import
- Desktop Integration

App Setup

- Customize
- Create
- Develop
 - Apex Classes
 - API
 - Components
 - Email Services
 - Pages
 - S-Controls
 - Static Resources
 - Tools
- View Installed Packages

Administration Setup

- Manage Users
- Company Profile
- Security Controls
- Communication Templates
- Data Management
- Monitoring
- Mobile Administration
- Offline Administration New!

Email Service: EmailToCandidate [Help for](#)

[Edit](#) [Deactivate](#) [Cancel](#)

Email Service Name	EmailToCandidate
Apex Class	EmailToCandidateEmailHandler
Accept Attachments	All
Advanced Email Security Settings	<input type="checkbox"/> i
Accept Email From	avankia.com
Active	<input checked="" type="checkbox"/>

Failure Response Settings

Over Email Rate Limit Action	Bounce message
Deactivated Email Address Action	Bounce message
Deactivated Email Service Action	Bounce message
Unauthenticated Sender Action	Bounce message
Unauthorized Sender Action	Bounce message

Email Addresses [New Email Address](#)

Action	Email Address	Context User
View Edit	emailtocandidate@6fimt3v7hrdxc0sgdgk4787t.in.salesforce.com	TargetRecruit

Figure 9: Email to Candidate Setup Details

ETCObjects
Home

Help for this Page ?

View: All Go! Edit | Create New View

Recent ETCObjects

New

Recently Created Go!

ETCObject Name	Name	Result	Status
ETC-000112	FW: Emailing: Hansbanneker.doc		New
ETC-000109	FW: Emailing: Hansbanneker.doc	Attachment Hansbanneker.doc: Candidate Created.	Completed
ETC-000059	FW: Email to candidate		New
ETC-000058	FW: Email to candidate		New
ETC-000057	FW: Emailing: kily james.doc, MEENA MEHTA.doc	Attachment kily james.doc: Candidate Updated. Attachment MEENA MEHTA.doc: Required fields are missing: [LastName]	Error
ETC-000056	FW: Resume Test	Attachment Sibasish Sahoo.doc: Candidate Updated.	Completed
ETC-000055	Resume Test	Attachment Sibasish Sahoo.doc: Candidate Created.	Completed
ETC-000053	Emailing: kily james.doc, MEENA MEHTA.doc	Attachment kily james.doc: Candidate Created. Attachment MEENA MEHTA.doc: Required fields are missing: [LastName]	Error
ETC-000051	FW: Emailing: Navyog Kumar.doc		Error
ETC-000050	Emailing: Navyog Kumar.doc	Attachment Navyog Kumar.doc: Candidate Created.	Completed
ETC-000049	Fwd: Accountemps Candidate for Review - Moe	Attachment Paki Moe.doc: Candidate Updated.	Completed
ETC-000048	Fwd: Accountemps Candidate for Review - Moe	Attachment Paki Moe.doc: Candidate Created.	Completed

Figure 10: Email to Candidate Details

2.6.2 View Candidates

Candidates view page can show the complete information about the candidate along with details on jobs that the candidate has been applied for, Interview scheduled and Placements for the candidate. It also shows the entire communication history including emails, tasks, and events.

[Show 15 more](#) | [Go to list 100 / 72](#)

Job Applicants New Job Applicant Job Applicants Help ?					
Action	Job Applicant ID	Job	Job Title	Stage	Available To Start
Edit Del	1036	1602	HR Specialist	Closed - Won	10/20/2008
Edit Del	1066	1633	Interim CFO	Closed - Won	10/20/2008
Edit Del	1070	1634	Interim CFO -1	Submitted to Account Manager	10/20/2008

Interviews Interviews Help ?			
Action	Interview ID	Interview Time	Type Of Interview
Edit Del	364	10/7/2008 8:34 AM	Online
Edit Del	371	10/8/2008 8:40 AM	Phone

Placements Placements Help ?	
No records to display	

Open Activities New Task New Event Open Activities Help ?	
No records to display	

Activity History Log A Call Mail Merge Send An Email Request Update View All Activity History Help ?						
Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Interview for David Bradshaw with	371	<input type="checkbox"/>	10/8/2008 8:40 AM	Target Recruit	10/21/2008 8:40 AM

Figure 11: View Candidate Details

2.6.3 Auto Search Job List

It also displays the list of matching jobs based on the keywords in a job and the candidate profile. The Job list allows taking mass actions on group of jobs for the candidate. For e.g. the candidate can be applied to multiple jobs from this list.

NOTE: Customized mass action buttons can be created based on the requirements.

Job List

Search: Search Search Result: 5

Note:

- a. "All" Search Result will provide max of 100 results.
- b. To perform a custom search provide the keywords separated by 'OR'
- c. Maximum of 5 keywords are allowed in the search.

Search Results

	Job Num	Skills Matched	Job Title	Account	Hiring Manager	Job Location	Exp. Start Date
<input type="checkbox"/>	283	1	Business Analyst	William Allied INC	N/A	Chicago	08/17/2008
<input type="checkbox"/>	292	1	Business Analyst	Avantika LLC	N/A	Nashville	05/04/2008

Attach Candidate to selected Job(s)

Created By TargetRecruit, 10/13/2008 3:13 PM Last Modified By TargetRecruit, 10/15/2008 5:19 AM

Edit Delete Clone Request Update

Employment History
New Employment History
Employment History Help

Action	Employment History No	Organization Name	Position Title	Start Date	End Date
Edit Del	361	Acatel	Employee		
Edit Del	362	Capsilon	Software Engineer	2005-02	2005-10

Educational History
New Educational History
Educational History Help

Action	Educational History No	School Name	Degree Name	Degree Date	Major
Edit Del	152	CLS Institute of Computer Technology	Master of Computing		
Edit Del	153	Gujarat University	Bachelor of Computer Sciences		

Competency Details
New Competency Details
Competency Details Help

Figure 12: Auto Search on Candidate View

2.6.4 Create Job Applicants from Candidate View Page

- Select job(s) from the job list.
- Click "Attach candidate to the selected Job(s)" button.
- This will create a Job Applicant for the selected Job(s) and will refresh the page.
- In the reloaded page, Job Applicant related list will show the jobs that current candidate has applied to so far and selected job(s) will be removed from the job list since candidate has applied to this Job(s) now.

2.6.5 Adding Notes and Attachments

- On the Candidate View Page, go to the notes and attachments section.
- Click on New Note to add Notes.
- Click on New Attachment to add new attachments.

2.6.6 Expense Tracking

- On the Candidate View Page, go to the Expenses section.
- Click on New Expense to record new expenses related to the Candidate.

Home
Console
Accounts
Contacts/Candidates
Jobs
Candidates Search
Jobs Search
Job Applicants
Interviews
Placements
Reports
Documents
Dashboards

Parse Resume
Parse Resume

Create New...
Go!

Search
Contacts/Candidates
Go!
Limit to items I own
Advanced Search...
Recent Items
Rajneeth Kaur
Menhan I atarra

Expense Edit
New Expense

Expense Edit
Save
Save & New
Cancel

Information
Job
Type
--None--
Description
Date
[10/22/2008]
Amount
Contact/Candidate
Rajneeth Kaur
Owner
Target Recruit
Save
Save & New
Cancel

Figure 13: Expense Creation Details

2.7 Jobs

Job is a requirement for an open position, which needs to be filled up and tracked in the system.


2.7.1 Creating Jobs

2.7.1.1 Creating Manually

- Select Candidate Tab
- Click New Button
- Select Candidate Record Type
- Enter all the relevant information in the candidate creation form.
- Click Save Button

2.7.1.2 Cloning existing Jobs

- Select a Job to clone from.
- Click on the clone button to open the new job in edit mode.
- Make required changes for the new job.
- Click on Save Button.


Job Edit
New Job

[Help for this Page](#)

Job Edit

Save
Save & New
Cancel


Information
= Required Information


Owner
Target Recruit


Job Title


Billable
☒


Number of Positions

Account


Hiring Manager


Account Manager


Recruiter


Opportunity


Rating
--None--

Notify All Recruiters
☐

Notify All Vendors
☐

Number of Applicants
0

Publish
☒

EEO Job Category
--None--

AAP Job Group
--None--

Job Category
--None--

Job Term
--None--

Bill Rate Range

Overall Experience
--None--


Stage
Open

Prob of Win

Estimated Close Date
 [10/22/2008]

Expected Start Date
 [10/22/2008]

Closed
☐

Closed Qualifiers
--None--


EEO

Number of Male Applicants

Number of Female Applicants

Number of Minority Applicants

Number of Non Minority Applicants

Adverse Impact Percentage

Job Description

Job Summary


Desired Skills

Figure 14: New Job Creation Details

2.7.2 View Jobs

Jobs view page can show the complete information about the Job along with details about candidates who have been selected for the job, Interviews scheduled and Placements for the Job. It also shows the entire communication history including emails, tasks, and events.

Job Detail
[Edit](#)
[Delete](#)
[Clone](#)

Owner	TargetRecruit [Change]	Publish 	<input type="checkbox"/>
Job Num	277	Published Url	Published URL
Job Title	Product Management	Broadcast Url	Broadcast URL
Billable	<input checked="" type="checkbox"/>	EEO Job Category	
Number of Positions		AAP Job Group	
Account	Heights Technology	Job Category	Architectural
Hiring Manager	Staffing Contact	Job Term	0-3 Month Contract
Account Manager	Corporate User	Bill Rate Range	
Recruiter	TargetRecruit	Overall Experience	
Opportunity		Stage	Open
Rating		Prob of Win	
Notify All Recruiters	<input type="checkbox"/>	Estimated Close Date	
Notify All Vendors	<input type="checkbox"/>	Expected Start Date	8/17/2008
Number of Applicants	5	Closed	<input type="checkbox"/>
		Closed Qualifiers	

▼ EEO

Number of Male Applicants	Adverse Impact Percentage
Number of Female Applicants	
Number of Minority Applicants	
Number of Non Minority Applicants	

▼ Job Description

Job Summary	Covisint is a globally recognized leader of internet based collaboration solutions and services. Covisint's highly available platform provides an on-demand (SaaS) infrastructure for secure collaboration, interoperability and access to information for over 45,000 organizations worldwide. Covisint streamlines and automates business processes, connecting business communities, organizations and systems in the automotive, manufacturing, healthcare, public sector and financial services industries.
-------------	--

Job Contact Email

Job Contact Name

Internal Notes

Notes

Created By

TargetRecruit, 9/12/2008 7:01 AM

Last Modified By

TargetRecruit, 10/21/2008 6:16 AM

Candidates List

Search:

NET OR ACCE SS OR DATA WARE HOUS NG OR JAVA OR SED

Search

Count:

5

Note:

a. "All" Search Result will provide max of 100 results.

b. To perform a custom search provide the keywords separated by 'OR'.

c. Maximum of 5 keywords are allowed in the search.

Search Results

<input type="checkbox"/>	Name	Notified	skills matched	Desired Pay Type	Desired Pay	Available Date	Resume Source	Email
<input type="checkbox"/>	Anil Surabhi	<input type="checkbox"/>	3	N/A	\$0	N/A	N/A	anilsur
<input type="checkbox"/>	Edgar Jimenez	<input type="checkbox"/>	3	N/A	\$0	N/A	N/A	ijimene
<input type="checkbox"/>	RICHARD L. COLLIER	<input type="checkbox"/>	3	N/A	\$0	08/17/2008	Referral	richard
<input type="checkbox"/>	Dev Shaw	<input type="checkbox"/>	2	N/A	\$0	N/A	N/A	davsha
<input type="checkbox"/>	David Bradshaw	<input type="checkbox"/>	2	N/A	\$0	N/A	N/A	davidb
<input type="checkbox"/>	David Bradshaw	<input type="checkbox"/>	2	N/A	\$0	10/20/2008	N/A	davidb

Attach Candidate to this Job

Notify Job To Candidates

Edit

Delete

Clone

Job Applicants

New Job Applicant

Job Applicants Help

Action	Job Applicant ID	Candidate	Created By	Type	Stage	Last Activity Date	Priority	Notes
--------	------------------	-----------	------------	------	-------	--------------------	----------	-------

Figure 15: View Job Details

2.7.3 Auto Search Candidate List

It also displays the list of matching candidates based on the keywords in a job and the candidate profile. The candidate list allows taking mass actions on group of jobs for the candidate. **NOTE: Customized mass action buttons can be created based on the requirements.**

2.7.4 Send Mass Notification to Candidates

Multiple candidates can be selected for sending mass notifications to the list of suitable candidates for the Job.

- From the Candidate list, select list of candidates for notification.
- Click on the button, Send Notification.
- This will send a predefined email to all the selected candidates

2.7.5 Create Job Applicants from Job View Page

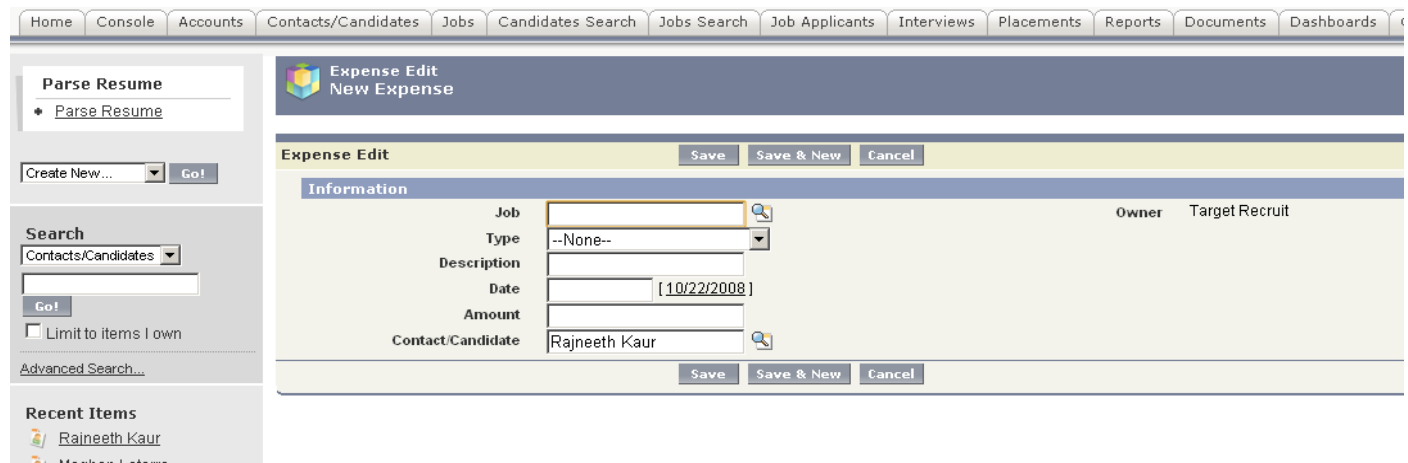
- Select Candidates(s) from the list.
- Click “Attach candidate to the selected Job(s)” button.
- This will create a Job Applicant for the selected Job(s) and will refresh the page.
- In the reloaded page, Job Applicant related list will show the Candidates that current Job has applied to so far and selected Candidates(s) will be removed from the Candidate list.

2.7.6 Adding Notes and Attachments

- On the Job View Page, go to the notes and attachments section.
- Click on New Note to add Notes.
- Click on New Attachment to add new attachments.

2.7.7 Expense Tracking

- On the Job View Page, go to the Expenses section.
- Click on New Expense to record new expenses related to the Job.



The screenshot shows the 'Expense Edit' form in the TargetRecruit application. The form is titled 'Expense Edit' and 'New Expense'. It includes a sidebar with 'Parse Resume' and 'Search' sections. The main form has fields for Job, Type, Description, Date, Amount, and Contact/Candidate. The 'Contact/Candidate' field is populated with 'Rajneeth Kaur'. The form also has 'Save', 'Save & New', and 'Cancel' buttons.

Figure 16: Expense Creation Details

2.8 Job Applicants

Job Applicant is a bridge between a Candidate and a Job allowing same Candidate to be applied for multiple Jobs and have multiple Candidates for the same Job.

2.8.1 Creating Job Applicants

2.8.1.1 Creating from Candidate View Page

- Job Applicants can be created from the Candidate Auto Search list as described in section 2.6.4.
- On Candidate View Page, Go to Job Applicant Section. Click on the New button to get the Job Applicant creation page. On this page, just add the Job number for which the Candidate is being applied for.

2.8.1.2 Creating from Job View Page

- Job Applicants can be created from the Candidate Auto Search list as described in section 2.7.5.
- On Job View Page, Go to Job Applicant Section. Click on the New button to get the Job Applicant creation page. On this page, just select the Candidate for who is being applied for this Job.

2.8.1.3 Creating from Job Applicants Tab

- Click on Job Applicants Tab.
- Click on New Button.
- On the Job Applicant creation page, select the Job number and Candidate who is being selected for the Job. There is no need to enter any more information.
- Click Save Button.

Job Applicant Edit
New Job Applicant
Help for this Page ?

Job Applicant Edit
Save
Save & New
Cancel

Information

<div style="margin-bottom: 10px;">Owner: Target Recruit</div> <div style="margin-bottom: 10px;">Account: <input type="text"/></div> <div style="margin-bottom: 10px;">Hiring Manager: <input type="text"/></div> <div style="margin-bottom: 10px;">Type: Recruiter</div> <div style="margin-bottom: 10px;">Job: <input type="text"/></div> <div style="margin-bottom: 10px;">Job Title: <input type="text"/></div> <div style="margin-bottom: 10px;">Candidate: <input type="text"/></div> <div style="margin-bottom: 10px;">Billable: <input type="checkbox"/></div> <div style="margin-bottom: 10px;">Priority: --None--</div> <div style="margin-bottom: 10px;">Stage: New Application</div> <div style="margin-bottom: 10px;">Bill Rate: <input type="text"/></div> <div style="margin-bottom: 10px;">Application Information Source: --None--</div> <div style="margin-bottom: 10px;">Availability To Interview: <input type="text"/> [10/22/2008]</div> <div style="margin-bottom: 10px;">Notice Required On Acceptance: <input type="text"/></div> <div style="margin-bottom: 10px;">Disposition Qualifiers: --None--</div> <div style="margin-bottom: 10px;">Disposition Notes: <input type="text"/></div>	<div style="margin-bottom: 10px;">Account Manager: <input type="text"/></div> <div style="margin-bottom: 10px;">Account Manager Email: <input type="text"/></div> <div style="margin-bottom: 10px;">Account Manager Phone: <input type="text"/></div> <div style="margin-bottom: 10px;">Account Manager Mobile: <input type="text"/></div> <div style="margin-bottom: 10px;">Recruiter: <input type="text"/></div> <div style="margin-bottom: 10px;">Recruiter Email: <input type="text"/></div> <div style="margin-bottom: 10px;">Recruiter Phone: <input type="text"/></div> <div style="margin-bottom: 10px;">Recruiter Mobile: <input type="text"/></div> <div style="margin-bottom: 10px;">Resume Received Date: <input type="text"/> [10/22/2008]</div> <div style="margin-bottom: 10px;">Search Name: <input type="text"/></div> <div style="margin-bottom: 10px;">Search By: <input type="text"/></div> <div style="margin-bottom: 10px;">Search Date: <input type="text"/> [10/22/2008 10:07 AM]</div> <div style="margin-bottom: 10px;">Search Criteria: <input type="text"/></div> <div style="margin-bottom: 10px;">Special Instructions: <input type="text"/></div>
--	--

Description

Notes

Figure 17: New Job Applicant Creation Details

2.8.2 View Job Applicants

Job Applicant View page displays all the details of the Candidate and Job and related information.

Job Applicant Detail		Edit Delete Clone Submit Profile With Attachments Generate Resume	
		Email Hiring Manager Schedule Interview Convert To Placement	
Information			
Owner	TargetRecruit [Change]	Account Manager	Corporate User
Job Applicant ID	152	Account Manager Email	reena.gupta@ravankia.com
Account	Hart Freeland Roberts	Account Manager Phone	(815) 000-1111
Hiring Manager	Rajeev Gupta	Account Manager Mobile	(815) 000-1111
Type	Recruiter	Recruiter	
Job	280	Recruiter Email	
Job Title	Technical Recruiter	Recruiter Phone	
Candidate	Roger Madigan	Recruiter Mobile	
Billable		Resume Received Date	
Priority		Search Name	
Stage	Submitted to Account Manager	Search By	
Bill Rate		Search Date	
Application Information Source		Search Criteria	
Availability To Interview		Special Instructions	
Notice Required On Acceptance			
Disposition Qualifiers			
Disposition Notes			
Description			
Notes			
EEO			
Job Stage		Adverse Impact Pct	
EEO Job Category		Number of Male Applicants	
AAP Job Group		Number of Female Applicants	

Figure 18: View Job Applicant Details

2.8.3 Search Criteria for Job Applicants

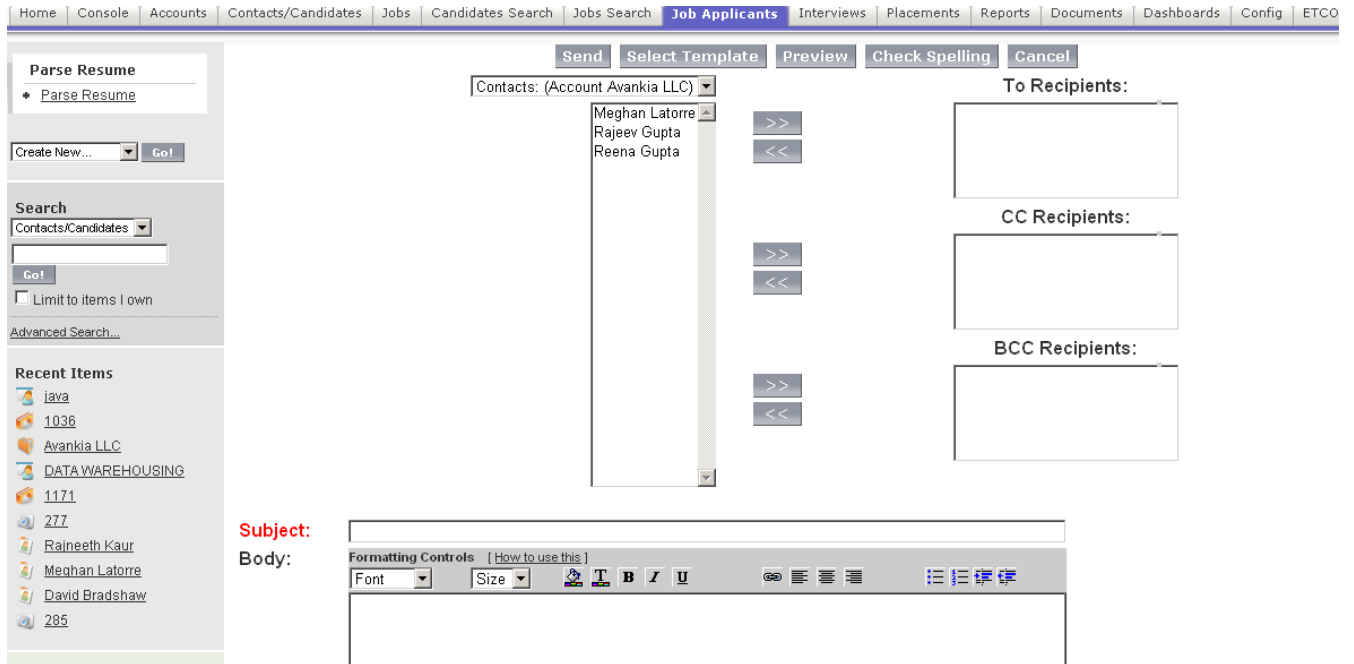
TargetRecruit keeps track of all the search criteria, search date and search by details on all the Job applicants used for searching the candidates and creating Job applicants from the search results.

2.8.4 Submit Candidates to Hiring Manager

Candidates are submitted to the hiring manager from the Job Applicant view page.

- Click on the Submit Profile with Attachment Button.
- Select the names of the people who needs to be copied on the email including the contacts in the account or the user in the company.
- It is good practice to select the email template to create the email text.
- Select files which need to be attached in the email.

- Additional files can be selected for attachment by clicking the browse button.
- Click send button to send the email.



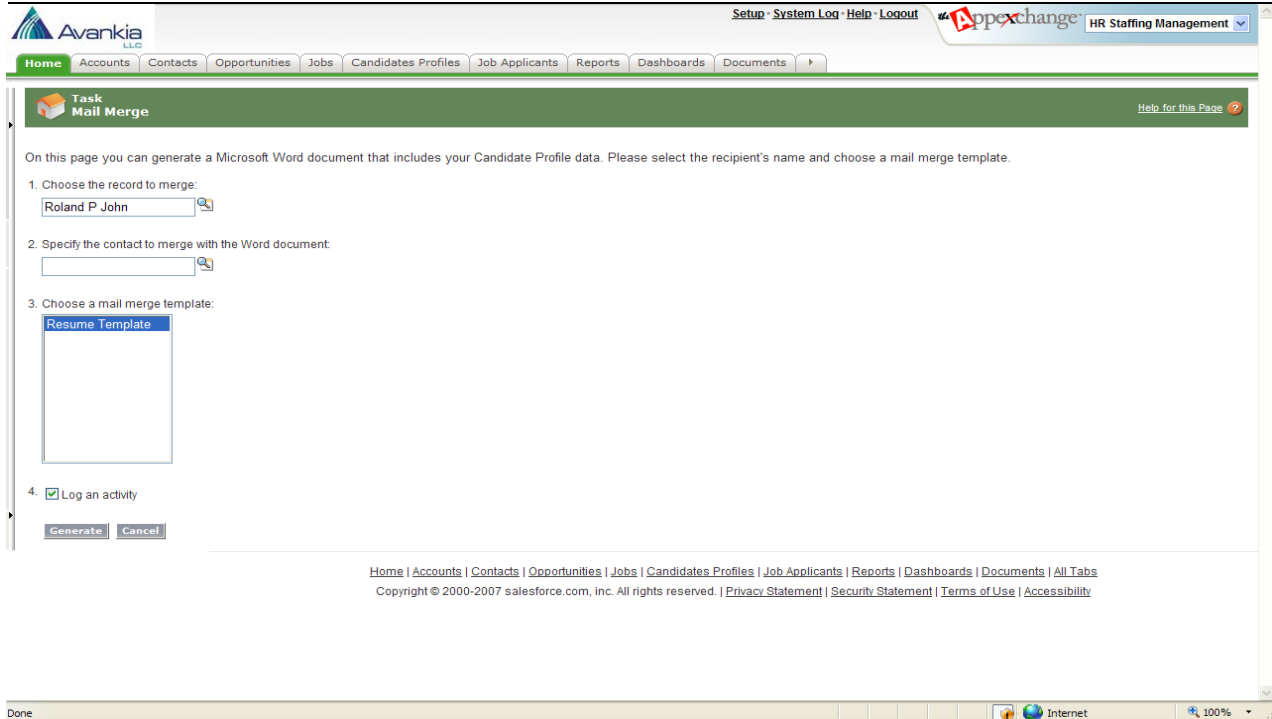
The screenshot displays the 'Job Applicants' section of the TargetRecruit application. The top navigation bar includes links for Home, Console, Accounts, Contacts/Candidates, Jobs, Candidates Search, Jobs Search, Job Applicants (active), Interviews, Placements, Reports, Documents, Dashboards, Config, and ETCO. Below the navigation bar, there are buttons for Send, Select Template, Preview, Check Spelling, and Cancel. The main area is divided into three columns. The left column contains a 'Parse Resume' section with a 'Parse Resume' button and a 'Create New...' dropdown. Below this is a 'Search' section with a 'Contacts/Candidates' dropdown and a 'Go!' button. The right column contains a 'To Recipients:' section with a text input field, a 'CC Recipients:' section with a text input field, and a 'BCC Recipients:' section with a text input field. The middle column contains a list of contacts: Meghan Latorre, Rajeev Gupta, and Reena Gupta. Below the list are three sets of '>>' and '<<' buttons. At the bottom, there is a 'Subject:' field and a 'Body:' section with a rich text editor toolbar and a text input area.

Figure 19: Submit Candidates to Hiring Manager

2.8.5 Generate Resume

Generate Resume allows to populate preformatted resume template with the Candidate details, which can be used to send the resume to the client.

- Click on Generate Resume Button.
- Select the Resume Template.
- To record the activity for resume generation, mark the checkbox as checked.
- Click on Generate button.



Task Mail Merge [Help for this Page](#)

On this page you can generate a Microsoft Word document that includes your Candidate Profile data. Please select the recipient's name and choose a mail merge template.

1. Choose the record to merge:

2. Specify the contact to merge with the Word document:

3. Choose a mail merge template:


4. ☒ Log an activity

[Home](#) | [Accounts](#) | [Contacts](#) | [Opportunities](#) | [Jobs](#) | [Candidates Profiles](#) | [Job Applicants](#) | [Reports](#) | [Dashboards](#) | [Documents](#) | [All Tabs](#)
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Figure 20: Generate Resume Details

2.8.6 Email Hiring Manager

- Keeps track of the emails sent to the hiring manager related to the specific Job Applicant.
- Click on Email Hiring Manager Button.
- Enter the email details on the email creation page. It is good practice to use email templates.
- Click Send Button.


Task
Send an Email

[Help for this Page](#)

Send

Select Template

Attach File

Check Spelling

Cancel

Edit Email

To

Meghan Latorre

Related To

Job Applicant

1036

Additional To:

CC:

BCC:

Subject

Submitting Candidate David Bradshaw for Job HR Specialist

Body

Select a Template - Google Chrome

<https://na2.salesforce.com/email/author/templateselector.jsp>

Folder

Recruiting Templates

Go!

Name	Type	Description
Candidate Termination	HTML	Sending email when candidate
Email for New Placement	HTML	Email for New Placement with E
Interview Change	HTML	Interview Change Template
Interview Reminder	HTML	Interview Reminder
Interview Scheduled Mail (To AccountManager)	HTML	Interview Scheduled Mail
Interview Scheduled Mail (To Administrators)	HTML	Interview Scheduled Mail to Adrr
Interview Scheduled Mail (To Candidate)	HTML	Interview Scheduled Mail

Send

Select Template

Attach File


Check Spelling

Cancel

Figure 21: Email Hiring Manager

2.8.7 Schedule Interview

- Interview can be scheduled for Candidate with the client.
- Keeps track of all the information for the interviews.
- Click on the Schedule Interview Button.
- Enter all the details for the interview.
- Click on Save Button.


Interview Edit
389

[Help for this page](#)

Interview Edit

Information
! = Required Information

Interview ID	389	Job Applicant	1036
Type Of Interview	--None--	Rating	--None--
Length of Interview (Minutes)		Job Title	HR Specialist
Interview Time	[10/22/2008 12:06 PM]	Candidate	David Bradshaw
Account	Avankia LLC	Candidate Phone	(615) 243-0743
Job Num	1602	Candidate Email	davidbradshaw57@yahoo.
Recruiter			
Assigned Recruiter	Target Recruit		
Assigned Recruiter Email	sunil.nautiyal@avankia.co		

Related Information


Interviewing Person	Meghan Latorre	Interviewing Person Email	reena.gupta@avankia.com
Account Manager	Target Recruit	Account Manager Email	sunil.nautiyal@avankia.co
Special Instructions to Candidate			

Interview Feedback

Figure 22: Interview Details

2.8.8 Create Placement

- When the Candidate is Hired or placed at the client's Job then the Job Applicant needs to be converted to Placement.
- Keeps track of all the information for the Placements.
- Click on Convert to Placement Button.
- Enter all the details for the Placement.
- Click Save Button.


Placement
P00000149

[Printable View](#) | [Customize Page](#) | [Help for this Page](#)

[Add Tags](#)

[« Back to List: Email Services](#)

Placement Detail
[Edit](#)
[Delete](#)
[Clone](#)

Owner	TargetRecruit [Change]	Recruiter	
Job Applicant	1036	Recruiter Email	
Placement ID	P00000149	Account Manager	TargetRecruit
Candidate	David Bradshaw	Account Manager Email	sunil.nautival@avankia.com
Job Num	1602	Assigned Recruiter Email	sunil.nautival@avankia.com
Job Title	HR Specialist	Assigned Recruiter	TargetRecruit
Account	Avankia LLC	Date Accepted	
Hiring Manager	Meghan Latorre	Start Date	10/7/2008
Type		End Date	12/31/2008
SOW Contract Date		Terminated	<input type="checkbox"/>
No. Of Days Taken	0	Terminated Reason	

Payment Details

Bill Rate	90	Payment Terms	
Pay Rate	50	Net Margin	25.00
Discount		Placement Rating	★★★★★
Pay Type	W-2 w/benefits		
Sign on Bonus			
Created By	TargetRecruit , 10/7/2008 8:35 AM	Last Modified By	TargetRecruit , 10/14/2008 11:51 PM

[Edit](#)
[Delete](#)
[Clone](#)

Open Activities
[New Task](#)
[New Event](#)

[Open Activities Help](#)

No records to display

Figure 23: Placement Details

2.9 Interviews

Refer to section 2.8.7.

NOTE: A new Interview can only be created from the Job Applicant record and not directly from the Interview page.

2.10 Placements

Refer to section 2.8.8.

NOTE: A new Placement can only be created from the Job Applicant record and not directly from the Placement page.

2.11 Candidate Search

Candidate Search allows doing extensive customized search for the Candidates. Searches can be saved and can be viewed at a later time and it shows refreshed data each time.

- Click on Candidate Search Tab. It displays list of saved searches and a New button to create new searches.
- Click on the Search Name to view the existing search results.
- Click on the New Button to create new searches.
- Enter Search Keywords in Textbox. Boolean search criteria can be used as well.
- Create additional search criteria by selecting values in the drop downs in the Additional Criteria section. It displays all the data elements that can be searched on for the Candidate.
- Select the list of fields to be displayed for the Search result.

- Select the sorting order for search result.
- Click on the Search Button to run the search and give the search results.
- Click on Save Button to first save the search and give the search results.
- Once the Search Results are displayed, select the candidate to either notify them about a Job or make them Job Applicant. Job can be selected from the drop down next to the buttons.
- NOTE: Customized action buttons can be created as needed.

QuickSearch ! = Required Information

Additional Criteria

Filter By Fields	Field Operator	Value
1 None	none	
2 None	none	
3 None	none	
4 None	none	
5 None	none	

Select Display Columns

Availability To Interview
 Background Check
 Birthdate
 Business Fax
 Business Phone
 Candidate Status
 Contact/Candidate Description
 Current Pay
 Desired Pay Type
 Desired Pay

>>
 <<

Full Name
 Gender
 Email
 Available To Start
 Mailing City
 Time Zone

Select Sort Order

Primary	None	ascending
Secondary	None	ascending
Tertiary	None	ascending

Search Name

Search Query

Figure 24: Candidate Search Details

Select Display Columns

Availability To Interview
 Background Check
 Birthdate
 Business Fax
 Business Phone
 Candidate Status
 Contact/Candidate Description
 Current Pay
 Desired Pay Type
 Desired Pay

>>

 <<

Full Name
 Gender
 Email
 Available To Start
 Mailing City
 Time Zone

Select Sort Order

Primary: None ascending
 Secondary: None ascending
 Tertiary: None ascending

Search Name

Search Query: DATA WAREHOUSING

Search Save Clone Cancel

Select Job: None
Notify Job to Candidates Add candidates to Job

<input type="checkbox"/> All	Full Name	Gender	Email	Available To Start	Mailing City	Time Zone
<input type="checkbox"/>	Rajneeth Kaur		rkaur@alk.com			
<input type="checkbox"/>	Vijay Kumar		vji@ad.com			

Figure 25: Candidate Search Results

2.12 Job Search

Job Search allows doing extensive customized search for the Jobs. Searches can be saved and can be viewed at a later time and it shows refreshed data each time.

- Click on Job Search Tab. It displays list of saved searches and a New button to create new searches.
- Click on the Search Name to view the existing search results.
- Click on the New Button to create new searches.
- Enter Search Keywords in Textbox. Boolean search criteria can be used as well.
- Create additional search criteria by selecting values in the drop downs in the Additional Criteria section. It displays all the data elements that can be searched on for the Candidate.
- Select the list of fields to be displayed for the Search result.
- Select the sorting order for search result.
- Click on the Search Button to run the search and give the search results.
- Click on Save Button to first save the search and give the search results.
- NOTE: Customized action buttons can be created as needed.

QuickSearch

= Required Information

Oracle

Additional Criteria

Filter By Fields	Field Operator	Value	
1 None	none		AND
2 None	none		AND
3 None	none		AND
4 None	none		AND
5 None	none		

Select Display Columns

AAP Job Group
Adverse Impact Percentage
Bill Rate Range
Billable
City
Closed Qualifiers
Closed
Country
Department
Desired Skills

>>

Job Title
Job Num
Job Time Zone

<<

Select Sort Order

Primary	None	ascending
Secondary	None	ascending
Tertiary	None	ascending

Search Name

Search Query Oracle Jobs

SearchSaveCloneCancel

Figure 26: Job Search Details

1	None	none		AND
2	None	none		AND
3	None	none		AND
4	None	none		AND
5	None	none		

Select Display Columns

- AAP Job Group
- Adverse Impact Percentage
- Bill Rate Range
- Billable
- City
- Closed Qualifiers
- Closed
- Country
- Department
- Desired Skills

>>

<<

- Job Num
- Job Title
- Job Term
- Job Time Zone
- Job Level

Select Sort Order

Primary	None	ascending
Secondary	None	ascending
Tertiary	None	ascending

Search Name

Search Query	DATA WAREHOUSING
--------------	------------------

Search

Save

Clone

Cancel


<input type="checkbox"/> All	Job Num	Job Title	Job Term	Job Time Zone	Job Level
<input type="checkbox"/>	277	Product Management	0-3 Month Contract	-CST	Student (undergraduate/graduate) 10

Figure 27: Job Search Results

2.13 Config

Config is used to define the Keywords, which is automatically populated for the Candidate and Jobs. Those keywords are used in auto match of the Candidates and Jobs and displays in the Candidate and Job view page as explained earlier. To make changes to the keywords, use the following steps:

- Click on Config tab.
- Click on Config Id 0000.
- Edit and make changes in the Keywords. NOTE: Each keyword should be in caps separated by semicolon.


Config Edit
0000

Config Edit

Information

Config Id	0000	Owner	Target Recruit
Name	<input style="width: 100%;" type="text" value="Skillset"/>		
Value	<div style="border: 1px solid #0070C0; padding: 2px;"> <div style="display: flex; justify-content: space-between;"> <div style="flex-grow: 1;"> SALESFORCE.COM;NET;A+;AB INITIO;ACCESS;ACTIVE DIRECTORY;ADO;ADO.NET;ADOBE ILLUSTRATOR;ADOBE PHOTOSHOP;AGILE;AIX;AJAX;APAC HE;ARCHITECT;AS400;ASP;ASP.NET;BAAN;BACKUP & RECOVERY;BGP;BOARD DESIGN;BOARD LEVEL DESIGN;BORLAND C++;BUSINESS </div> <div style="width: 20px; text-align: center;"> ▲ ▼ </div> </div> </div>		

Figure 28: Keyword Configuration Details

2.14 Documents

Documents tab can be used as a central repository for storing shared documents to be easily accessible by the users if they have access rights to the document. For more details, please refer to online Help and Training link.

2.15 Reports

TargetRecruit comes with many pre-built Reports. Any custom reports can be created in the system by clicking on Create New custom report button in the Reports Tab. For more information on creating reports, refer to the online Help and Training links.

[All Reports](#)
[Recent Reports](#)
Reorder Folders | Collapse All | Expand All

Create New Custom Report

Account and Job Reports

[Edit](#) | [Del](#) | [Export](#)

Accounts with Rating

[Edit](#) | [Del](#) | [Export](#)

Contact List By Accounts

[Edit](#) | [Del](#) | [Export](#)

Contact Mailing List

[Edit](#) | [Del](#) | [Export](#)

Email Status Report

[Edit](#) | [Del](#) | [Export](#)

Jobs By Account

[Edit](#) | [Del](#) | [Export](#)

Jobs By Stage

[Edit](#) | [Del](#) | [Export](#)

Num of Positions by Job and by Account

[Edit](#) | [Del](#) | [Export](#)

Contact/Candidate Reports

[Edit](#) | [Del](#) | [Export](#)

Active Candidate by Skillset

[Edit](#) | [Del](#) | [Export](#)

Active Candidates Statewise

[Edit](#) | [Del](#) | [Export](#)

Candidate List

[Edit](#) | [Del](#) | [Export](#)

Candidate Pipeline

[Edit](#) | [Del](#) | [Export](#)

Competency Search

[Edit](#) | [Del](#) | [Export](#)

My Active .Net Candidates

[Edit](#) | [Del](#) | [Export](#)

Job

[Edit](#) | [Del](#) | [Export](#)

Jobs By Account Manager

[Edit](#) | [Del](#) | [Export](#)

Jobs By Recruiter

[Edit](#) | [Del](#) | [Export](#)

Candidate Reports

[Edit](#) | [Del](#) | [Export](#)

Candidates by SkillSet

[Edit](#) | [Del](#) | [Export](#)

Candidates by State

[Edit](#) | [Del](#) | [Export](#)

My Oracle Candidates

[Edit](#) | [Del](#) | [Export](#)

Job Applicant Reports

[Edit](#) | [Del](#) | [Export](#)

Activity by Job Applicant

[Edit](#) | [Del](#) | [Export](#)

Applicants By Job

[Edit](#) | [Del](#) | [Export](#)

Job Applicant by Stage

[Edit](#) | [Del](#) | [Export](#)

Open Jobs with no Applicants

[Edit](#) | [Del](#) | [Export](#)

Account Manager

[Edit](#) | [Del](#) | [Export](#)

My Interviews

[Edit](#) | [Del](#) | [Export](#)

My Open Jobs by Account

[Edit](#) | [Del](#) | [Export](#)

Figure 29: Pre Built Reports

2.16 Dashboards

TargetRecruit comes with many pre-built Dashboards. Any custom Dashboard can be created in the system by clicking on Edit button in the Dashboards Tab. For more information on creating Dashboards, refer to the online Help and Training links.

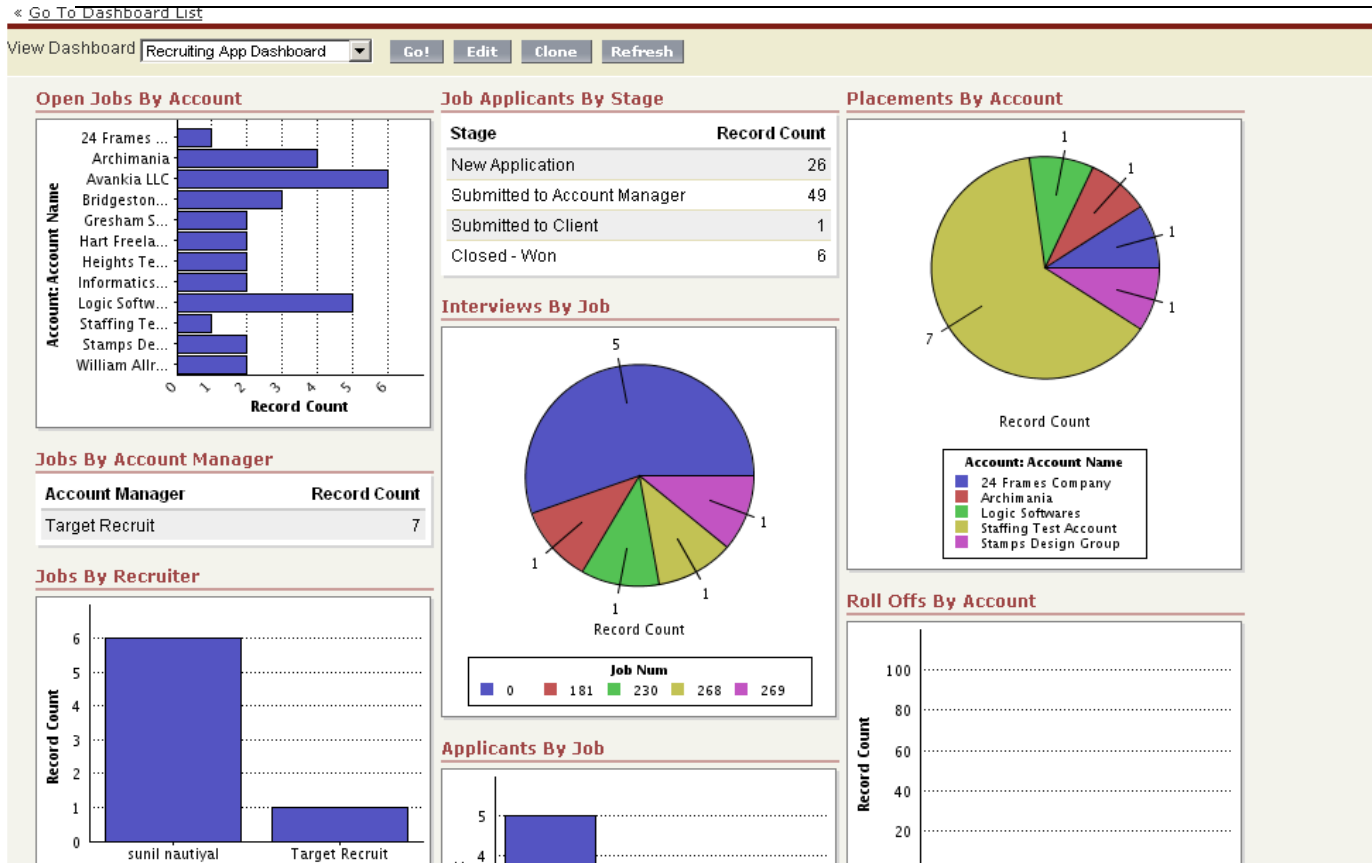


Figure 30: Pre Built Dashboards

2.17 Templates

2.17.1 Email Templates

Email templates are used in sending individual emails or mass emails.

TargetRecruit comes with several predefined email templates, which can be edited as needed. For more information on managing email templates, please visit online help and training links.

New Template						
Action	Email Template Name	Template Type	Available For Use	Description	Owner	Last Modified Date
Edit Del New	Candidate Termination	HTML	✓	Sending email when candidate gets terminated	TRecr	9/22/2008
Edit Del New	Email for New Placement	HTML	✓	Email for New Placement with Sound track	TRecr	7/30/2008
Edit Del New	Interview Change	HTML	✓	Interview Change Template	TRecr	7/30/2008
Edit Del New	Interview Reminder	HTML	✓	Interview Reminder	TRecr	7/30/2008
Edit Del New	Interview Scheduled Mail (To AccountManager)	HTML	✓	Interview Scheduled Mail	TRecr	7/30/2008
Edit Del New	Interview Scheduled Mail (To Administrators)	HTML	✓	Interview Scheduled Mail to Administrators	TRecr	7/30/2008
Edit Del New	Interview Scheduled Mail (To Candidate)	HTML	✓	Interview Scheduled Mail	TRecr	7/30/2008
Edit Del New	Interview Scheduled Mail (To Recruiter)	HTML	✓	Interview Scheduled Mail	TRecr	7/30/2008
Edit Del New	Interview Set up	Text	✓		TRecr	7/30/2008
Edit Del New	Job Closed Mail to Recruiter	HTML	✓	Mail to Recruiter when job closed	TRecr	7/30/2008
Edit Del New	Job Information	HTML	✓		TRecr	7/30/2008
Edit Del New	New Job Notification	Text	✓	Notification to Recruiter about new job	TRecr	7/30/2008
Edit Del New	New Online Job Applicant Notification	Text	✓	New Online Job Applicant	TRecr	7/30/2008
Edit Del New	New Placement Notification (All Users)	HTML	✓	This is a new placement notification mail for all users.	TRecr	7/30/2008
Edit Del New	New Recruiter Assigned	Text	✓		TRecr	7/30/2008
Edit Del New	Notification to Recruiter for Online submission	HTML	✓	Notification to Recruiter for Online submission	TRecr	7/30/2008
Edit Del New	Notification to Recruiter on Rejection	HTML	✓	Notification to Recruiter on Rejection	TRecr	7/30/2008
Edit Del New	Notify Job To Candidates	HTML	✓	Notify Job To Candidates	TRecr	7/30/2008
Edit Del New	Placement Done	Text	✓	Email Alert to everyone in the company for successful placement	TRecr	7/30/2008
Edit Del New	Placement Rate Change Notification Mail (Account Manager)	HTML	✓	This template is used for Placement Rate Change Notification (Account Manager)	TRecr	9/22/2008

Figure 31: Pre Built Email Templates

2.17.2 Mail Merge Templates

Mail Merge templates are used for creating MS Word or Excel documents, which can be populated using the details from different objects. Most common use of Mail Merge documents are creating resumes templates, Work orders, contracts, etc.

TargetRecruit comes with several predefined mail merge templates, which can be edited as needed. For more information on managing mail merge templates, please visit online help and training links.

Mail Merge Templates

Help for this Page ?

Mail merge templates are Microsoft Word documents with merge fields that reference Salesforce fields. Sample templates are available for download in the online help. Click New Template to upload a new mail merge template.

New Template

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Action	Name	Description	Filename	Size	Created By Alias	Created Date
Edit Del Preview	Resume Template		Resume_Template.doc	59KB	TRecr	8/1/2008

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Figure 32: Pre Built Mail Merge Templates

2.17.3 Letterheads

Letterheads can be used in creating email templates. For more information on creating Letterheads, please visit the online help and training links.

2.18 Workflows

Workflows are used to automate standard processes by configuring workflow rules. TargetRecruit comes with several predefined workflow rules, which can be edited as needed. For more information on managing Workflow rules, please visit online help and training links.

Workflow automates the following types of actions:

- Email Alerts - Send an email to one or more specified recipients. For example, use workflow rules to automatically send recruiter an email when a Job is assigned to the recruiter.
- Tasks - Assign a new task to a user, role, or record owner. For example, automatically assign follow-up tasks to the account manager to review the Job Applicant created by the recruiter.
- Field Updates - Update the value of a field on a record. For example, automatically change the status of the Candidate as available when his placement contract is terminated.
- Outbound Messages - Send a secure configurable API message (in XML format) to a designated listener. For example, automatically send the Job creation details for Job publishing website.

New Rule				
Action	Rule Name	Description	Object	Active
Edit Del Deactivate	EmailToCandidate Submission		ETCObject	<input checked="" type="checkbox"/>
Edit Deactivate	Interview Schedule Notification Email	A Mail is sent to Recruiter, Account Manager and Candidate when the interview is scheduled.	Interview	<input checked="" type="checkbox"/>
Edit Deactivate	Interview Set Up		Interview	<input checked="" type="checkbox"/>
Edit Deactivate	Job Applicant created By Recruiter	When Job Applicant is created, create a task for an account manager to send resume to the hiring manager	Job Applicant	<input checked="" type="checkbox"/>
Edit Deactivate	Job Create Notification to Recruiter and Account Manager	New Job created in the System	Job	<input checked="" type="checkbox"/>
Edit Activate	Job Create OR Update	Used for publishing jobs	Job	<input type="checkbox"/>
Edit Del Deactivate	Job Creates OR Updates	Used for publishing jobs	Job	<input checked="" type="checkbox"/>
Edit Activate	Job Applicant Stage change	Job Applicant Stage changes	Job Applicant	<input type="checkbox"/>
Edit Deactivate	New Online Job Applicant	New Online Job Applicant - Notify Recruiter	Job Applicant	<input checked="" type="checkbox"/>
Edit Deactivate	Notification on Interview Change	This rule sends mail on change of Interview	Interview	<input checked="" type="checkbox"/>
Edit Deactivate	Notification on Placement Done	Whenever a placement is done - email alert for everyone in the company	Placement	<input checked="" type="checkbox"/>
Edit Deactivate	Notification on Placement Termination	This notifies the termination of the placement to Account Manager and Recruiter	Placement	<input checked="" type="checkbox"/>
Edit Deactivate	Notification to all recruiters on new job created	Notify all recruiters for new job created, if "Notify All Recruiters" is checked	Job	<input checked="" type="checkbox"/>
Edit Deactivate	Notification to Recruiter on Job Applicant Rejection	Notification to Recruiter on Job Applicant Rejection	Job Applicant	<input checked="" type="checkbox"/>
Edit Deactivate	Rate Change Notification	Rate Change Notification	Placement	<input checked="" type="checkbox"/>
Edit Deactivate	Recruiter changed for a job	When recruiter is changed for a particular job then mail generates to the new recruiter	Job	<input checked="" type="checkbox"/>
Edit Deactivate	SetEOODate		Job Applicant	<input checked="" type="checkbox"/>
Edit Del Activate	Test		Opportunity	<input type="checkbox"/>

Figure 33: Pre Built Workflow Rules

2.19 Additional Customizations

Additional Customizations can be done by the Administrator using the Setup link. For more information on customization, please visit the [online help](#) and [training links](#).