

Overview of the Online Help System

This document contains three articles that describe the purpose and features of the company's online help system. These articles summarize some of the conventions used throughout the help system, how to navigate the information within, and additional support resources.

These articles ultimately were published to the company's web-based platform in HTML format.

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About Help

This help system is the official “system of record” that contains documentation for how to use all platform features. If you have an account to access the web-based application, you can open the help system and see that all articles.

Audiences

Most platform features are used by recruiters, hiring managers, and other people involved on a daily basis in the talent management process. But there are also other users who are responsible for managing the platform and configuring its features. Many of the articles intended for these more advanced users are marked with the "Admin article" tag.

Level of Detail

Since the platform is highly configurable to meet the needs of each customer, it is not possible for the help system to reflect how each customer has set it up. Therefore, these articles must remain somewhat general in order to best describe the platform’s features for everyone. Some examples:

- Integrations let your organization connect data in this platform to third-party systems. Because many configuration possibilities exist, the articles describing how to configure and use each integration cover the most common use cases.
- Your organization created custom names for the steps that records follow in a workflow. The help system is not able to reflect such custom names for every customer, so articles use more general language when instructing you to “move the record to the step that triggers the integration,” for example.
- “Objects” is a collective term used to refer to the different record types your organization can create to manage its processes and activities, such as projects, support requests, or training courses. It would be difficult to reflect all the custom record type names that customers can create, so help articles use the term “object records” instead.

If you have any questions about the specific way your organization has configured the platform, contact your admin.

Access and Use the Features You Read About

Help articles are visible to all users. Therefore, you may read about features that you are unable to access in the platform. There could be a couple reasons for this:

- **Solutions Purchased.** The platform offers many solutions for finding and attracting talent. Although the help system documents all solutions, your organization may have

only purchased a subset of those solutions. If you read about a feature you would like to add to the platform, contact your admin.

- **Permissions.** Access to each feature is managed by granting you specific permissions associated with your role on the platform. Even if your organization purchased a solution, you still may not be able to access a feature if you do not have the necessary permissions.

Accessibility

We work hard to make our documentation complete, clear, and accessible to everyone by following the WCAG 2.1 AA accessibility standard. Help articles often use subheadings to organize the content for easier scanability and comprehension, and wherever we use images to support the documentation, we use alternative text.

For more information about our accessibility efforts, please see our [accessibility statement](#).

How to Use Help

Access the help system from the application's top bar, either through the main menu or the user menu.

Navigating Help

On the left is an expandable table of contents organized into categories, subcategories, and individual articles. You can also use the search bar to find articles based on keywords you type. Click an article's title in the table of contents (or the search results) to open that article in the main content area.

In the table of contents, help articles are organized by features and the tasks you perform, not by the solution name that your organization has implemented. For example, you won't see categories for {Solution Name 1} or {Solution Name 2}, but you will see categories for creating records, working with lists, using forms or portals, and more.

Types of Articles

There are a handful of different types of help articles. Each serves a different purpose:

- **About articles** introduce a feature and summarize its capabilities, prerequisites, and how it interacts with other features across the platform. They normally appear as the first article in each subcategory and also give important context for other information that subcategory contains.
- **Tour articles** orient you to the layout of more complex screens, such as describing the anatomy of a standard list or the platform's calendar. These articles include an annotated image that highlights important sections or tools. A numbered list below the image explains each annotation.
- **Placeholder articles** briefly summarize a feature and then link to another article where that feature is covered in detail. These articles often are used to describe how a feature relates to other features, but those other features are documented elsewhere.
- **Instructional articles** give step-by-step directions for how to configure or use a feature. These articles have a paragraph format instead of numbered steps to better explain the different ways a feature can be configured.

Images

Screen captures and other visual aids are used in the online help system. Because the platform is highly configurable to the needs of each customer, screens may not look identical for everyone. For this reason, images are used only when necessary to help illustrate a complex feature or process.

Special Formatting

Some texts in the application change depending on how your organization has configured the platform. When you create a new form by copying an existing form, for example, a new page appears titled “Copy of [*form name*].” Brackets and italics are used in the help system to represent texts that can change based on the action you are performing, such as the title of the original form.

Submit Feedback

If you are unable to find the information you're looking for in the online help system, or if you feel an article could be improved, submit your feedback using the section at the bottom of each article. The more detailed the information you provide about the issue, the better it helps to improve the documentation.

If you need immediate assistance for something you cannot find in the help system, consider one of our other support resources.

Other Support Resources

Because you can access the help system directly from within the platform, it is often the most efficient means to find answers to your questions. If you are unable to find the answers you need, there are other resources at your disposal.

News

Every two weeks, we release new features and enhancements to the platform. You can find announcements in the news articles we post to the platform's News page.

Technical Support

{Company Name} does not use third-party support organizations. Instead, we maintain our own Technical Support team staffed with specialists who have a deep functional knowledge of the platform and its tools, and who are closely connected with additional technical experts who can resolve any issues quickly.

You can contact the Technical Support team and submit your issue using the online Customer Portal. You can also contact them via email at support@company.com or by phone.

USA & Canada	+1 800 555 1212
EMEA	+44 555 654 1212
Latin America	+54 62 555 1212

Training

Training Portal

{Company Name} has a standard training program that we deliver virtually, and at no extra cost. Customers can access all available resources through our online Training Portal as often as they need.

Interactive Training

Complement your training with this hands-on, guided environment that lets you practice what you've learned. Click [here](#) for more information.

Custom Training

At an extra cost, {Company Name} can partner with you to create custom training materials that teach your users how to use the platform within the context of your specific business processes. We also offer a certification program where you can become a subject matter expert in the platform's advanced features.

Visit our [web site](#) for complete information about our training offerings.

Your Organization's Admin

When your organization implemented the {Company Name} platform, one or more of your coworkers were identified as platform administrators. Admins are advanced users who often are responsible for maintaining the platform and configuring its tools. Contact your admin if you have questions about which features are available for your organization and the permissions necessary to access them. Admins also have direct access to your organization's {Company Name} account manager for additional assistance.