Administrator Guide

Position Manager 11

Effective 4/9/2018

Contents

System Administration

System-wide settings in Position Manager are controlled from the pages accessible from the **Admin** item in the navigation bar. Options found in these areas allow global configuration of the system to meet organizational needs.

> **Warning:** Changes made to system-wide settings impact all users, so always take caution when updating these options.

The **Admin** area in the navigation bar contains most of the areas for system-wide configuration settings. Several categories reside under **Admin**, each with a set of sub-pages:

Content

- Announcements. Announcements are messages that appear on the Dashboard. They can be used to notify users of upcoming events or display important messages regarding your company.
- Communication Templates. Communication Templates are email and document templates for notifications sent to applicants directly from the Position Manager system.
- Fields. Provides an area to add, remove and edit Fields used to collect and display data in the system.
- Job Templates. Predefined templates for job postings that can be used to speed the requisition definition process.
- Questionnaires. Questionnaires are used in Position Manager during the application process to gather specific information from potential candidates for job openings. This page provides an area to define pre-application questions for applicants.

Career Site

- Acknowledgment Text. Acknowledgments are used during the apply process on your career sites. The message is presented to applicants and usually constitutes a verification of terms and conditions of their application.
- Application Status Messages. Application Status Messages are displayed to applicants when they request an update on a submitted application for a job posting. This area allows you to edit the description of the available application statuses that is displayed to applicants.
- Apply Limits. Options found using this link control how many applications can be submitted from a job seeker for various requisitions, position titles, job codes, etc.
- Web Messages. Web Messages appear on the job website as notifications to visitors to the site. This link provides an area to add and edit these messages.

Onboarding

- Documents. Determines which documents are available to send to applicants during the hiring process.

- Document Groups. Document Groups are used to provide pre-selected groups of available documents when onboarding a hired applicant in Position Manager. This page provides an area to create and edit document groups used during the onboarding process.
- Welcome Messages. Welcome messages are displayed to applicants that have been selected for hire. These messages are displayed on the **New Hire** tab on the career site.

Organization

- Hierarchy. Allows administrators to manage the hierarchy of organizations within their system.
- Users. Where administrators are able to manage users of the system.
- User Roles. Controls permissions for users in the system.
- Settings. The *Settings* page allows system administrators to control many aspects of user interaction with the Position Manager system.

Career Site

Acknowledgement Text

Acknowledgements are messages displayed to applicants as they apply for positions through your career site. They usually consist of a description of the terms and conditions for submitting their application.

The main *Acknowledgements* page provides a table view of messages in the system.

This table displays basic information for messages used on your career site and allows you to perform actions on multiple messages at once. Clicking the link under the "Name" column will take you to the *Acknowledgement Detail* page for the selected item.

The table can be filtered using the **Search** panel to the left of the page.

There are three types of acknowledgement messages:

- **General**. The General type allows for custom terms and conditions to be included in the acknowledgement. It requires applicants to accept the acknowledgement (with a checkbox) and provide a digital "signature" (type in their name) in order to continue the application process.
- **FCRA**. Fair Credit Reporting Act. This message type also requires an acceptance and signature in order to continue the application process.
- **Read Only**. The Read Only type simply displays text to the applicant. No acceptance or signature is required to continue the application process.

There can only be one of each type of acknowledgement message for each career site.

Career Site Settings: Acknowledgement Text Detail

The *Acknowledgement Detail* page allows you to adjust the options and settings for your messages that are used on the career site.

There are several options available for each message in the system.

- **Name**. The name of the message. This will not be displayed on the site and is for reference purposes only.
- **Type**. Indicates the type of the acknowledgement message.
- **State**. This field indicates the states of the message. There are three possible state entries:
  - **Draft**. Message has not yet been placed on any career site. Draft messages can be edited at a later date.
  - **Live**. Message is currently being used on a career site. You cannot edit a Live message.
  - **Published**. Message had been used on a career site, but has since been removed. You cannot edit a Published message.
- **Career Site**. This is the career site that the message will be used on.
- **Text**. This is the actual body of the message. There are several formatting options available using the toolbars above the text area.

Adding an Acknowledgement

You can add a new acknowledgement message to a career site at any time. New messages are automatically assigned to a state of "Draft" until they are published to a site.

1. From the main *Acknowledgements* page, click the **Add Acknowledgement** button above the table. A pop-up window opens asking you to select an acknowledgement type.
2. Select an acknowledgement type from the drop-down list. The pop-up window closes and the *Acknowledgement Detail* page opens.
3. Type in a **Name** for the message. This is an identifier for the message and is not displayed to users.
4. Select a **Career Site** from the drop-down list.
5. Type in the **Text**, using the text formatting tools available above the text box.
6. When you have finished setting all necessary options, click the **Save** button at the bottom of the page.

After the **Save** button is clicked, the page reloads and displays a message stating the message has been saved.

You can now use the message on selected sites using the *Publish Acknowledgement* option in the **Take Action** drop-down list.

Editing an Acknowledgement

Acknowledgements can be updated if they are in a "Draft" state. In order to update a message in a "Live" state, you will need to create a new message.

You cannot edit a message in a "Live" state.

1. From the main *Acknowledgements* page, locate the message you wish to update from the list. You can either search for a specific message or browse all available messages in the table.
2. Click the link for the message under the "Name" column. This will open the *Acknowledgement Detail* page.
3. Make the necessary updates to the available message options.

4. When you have finished entering the necessary information for the message, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the message was successfully saved.

Application Status Messages

Application Status Messages are displayed to applicants when they request an update on the status of a submitted application to a job posting on both internal and external job boards. A different message can be displayed for each available application status in Position Manager.

The main *Application Status Messages* page displays the career sites where you are able to customize application status messages.

The two sites are:

- **Career Site**. These messages are presented to current employees that are applying for a different position within your organization.
- **Career Site External**. These messages are presented to applicants from outside your organization when requesting a status update.

Clicking the link under the "Career Site" column opens the *Application Status Message Detail* page for the selected workflow, where you can make necessary edits to the available messages.

Application Status Messages Detail

The *Application Status Messages Detail* page allows you to edit the messages displayed to applicants when requesting a status update on submitted applications.

The *Application Status Messages Detail* page lists the available application statuses along with a text box that displays the message to be provided to applicants when requesting an update. These messages can be edited simply by updating the text in the desired text box under the "Messages" column.

Status	Message
New	Thank You for applying. Your application has been received and it will be reviewed.
Active - Reviewed	Your Application is being reviewed. If you are among those who best meet the requirements for this position you will be contacted for an interview. It is not necessary for you to call or to apply again.
Active - Phone Screen	Your Application is being reviewed. If you are among those who best meet the requirements for this position you will be contacted for an interview. It is not necessary for you to call or to apply again.
Active - Sent to Manager	Your Application is being reviewed. If you are among those who best meet the requirements for this position you will be contacted for an interview. It is not necessary for you to call or to apply again.
Active - Interview	Your Application is being reviewed. If you are among those who best meet the requirements for this position you will be contacted for an interview. It is not necessary for you to call or to apply again.
Active - Check References	Your Application is being reviewed. If you are among those who best meet the requirements for this position you will be contacted for an interview. It is not necessary for you to call or to apply again.
Active - Background Check	Your Application is being reviewed. If you are among those who best meet the requirements for this position you will be contacted for an interview. It is not necessary for you to call or to apply again.
Active - Offer	Your Application is being reviewed. If you are among those who best meet the requirements for this position you will be contacted for an interview. It is not necessary for you to call or to apply again.
File - Hired	Congratulations You have been recommended for Hire!
File - Not Hired	Thank You for your patience during this review process. You have not been selected for this position. Good luck with your search for employment.
	☑ Check to display external disposition to applicant along with status.
File - Not Hired - Viable	While You have not been selected for this position. Your application is being further reviewed for consideration of other positions. It is not necessary to call or to apply again. We will contact you if a match is determined for your skills and experience.
	☑ Check to display external disposition to applicant along with status.

For the "File - Not Hired" and "File - Not Hired - Viable" statuses, there is an additional option to display the external disposition reason to the applicant along with the general application status update.

Editing Application Status Messages

Application Status Messages can be updated at any time. Changes are immediately reflected on the selected career site the next time an application requests a status update.

These steps take place from the *Application Status Messages Detail* page.

1. Locate the status you want to update.
2. Make the necessary edits to the status message in the available text box.

3. When finished making edits, click the **Save** button.

Clicking the **Save** button saves the edits to the system. The new status message(s) are displayed to applicants the next time a status update is requested.

Apply Limits

The *Apply Limits* page allows you to control how many applications are received from individual job seekers based on requisition numbers, position titles, job codes, etc.

There are several options available on the *Apply Limits* page. Each setting allows you to set the number of applications to limit seekers to. The **Applicable Statuses** drop-down list found on all options allows you to select multiple statuses to base the limitation upon.

> **Example:** You can determine that the number of applications allowed only applies to those applications with a status of "Active - Interview" and "Active - Check References".

In addition to selecting the limits and applicable statuses, you can also customize the message that appears to applicants when they exceed the set limits. The **Message** field contains a default message that can be edited to add a personal touch that reflects your organization if desired.

The available settings are as follows:

- **Limit applications per individual applicant per day**. This allows you to control how many applications an applicant can submit per day.
- **Limit applications per account profile**. Similar to the previous option, this allows you to determine how many applications an applicant can submit over (your choice of) a number of days.
- **Limit the maximum active applications per individual applicant**. This option allows you to set the number of applications an applicant can have for the selected statuses, regardless of time frame or previous application status.
- **Limit applications per individual applicant per job code**. Limits the number of applications an individual applicant can submit for a specific job code, and can be further narrowed down based on previous application status.
- **Limit application per individual applicant per job title**. Limits the number of applications an individual applicant can submit for a specific job title, and can be further narrowed down based on previous application status.
- **Limit applications per individual applicant per requisition number**. Limits the number of applications an individual applicant can submit for a specific requisition number, and can be further narrowed down based on previous application status.

Note: Limits apply to individual job seeker accounts. If a seeker creates multiple accounts, the limits are applied to those separate accounts independently.

Editing Apply Limits

The application limits for your career site can be updated at any time.

1. From the main *Apply Limits* page, locate the item you wish to update.
2. Make the necessary updates to the available limit options.
3. When you have finished entering the necessary information for the limit, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the limit settings were successfully saved.

There are no adverse effects to an end user that already exceeds a limit you have changed (or added).

Web Messages

Web Messages appear on your career website as notices, alerts, event reminders or other important information you wish to deliver to potential candidates. This can include notes about applying for positions on the site or upcoming open house events.

The messages appear above the job listings on your career website.

The main *Web Messages* page provides a table view of messages in the system. This table displays basic information for messages used on your career site and allows you to perform actions on multiple messages at once.

Clicking the link under the "Name" column will take you to the *Web Message Detail* page for the selected item.

The table can be filtered using the **Search** panel to the left of the page. There is also a **Recent Web Messages** area under the panel that provides a list of recently accessed messages.

Web Message Detail

The *Web Message Detail* page allows you to adjust the options and settings for your web messages that appear on the career site.

There are several options available for each message in the system.

- **Name**. The name of the message. This will not be displayed on the site and is for reference purposes only.
- **Career Site**. If you have multiple career sites linked to Position Manager, you can select which one you want the message to display on using this drop-down list.
- **Start Display Date**. This determines when the message will start displaying on the career site.
- **End Display Date**. This date is the last day the message is displayed on the career site.
- **Status**. This is a read-only field that indicates the Status of the message. There are three Status possibilities:
    - **Pending**. The message has yet to be displayed on the site.
    - **Live**. The message is currently displaying on the site.
    - **Expired**. The message had once displayed on the site, but has since been removed.
- **Display First Always**. Selecting *Yes* for this option will ensure the message appears above any other web messages on the career site. If you select *Yes* for more than one message, the message that most recently was selected to display first will be displayed first on the career site. All other messages are displayed chronologically starting with the oldest start date.
- **Background Color**. This formatting option sets the background color for your web message.

- **Display Border**. Select *Yes* here to include a border around your web message. Borders appear in black.
- **Display Width**. With this option, you can set how much horizontal space the message will take up on the career site. Options include 25, 50, 75 and 100%.
- **Message to Display**. This is the actual body of the web message. There are several formatting options available using the toolbars above the text area.

Searching for Web Messages

Searching for messages in the system provides quick access to make necessary updates.

1. From the main *Web Messages* page, locate the **Search** area in the column on the left of the page.
2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
   - Type in a **Name** of the message.
   - Select a **Status** from the drop-down list.
   - Enter a date range in the **Live During** fields.
3. Click the **Search** button to perform the search with the entered variables.

After the **Search** button is clicked, the table to the right reloads and displays the results of the search.

Alternate Search Methods

Web messages that have recently been accessed can be reached by selecting them from the **Recent Web Messages** area under the search panel on the left of the screen.

Creating a Web Message

Users with necessary privileges in Position Manager can create new web messages to display on the career site.

1. From the main *Web Messages* page, click the **Add Web Message** button above the table. This will open the *Web Message: New* page.

2. Type in a **Name** for the message. This is an identifier for the message and is not displayed to users.

3. Select a **Career Site** from the drop-down list.

4. Type in a **Start Display Date**, or select a date from the calendar drop-down.

5. Type in an **End Display Date**, or select a date from the calendar drop-down.

6. Select if you want the message to **Display First Always** above other messages on the career site.

7. Type in a hex code for the **Background Color**, or select a color from the drop-down.

8. Select if you wish to **Display Border** around the message.

9. Select a **Display Width** for the message from the drop-down list.

10. Type in the **Message to Display**, using the text formatting tools available above the text box.

11. When you have finished setting all necessary options, click the **Save** button at the bottom of the page.

After the **Save** button is clicked, the page reloads and displays a message stating the message has been saved.

The new message will display on the selected career site on the determined start date.

Editing a Web Message

Web Messages can be updated at any time, regardless of their status.

1. From the main *Web Messages* page, locate the message you wish to update from the list. You can either search for a specific message or browse all available messages in the table.
2. Click the link for the message under the "Name" column. This will open the *Web Message Detail* page.
3. Make the necessary updates to the available message options.
4. When you have finished entering the necessary information for the message, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the message was successfully saved. If the message is Live, it will immediately reflect the changes.

Content

Announcements

Announcements are messages that appear on the Dashboard. They can be used to notify users of upcoming events or display important messages regarding your company.

Announcements can be tailored for individual roles in the system. This means you can determine which users are able to view each announcement in the system.

The main *Announcements* page provides a table view of announcements in the system. From this table, you can view basic information and perform actions on multiple announcements at once. Clicking a link under the "Name" column will take you to the *Announcement Detail* page for the selected item.

The Announcements table can be filtered using the **Search** panel to the left of the page. There is also a **Recent Announcements** area under the panel that provides a list of recently accessed announcements.

The table can be sorted by clicking on any of the available column headings.

Announcement Detail

The *Announcement Detail* page allows you to view and manage settings for announcements used by the Position Manager system.

There are several options available for each announcement in the system.

- **Name**. The name of the announcement. This is what appears on the table on the main *Announcements* page.
- **User Role(s)**. This determines which user role the announcement displays for on the Dashboard.
- **Start Date**. This determines when the message will start displaying on the Dashboard.
- **End Date**. This date is the last day the message is displayed on the Dashboard.
- **Subject**. The subject line for the announcement. Text entered into this field appears in the Announcements area of the Dashboard as the clickable link to read the message.
- **Status**. This is a read-only field that indicates the Status of the announcement. There are three Status possibilities:
  - **Pending**. The announcement has yet to be displayed on the site.
  - **Active**. The announcement is currently displaying on the site.
  - **Expired**. The announcement had once displayed on the site, but has since been removed.
- **Message to Display**. This is the actual body of the announcement. There are several formatting options available using the toolbars above the text area.

Creating an Announcement

Users with necessary privileges in Position Manager can create new announcements to display on the dashboard.

---

1. From the main *Announcements* page, click the **Add Announcement** button above the table. This will open the *Announcement: New* page.

2. Type in a **Name** for the message. This is an identifier for the message and is not displayed to users.

3. Select a **User Role** from the drop-down list. This determines which user role the message is displayed to.

4. Type in a **Start Date**, or select a date from the calendar drop-down.

5. Type in an **End Date**, or select a date from the calendar drop-down.

6. Type in a **Subject** for the announcement.

7. Type in the **Message to Display**, using the text formatting tools available above the text box.

8. When you have finished setting all necessary options, click the **Save** button at the bottom of the page.

After the **Save** button is clicked, the page reloads and displays a message stating the message has been saved.

The new announcement will display on the dashboard on the determined start date.

Editing an Announcement

Announcements can be updated at any time, regardless of their status.

1. From the main *Announcements* page, locate the message you wish to update from the list. You can either search for a specific message or browse all available messages in the table.

2. Click the link for the message under the "Name" column. This will open the *Announcement Detail* page.

3. Make the necessary updates to the available message options.

4. When you have finished entering the necessary information for the message, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the message was successfully saved. If the message is Active, it will immediately reflect the changes.

Searching for Announcements

Searching for announcements in the system provides quick access to make necessary updates.

1. From the main *Announcements* page under the **Admin** tab, locate the **Search** area in the column on the left of the page.

2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
   - Type in a **Name** of the announcement.
   - Select a **Status** from the drop-down list.
   - Enter a date range in the **Active During** fields.

3. Click the **Search** button to perform the search with the entered variables.

After the **Search** button is clicked, the table to the right reloads and displays the results of the search.

Announcements that have recently been accessed can be reached by selecting them from the **Recent Announcements** area under the search panel on the left of the screen.

Communication Templates

Communication Templates are email and document templates for notifications sent to applicants directly from the Position Manager system. The *Communication Templates* page is used to manage email templates in Position Manager.

The main *Communication Templates* page provides a table view of email templates in the system. From this table, you can view basic information and perform actions on multiple templates at once. Clicking a link under the **Template Name** column opens the *Communication Template Detail* page for the selected item.

The *Communication Templates* table can be filtered using the **Search** panel to the left of the page. There is also a *Recent Templates* area under the panel that provides a list of recently accessed templates.

Sorted the table by clicking any of the available column headings.

Clicking the **+** (plus symbol) next to a template in the table expands the table entry and identifies which hierarchies can utilize the template.

Adding a Communication Template

Custom Communication Templates can be added to further tailor email correspondence sent directly from Position Manager.

1. From the main *Communication Templates* page, click the **Add Template** button above the templates table.

2. In the *Select Template Type* pop-up window, select a **Template Type** from the drop-down list and click the

OK button. The site will reload and open the *Communication Template Detail* page.

3. Select a **Status**.
4. Enter a **Name** for the template.
5. Enter a **Description** for the template.
6. Select an **Organization**.
   a. Click the **Search** icon to the right of the **Organization** field.

   b. From the *Organization Hierarchy* pop-up window, select the check box next to the desired organization and click the **OK** button.

   > **Note:** Selecting the Global level makes the template available to everyone in your organization.

   > **Note:** There is no limit to the number of options that can be selected from the Organization menu.

7. Type the **Body** of the template. Body text can be formatted using the tools available above the text window.
8. If desired, add **Merge Fields**. Merge fields can be added to the Subject and Body of the template.
   a. From the drop-down list, select an area of the system from which you want to add fields.

   b. Click the name of the field from the list that displays. The selected field will be inserted into the body of the email

at the current location of the cursor.

> **Note:** There is no limit to the number of Merge Fields that can be added to the template.

9. Select the **Save** button.

After the **Save** button is clicked, you are taken back to the *Communication Templates* page. The new template appears in the table and is available for use in the system.

Communication Template Detail

The *Communication Template Detail* page allows you to view and manage settings for correspondence templates used by the Position Manager system.

There are several options available for each template in the system. Each template may use some or all of these fields.

- **Status**. This determines if the template is Active (available for use) or Inactive (not visible to users in the system).
- **Name**. The name of the template. This is the name that appears in selection drop-down lists.
- **Description**. A brief description of what the template's purpose is and when/where it should be used.

- **Organizations**. This determines which organizations will have access to the template. Only selected organizations will be able to use the template for email correspondence.
- **Return Email Address**. This sets the email address that replies to the template are directed towards. Options include:
  - **Default To**. This option will automatically set the return email address to the option selected from the drop-down list (Recruiter or Hiring Manager).
  - **Email**. This allows you to type in a specific email address to be used for a return address.
- **Subject**. Text entered here appears in the Subject of the email that is sent using the template.
- **Body**. This is the Body of the email that is sent using the template. There are several formatting tools above the Body field to help further customize the template.
- **Merge Fields**. This allows the inclusion of form fields in the email that will automatically populate once the email is sent. These fields can be pulled in from the Applicant, Requisition and other areas of the system.

Communication Template Types

There are several types of Communication Templates that can be used for sending correspondence from the Position Manager system.

The available types of Communication Templates are as follows:

- **Alert for recruiter**. Sent to recruiters when an applicant has submitted an application via a career site.
- **Applicant Correspondence**. The Applicant Correspondence templates are email templates that can be customized to address any subject or need. Multiple templates of this type can be created for a variety of communications.
- **Application Email Reply**. This email is automatically sent to applicants upon completion of an application for a job posting. You can create separate email templates for your internal and external applicants.
- **Assessment Invitation**. Sent to applicants when they are invited to complete an assessment.
- **Comments**. This template is used to gather Hiring Manager comments and their responses regarding applicants.
- **Document Notification**. This template is used when documents are added from template or computer.
- **Documents**. This is a generic document that can be attached to an applicant's profile, such as an Offer Letter. When using this template, you will be able to modify the content of the document prior to sending it out. The Hiring Manager may also be notified of this document, so they can make any additions or revisions before it is finalized.
- **Hiring Manager**. This template notifies Hiring Managers that they have a form to complete for one or more applicants.
- **Hiring Manager Applicant Review**. This template is used to help manage the applicant review process. Emails using this template are sent when a Hiring Manager has applicants to review and when they have reviewed them, or notifies a Recruiter if the Hiring Manager hasn't reviewed applicants after a configurable number of days. You may edit this template, but cannot delete or add additional templates of this type.
- **Invitation to apply**. Sent to applicants to invite them to submit a full application after submitting a short-form application.
- **Job Alert/Career Mail**. The Job Alert/Career Mail email contains information from Position Manager regarding job postings and general employment news about your organization. It is used to send application email alerts when a job post-

ing matches the configured job alert settings. You may edit this template, but cannot delete or add additional templates of this type.

- **Message Reply Notification**. This form will notify a Recruiter or Hiring Manager when a user has replied to their communication.
- **New Hire Correspondence**. These email templates are used for notifications sent to applicants being hired.
- **Onboarding**. Onboarding communication templates are used to notify users about the status of paperwork sent to applicants for completion during the onboarding process.
- **Prequalification Message**. This notice is shown to applicants that have not met the minimum requirements for a requisition while completing a prequalification questionnaire. This is a message displayed on the website, not an email that is sent out.
- **Reference Assessment Invitation**. Sent to applicants to provide instructions on how to submit references.
- **Requisition Approved Notification**. Sends an email notification to Hiring Managers once a requisition has been approved.

- **Requisition Notification**. Requisition notifications consist of two templates:

    - **Hiring Manager**. Requisition is being reworked.
    - **Review**. Requisition is awaiting approval.
- **Task Escalation**. Allows administrators to specify how many days it takes before a user is sent an email reminder for any outstanding tasks they need to complete.

Editing a Communication Template

Communication Templates can be edited to further tailor email correspondence sent directly from Position Manager.

1. From the main *Communication Templates* page, locate the template you wish to update from the list. You can either search for a specific template or browse all available templates in the table.
2. Click the link for the template under the "Template Name" column. This will open the *Template Detail* page.
3. Make the necessary updates to the available template options.
4. When you have finished entering the necessary information for the template, click the **Save** button to complete the process.

After the **Save** button has been clicked, the system will display a message stating the template was successfully saved.

Updates to the template are available the next time the template is used to send a communication.

Communications based on the template that were sent prior to updating the template remain unchanged.

Searching for Communication Templates

A standard search feature is provided on the main *Communication Templates* page to provide quick access to records that need to be reviewed and/or updated.

1. From the main *Communication Templates* page, locate the **Search** area in the column on the left of the page.

2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.

   - Select desired options from the **Status** drop-down list.
   - Enter a **Template Name**.
   - Select a **Template Type** from the drop-down list.
   - Select an **Organization**.
     i. Click the **Search** icon to the right of the **Organization** field.

     ii. From the *Organization Hierarchy* pop-up window, select the check box next to the Organization and click the **OK** button.

     > **Note:** There is no limit to the number of options that can be selected from the Organization menu. You may be limited by your permissions as to which organizations are available to select.

3. Click the **Search** button to perform the search with the entered variables.

The Communication Templates table reloads to display those results that match the criteria used for the search.

Alternate Search Methods

You can select from a list of recently accessed templates that are displayed at the bottom of the search panel. Clicking one of these links will open the *Communication Templates Detail* page.

Fields

Fields appear throughout the Position Manger system in forms and templates. They store a variety of data, including text, numbers and dates.

When configuring your Position Manager system, you will need to first define the fields you wish to use before you can develop forms and templates. Only active fields can be added to forms.

The main *Fields* page provides easy access to fields used in the system. From the *Fields* page, you are able to add, remove and make edits to fields as necessary. Using the available table and drop-down list, you can also perform actions on multiple fields at once.

There are two types of fields: Standard and Custom.

- **Standard**. Standard fields are included by default in every Position Manager system. You will not be able to edit the **Name** and **Data Type** of Standard fields.
- **Custom**. Custom fields can be created and added to forms at any time. All of the parameters for these fields can be edited.

Adding a Field

Though all Position Manager systems come pre-loaded with a set of Standard fields, you can create Custom fields that can be added to forms and templates.

1. From the main *Fields* page, click the **Add Custom Field** button above the Fields table. This will open the *Custom Field Detail* page.

2. Type in a **Name** for the field. This will be the unique identifier for the field in the system database.

3. Type in a **Display Name** for the field. This is what is displayed to users.

4. Type in a **Description** of the field, if necessary.

5. Select the **Is Secure?** checkbox if the field is a Secure field.

6. Select the **Is EEO?** checkbox if the field should be included in EEO reports. Fields with this flag can appear in your apply process to collect EEO data from your applicants.

7. From the **Data Type** drop-down menu, select which type of data the new field will contain.

   If the *List* data type is selected, additional options are required to complete the process.

   Additional steps for List fields.

   a. Select the **Sort Order** for the list.

   b. Add selection options to the list field:
      i. Click the **Add new record** button. A new row will appear in the table.
      ii. Enter a **Name** for the option. This is what users will see in the list.
      iii. Enter a **Description** for the option, if necessary.
      iv. Enter a **Short Name** for the option, if necessary.
      v. Click the **Active** option. This makes the option selectable in the list field.
      vi. Click the **Insert** link. The option has now been added to the list.

   c. Repeat the above steps for each option to appear in the list.

8. When you have finished entering the necessary information for the new field, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the field was successfully added. The new field is now available to add to forms in the system.

Editing a Field

Existing fields can be updated at any time. All options for Custom fields can be changed, while Standard fields limit the number of options that can be altered.

1. From the main *Fields* page, locate the field you wish to update from the table. You can either search for a specific field or browse all available fields in the table.

2. Click the link for the field under the "Field Name" column. This will open the *Field Detail* page.

3. Make the necessary updates to the available field options.

> **Note:** If editing a Standard field, you will not be able to make changes to the **Name** or **Data Type** options.

4. When you have finished entering the necessary information for the field, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the field was successfully saved. Updates are immediately reflected in the system wherever the field appears.

Editing a List Field

List fields, which display as drop-down lists in forms, can have their displayed values updated.

1. From the main *Fields* page, locate the field you wish to update from the list. You can either search for a specific field or browse all available fields in the table.

2. Click the link for the field under the "Field Name" column. This will open the *Field Detail* page.

Add new value to the list

1. Select the **Add new record** button. This will add a new row to the values table.

2. In the text box in the "Name" column, enter the value to appear in the list.

3. Click the **Insert** button when finished. This will save the new value to the list.

Edit an existing value

1. Click the **Edit** link next to the desired value.

2. Make the necessary edits to the value.

3. Click the **Update** button when finished. This will save the updated value to the list.

De-activate a value in list

Deactivating means the value will not appear to users, but remain in the list under the Admin area.

1. Select the **Edit** link next to the desired value.

2. Uncheck the checkbox under the "Active" column.

3. Select the **Update** link.

> **Tip:** When deactivating values, make sure to select the *Show All* option from the drop-down list located to the upper right of the values table. This drop-down controls which values are displayed in the table: **All**, **Active** or **Inactive**.

When you have finished updating list items, click the **Save** button to complete the process.

After the **Save** button has been clicked, the system displays a message stating the field was successfully saved. The updated list values are immediately reflected in the system wherever the field appears.

If a value is edited or removed, the original value is retained in any records that used that value before the update was performed.

Field Detail

The *Field Detail* page displays all the configurable information for a field used by the Position Manager system. The detail page is used when adding a new field or editing an existing field.

There are several options available for each field in the system.

- **Name**. This is the unique identifier for the field in the system database.
- **Display Name**. The field label that is displayed to users.
- **Description**. Area to provide a brief description of the field and its intended use.
- **Status**. This determines if the field is available to include on forms in the system. An Inactive field cannot be added to forms.
- **Secure fields**. Secure fields contain sensitive information about applicants, such as social security numbers and bank accounts. Only users with necessary privileges can view secure fields.
- **EEO fields**. EEO stands for Equal Employment Opportunity. Fields with this option selected are automatically included on reports generated by the system for EEO purposes.
- **Data Type**. There are several types of data that fields can hold:
    - **Text**. Contains alphanumeric characters – basically anything typed into the field using the keyboard.
    - **Date**. Contains Dates, which can either be typed in or selected from a calendar.
    - **Integer**. Fields that only take whole numbers – they will not accept any other characters or numbers with decimals.
    - **List**. Drop-down menus. You can determine what values appear in the lists and in which order they appear to users.
    - **Decimal**. Like the Integer field, this also contains numbers. However, a decimal field accepts numbers with decimal points (i.e. 2.5) as well as whole numbers.

- **Label**. These are descriptor fields that hold no data; they are simply used to provide information or instructions to users.
- **Add Questionnaire**. Questions tailored to the specifics of your requisition can be added to individual fields, and used as pre-qualification questions presented to applicants during the apply process. Field questionnaires can be included with other pre-qualification questionnaire templates when creating a requisition. Learn more

Searching for Fields

Searching for fields in the system provides administrators quick access to make necessary updates.

1. From the main *Fields* page under the **Admin** tab, locate the **Search** area in the column on the left of the page.
2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
   - Type in a **Field Name**. This is the unique identifier for the field in the system database.
   - Type in a **Display Name**. This is the name of the field as displayed to users in forms.
   - Select a **Status** from the drop-down list.
     - **Active**: the field is available to add to forms and/or viewable by users.
     - **Inactive**: the field is not used on any forms and not viewable to users.
   - Select a **Field Type** from the drop-down list.
     - **Standard**: field that is used on forms included with your Position Manager system.
     - **Custom**: field that has been added by system administrators.
   - Select a **Data Type** from the drop-down list.
3. Click the **Search** button to perform the search with the entered variables.

After the **Search** button has been clicked, the Fields table to the right reloads and displays the results of the search.

Alternate Search Methods

Fields that have recently been accessed can be reached by selecting them from the **Recent Fields** area under the search panel on the left of the screen.

Job Templates

Job Templates are templates for requisitions that are used to both speed the requisition process and standardize job posting data by pre-filling some (but not all) fields in requisition and job posting forms. Job templates are required to create requisitions for jobs.

The *Job Templates* page is used to manage job templates in Position Manager.
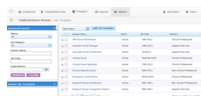
The main *Job Templates* page provides a table view of job templates in the system. From this table, you can view basic information and perform actions on multiple templates at once. Clicking a link under the **Position Title** column takes you to the *Job Template Detail* page for the selected item.

The **Job Templates** table can be filtered using the **Search** panel to the left of the page. There is also a **Recent Templates** area under the panel that provides a list of recently accessed templates.

The table can be sorted by clicking on any of the available column headings.

Clicking the "**+**" (plus symbol) next to a template in the table expands the table entry and displays additional information about that record.

Adding a Job Template

Custom Job Templates can be added to Position Manager. There is no limit to the number of job templates you can add to the system.

1. From the main *Job Templates* page, click the **Add Job Template** button above the templates table. The site will reload and open the *Job Template Detail* page.

2. Complete the fields as necessary for the new template.
3. Click the **Save** button when finished.

After the **Save** button is clicked, you are taken back to the *Job Templates* page. The new template appears in the table and is available for use in the system.

Editing a Job Template

Job Templates can be edited to further tailor templates to specific job and requisition requirements.

1. From the main *Job Templates* page, locate the template you wish to update from the list. You can either search for a specific template or browse all available templates in the table.
2. Click the link for the template under the "Template Name" column. This will open the *Template Detail* page.
3. Make the necessary updates to the available template options.
4. When you have finished entering the necessary information for the template, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the template was successfully saved.

Updates to the template are available the next time the template is used to create a requisition.

Requisitions based on the template that were created prior to updating the template remain unchanged.

Job Template Detail

The *Job Template Detail* page allows you to view and manage settings for job requisition templates used by the Position Manager system. Options set on this page are used when the template is used to create a requisition.

There are several options available for each template in the system, broken down into separate sections.

Basic Information

- **Status**. This determines if the template is *Active* (available for use) or *Inactive* (not visible to users in the system).
- **Position Title**. The name of the position the template will be used for.
- **Posting Title**. The position name that will appear when the job is posted to job boards.
- **Job Code**. An internal job code for the template.
- **Select Organizations**. This determines which organizations will have access to the template. Only selected organizations will be able to use the template for requisitions.
- **Job Category**. This option determines which job category the template can be used to create requisitions for.
- **Education**. Sets the level of education required for the requisition template.
- **Licenses/Certification**. Determines which licenses and/or certifications are required for the requisition. Multiple selections are available for the option.
- **Experiences**. Sets the number of years of experience required for the requisition. Multiple selections are available for the option.
- **EEO Job Group**. Determines the EEO job group for the requisition template.
- **Knowledge, Skills and Abilities**. A text area field where you can enter text to appear in the requisition.
- **Internal Email Reply Template**. Automatic notification sent to applicants who are internal to your organization.
- **External Email Reply Template**. Automatic notification sent to external applicants.
- **Display in Job Agent/Career Mail**. A selection of *Yes* means job seekers will receive notifications from the career site when job openings based on the template are posted.

Schedule/Pay

- **Schedule**. Sets the schedule for the requisition.
- **Shift**. Sets shift information for the requisition.
- **Hours**. Sets the weekly hours for the requisition.
- **Salary Range**. Sets the salary range for the requisition.
- **Pay Grade**. Sets the pay grade for the requisition.
- **Job Status**. Sets the job status for the requisition.

> **Note:** Options available in drop-down lists are controlled from the Fields page under the **Admin** area.

Job Summary

The Job Summary section provides a large text area for entering text that summarizes the requisition details. This section should be used to provide a brief overview of key requirements and duties. Several formatting options are available above the text area.

Text entered into the **Job Summary** field is used as the description for jobs when posted to job boards.

Job Description

The Job Description section provides a large text area for entering text that describes the requisition. This section should be used to provide a detailed description of requirements, daily tasks and other duties for the job. Several formatting options are available above the text area.

Screening

The Screening section allows you to select which questionnaires and assessments will be attached to the job template.

- **Pre-qualification Questionnaire**. This option determines which pre-qualification questionnaire is presented to applicants applying for a job created from the template.
- **Pre-qualification Rejection Message**. This option determines which message appears to users after completing the pre-qualification questionnaire.
- **Ranking Questionnaire**. This option determines which ranking questionnaire is presented to applicants applying for a job created from the template.
- **Reference Benchmark**. Determines the benchmark used for references. Only available with HealthcareSource Reference Assessment integration.
- **Behavioral Assessment**. Determines the behavioral assessment tool to use with the job posting. Only available with HealthcareSource Staff Assessment integration.
- **Job Family**. Determines the focus of the behavioral assessment selected in the previous field.

Searching for Job Templates

A standard search feature is provided on the main *Job Templates* page to provide quick access to templates that need to be reviewed and/or updated.

1. From the main *Job Templates* page, locate the **Search** area in the column on the left of the page.
2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
    - Select a **Status** from the drop-down list.
    - Select a **Job Category** from the drop-down list.

    > **Note:** There is no limit to the number of options that can be selected from the available menu.

    - Enter a **Position Name**.
    - Enter a **Job Code**.
    - Select an **Organization**.
        i. Click the **Search** icon to the right of the **Organization** field.
        ii. From the *Organization Hierarchy* window, select the check box next to the Organization and click the **OK** button.

3. Click the **Search** button to perform the search with the entered variables.

The Job Templates table reloads to display those results that match the criteria used for the search.

Alternate Search Methods

You can select from a list of recently accessed job templates that are displayed at the bottom of the search panel. Clicking one of these links will open the *Job Template Detail* page.

Questionnaires

Questionnaires are used in Position Manager during the application process to gather specific information from potential candidates for job openings. Position Manager allows you to customize the questions (and response options) that appear on forms and choose which questionnaires an applicant must complete for each job posting.

The main *Questionnaires* page provides a table view of questionnaires in the system.

From this table, you can view basic information and perform actions on multiple questionnaires at once. Clicking the link under the **Name** column will take you to the *Questionnaire Detail* page for the selected item.

The **Questionnaires** table can be filtered using the **Search** panel to the left of the page. There is also a **Recent Questionnaires** area under the panel that provides a list of recently accessed questionnaires.

The table can be sorted by clicking on any of the available column headings.

A lock icon ( ) means the template is currently associated with a job posting and cannot be edited.

There are four types of questionnaires:

- **Pre-qualification**. Pre-qualification questionnaires determine if an applicant meets the minimum requirements for a job posting. Applicants that do not meet minimum requirements as defined in the questionnaire are blocked from continuing the application process.

- **Ranking**. Ranking questionnaires provide a basis for comparing applicants by using a weighting system on questions. These weighted questions are used to determine which applicant best matches a particular job opening.

- **Custom Form**. Custom Form questionnaires are completed by employees who are part of the hiring process (i.e. hiring manager). These are not seen or completed by an applicant.

- **Global Questionnaire**. Global questionnaires are completed by applicants in the apply process.

Adding Questions to Questionnaires

Inquiries on questionnaires are customizable to help gather necessary information from applicants.

All of the steps detailed below take place on the *Questionnaire Detail* page for a specific Questionnaire.

The procedure for adding questions to a questionnaire varies depending on which type of questionnaire you are working with.

Adding questions to Pre-Qualification questionnaires

1. Locate the **Question Information** section on the *Questionnaire Detail* page.

2. Select the **Add** button. The page will reload and display additional configuration areas for the new question.

3. In the **Details for Question** section:
   a. Type in the **Question**. This is displayed as the actual question to applicants completing the questionnaire.
   b. Select an **Orientation**.
      - **Horizontal**. The answer options are listed side-by-side.
      - **Vertical**. The answer options are listed one on top of another.
4. In the **Answers for Question** section:
   a. Select the **Add** button. A new row is added to the table below.
   b. Type in **Display Text**. This is displayed as a possible answer to the question to applicants completing the questionnaire.
   c. If the answer is the desired response for the question, select the **Correct?** option for that answer.
   d. Repeat the above steps for each possible response to the question.

   > **Note:** There can only be one correct answer for each question. You must indicate at least one answer as the correct one.

5. Select the **Apply** button. The question will appear in the table under the Question Information section of the page.
6. Repeat the above steps until all necessary questions have been added to the questionnaire.
7. When all questions have been added, click the **Save** button.

Adding questions to Ranking questionnaires

1. Locate the **Question Information** section on the *Questionnaire Detail* page.

2. Select the **Add** button. The page will reload and display additional configuration areas for the new question.

3. In the **Details for Question** section:
    a. Type in the **Question**. This is displayed as the actual question to applicants completing the questionnaire.
    b. Select an answer **Type**.
        - **Radio Buttons**. These types only allow users to select one of the available options.
        - **Check Boxes**. Check boxes allow applicants to select multiple responses.
        - **Text Field**. This is a single-line text field.
        - **Text Area**. This is a multiple-line text field.

    c. Select a **Weight**. This determines how applicant answers to the question are evaluated. A five (5) is the most important; one (1) is the least important. You can also select None to not score the question.

    > **Note:** Questions with an answer type of Text Field and Text Area can only have a weight of None.

    d. Select an **Orientation**.
        - **Horizontal**. The answer options are listed side-by-side.
        - **Vertical**. The answer options are listed one on top of another.

4. In the **Answers for Question** section:

   a. Select the **Add** button. A new row is added to the table below.

   b. Type in **Display Text**. This is displayed as a possible answer to the question to applicants completing the questionnaire.

   c. If the answer is the desired response for the question, select the **Correct?** option for that answer.

   d. Repeat the above steps for each possible response to the question.

   > **Note:** There can only be one Correct answer for each question. You must indicate at least one answer as the correct one.

5. Select the **Apply** button. The question will appear in the table under the Question Information section of the page.

6. Repeat the above steps until all necessary questions have been added to the questionnaire.

7. When all questions have been added, click the **Save** button.

Adding questions to Custom Forms

1. Locate the **Question Information** section on the *Questionnaire Detail* page.

2. Select the **Add** button. The page will reload and display additional configuration areas for the new question.

3. In the **Details for Question** section:
   a. Type in the **Question**. This is displayed as the actual question to applicants completing the questionnaire.
   b. Select an answer **Type**.
      - **Radio Buttons**. These types only allow users to select one of the available options.
      - **Check Boxes**. Check boxes allow applicants to select multiple responses.
      - **Text Field**. This is a single-line text field.
      - **Text Area**. This is a multiple-line text field.
   c. Select an **Orientation**.
      - **Horizontal**. The answer options are listed side-by-side.
      - **Vertical**. The answer options are listed one on top of another.
4. In the **Answers for Question** section:
   a. Select the **Add** button. A new row is added to the table below.
   b. Type in **Display Text**. This is displayed as a possible answer to the question to applicants completing the questionnaire.
   c. Repeat the above steps for each possible response to the question.
5. Select the **Apply** button. The question will appear in the table under the Question Information section of the page.
6. Repeat the above steps until all necessary questions have been added to the questionnaire.
7. When all questions have been added, click the **Save** button.

After the **Save** button is clicked, you are taken back to the *Questionnaires* page.

The updated question(s) are available the next time the questionnaire is used during the application process. Updates do **not** affect questionnaires already completed by applicants.

Copying a Questionnaire

Any questionnaire can be copied to create a new questionnaire with the same details.

1. From the main *Questionnaires* page, locate the questionnaire you wish to copy from the list. You can either search for a specific questionnaire or browse all available questionnaires in the table.
2. Click the link for the questionnaire under the "Name" column. This will open the *Questionnaire Detail* page.
3. From the **Take Action** menu, select the *Copy Questionnaire* option. A pop-up window opens asking if you wish to copy the current questionnaire.
4. Click the **OK** button. The *Questionnaire Detail* page reloads, showing the same details from the copied questionnaire.
5. Enter a **Name** for the new questionnaire.
6. Make the necessary updates to the available questionnaire options. To update specific questions and/or answers, select the item from the table in the **Question Information** section and edit as necessary.
7. When you have finished updating information for the questionnaire, click the **Save** button to complete the process.

Clicking the **Save** button saves the questionnaire. If the questionnaire was set to *Active*, it is now available to use for job postings.

Creating a Questionnaire

New questionnaires can be added to the Position Manager system to help tailor the application process for specific information gathering needs.

1. From the main *Questionnaires* page, click the **Add Questionnaire** button above the table.

2. From the *Select Questionnaire Type* pop-up window, select a type from the drop-down list and click the **OK** button. This will open the *Questionnaire Detail* page.

3. Type in a **Name** for the questionnaire. This will be the unique identifier for the questionnaire in the system database.
4. Type in a **Display Name** for the questionnaire. This is what is displayed to users.
5. Type in **Instructional Text** for the questionnaire, if necessary. This is displayed to applicants before they complete the questionnaire. You are encouraged to use this area to explain to applicants how information gathered in the questionnaire is used in the hiring process.
6. Select if the questionnaire should be **Active** (available for use in the system) or **Inactive** (unavailable to use in the system).

7. Under the **Question Information** area, add the questions you wish to appear in the questionnaire.

Note: Please see the topic on [Adding Questions to Questionnaires](#) for detailed instructions on adding questions.

8. Select the **Save** button.

After the **Save** button is clicked, you are taken back to the *Questionnaires* page. The new questionnaire appears in the table.

Editing a Questionnaire

Questionnaires can be edited to further tailor application forms and gather specific information from applicants.

Note: You cannot edit a questionnaire that is already associated with a job posting.

1. From the main *Questionnaires* page, locate the questionnaire you wish to update from the list. You can either search for a specific questionnaire or browse all available questionnaires in the table.
2. Click the link for the questionnaire under the "Name" column. This will open the *Questionnaire Detail* page.
3. Make the necessary updates to the available questionnaire options. To update specific questions and/or answers, select the item from the table in the **Question Information** section and edit as necessary.
4. When you have finished updating information for the questionnaire, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the questionnaire was successfully saved.

Searching for Questionnaires

A standard search feature is provided on the main *Questionnaires* page to provide quick access to records that need to be reviewed and/or updated.

1. From the main *Questionnaires* page, locate the **Search** area in the column on the left of the page.
2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
    - Enter a questionnaire **Name**.
    - Enter a specific **Question** that appears on the questionnaire.
    - Select a questionnaire **Type** from the drop-down list.
    - Select a **Status** from the drop-down list.
3. When all necessary criteria has been entered, click the **Search** button.

The Questionnaires table reloads to display those results that match the criteria used for the search.

Alternate Search Methods

You can select from a list of recently accessed questionnaires that are displayed at the bottom of the search panel. Clicking one of these links will open the *Questionnaire Detail* page.

Questionnaire Detail

The *Questionnaire Detail* page provides an area to view and make necessary edits to questionnaire forms in Position Manager. It displays the available options for the selected questionnaire form.

- **Name**. This field identifies the questionnaire in the database and is not displayed to users.
- **Display Name**. This is the name of the questionnaire form that is shown to applicants.
- **Instructional Text**. This field is displayed to applicants as instructions for completing the questionnaire form.
- **Status**. This determines if the questionnaire is active (available for use in the system) or inactive (not visible to users in the system).
- **Questionnaire Type**. This is a display-only field that indicates the type of questionnaire (Pre-qual, Ranking, or Custom).
- **Question Information**. This part of the *Questionnaire Detail* page displays the questions that are used on the form. You can make edits to the questions asked and available responses in this area.

Onboarding

Documents

The *Documents* page is where any and all pertinent documents to the new hire onboarding process are stored.

Documents can be searched by their name, type, state (draft status), or organization.

When you have found the document you need, you may click its name in the document list to view, edit, or delete it. Alternately, clicking the **+** symbol next to its name displays any organizations where the document is available.

Onboarding Document Groups

Document Groups are used to quickly assign packets of information to applicants selected for a job opening. These packets contain both informational documents (description of benefits offered), as well as procedural forms that must be completed by the applicant (tax forms).

When onboarding an applicant, you have the option to select a predefined document group for the applicant.

Document groups can be associated with specific job positions in the Position Manager system and/or entities in your organizational hierarchy. When a group is assigned to either a position or hierarchy entity, that group is only available for the selected positions/hierarchy.

The main *Document Groups* page provides a table view of document groups in the system.

From this table, you can view basic information and perform actions on multiple document groups at once. Clicking the link under the **Group Name** column takes you to the *Document Group Detail* page for the selected item.

The **Document Groups** table can be filtered using the **Search** panel to the left of the page. There is also a **Recent Document Groups** area under the panel that provides a list of recently accessed document groups.

The table can be sorted by clicking on any of the available column headings.

Onboarding Document Group Detail

The *Onboarding Document Group Detail* page allows you to view and manage settings used for document groups used by the onboarding feature of Position Manager. This page allows users to add, remove, and re-organize documents for a document group.

The *Onboarding Document Group Detail* page displays the available options for the selected document group.

- **Group Name**. This indicates the name of the document group, which appears in drop-down menus when using onboarding features.
- **Description**. This is a text field to provide a basic description of the document group.
- **Organization**. This field indicates those entities in your organizational structure for which the document group is available. This allows you to limit the use of a document group and tailor a group to specific areas of your organization.
- **Position Title**. Much like the previous field, Position Title provides the ability to limit use of the document group to specific position titles in the system.
- **Documents table**. The table displayed shows which documents are currently part of the group. The table allows you to add, remove, and re-order available documents.

Onboarding Welcome Messages

Welcome messages are displayed to applicants that have been selected for hire. These messages are displayed on the **New Hire** tab on the career site.

The main *Welcome Messages* page provides a table view of messages in the system.
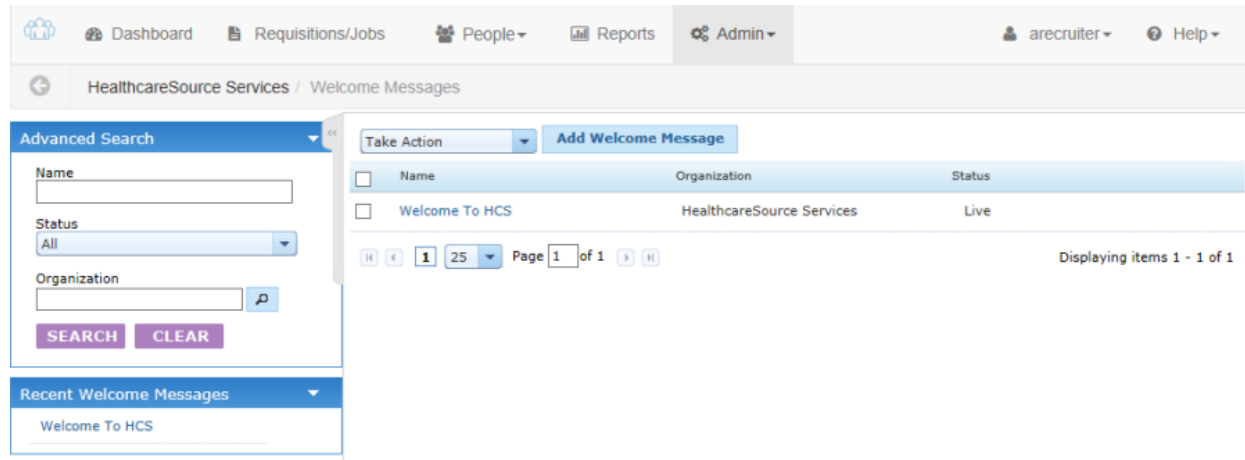
From this table, you can view basic information and perform actions on multiple messages at once. Clicking the link under the **Name** column takes you to the *Welcome Message Detail* page for the selected item.

The messages table can be filtered using the **Search** panel to the left of the page. There is also a **Recent Welcome Messages** area under the panel that provides a list of recently accessed messages.

The table can be sorted by clicking any of the available column headings.

Onboarding Welcome Message Detail

The *Onboarding Welcome Message Detail* page allows you to view and manage settings used for welcome messages used by the onboarding feature of Position Manager. It displays the available options for the selected message.

- **Name**. This indicates the name of the message.
- **Status**. This is the status of the message. Messages can either be "Live" (actively in use on a career site) or "Expired".
- **Select Organization**. This field indicates those entities in your organizational structure for which the message is available. This allows you to customize the welcome message for different areas in your organization.
- **Message to Display**. This text box contains the actual message that is displayed to applicants on the career site.

Organization

Hierarchy

A Hierarchy Organization is the organizational chart for your organization and the basic foundation for your Position Manager system. It defines the structure and relationship of your facilities, departments, sub-departments and other areas. This structure is then used to determine a variety of system settings, such as where defined requisitions and jobs reside, what areas of your Position Manager system users will have access to, and so on.

The *Manage Hierarchy Organizations* page provides a "tree" view of your organization's structure.
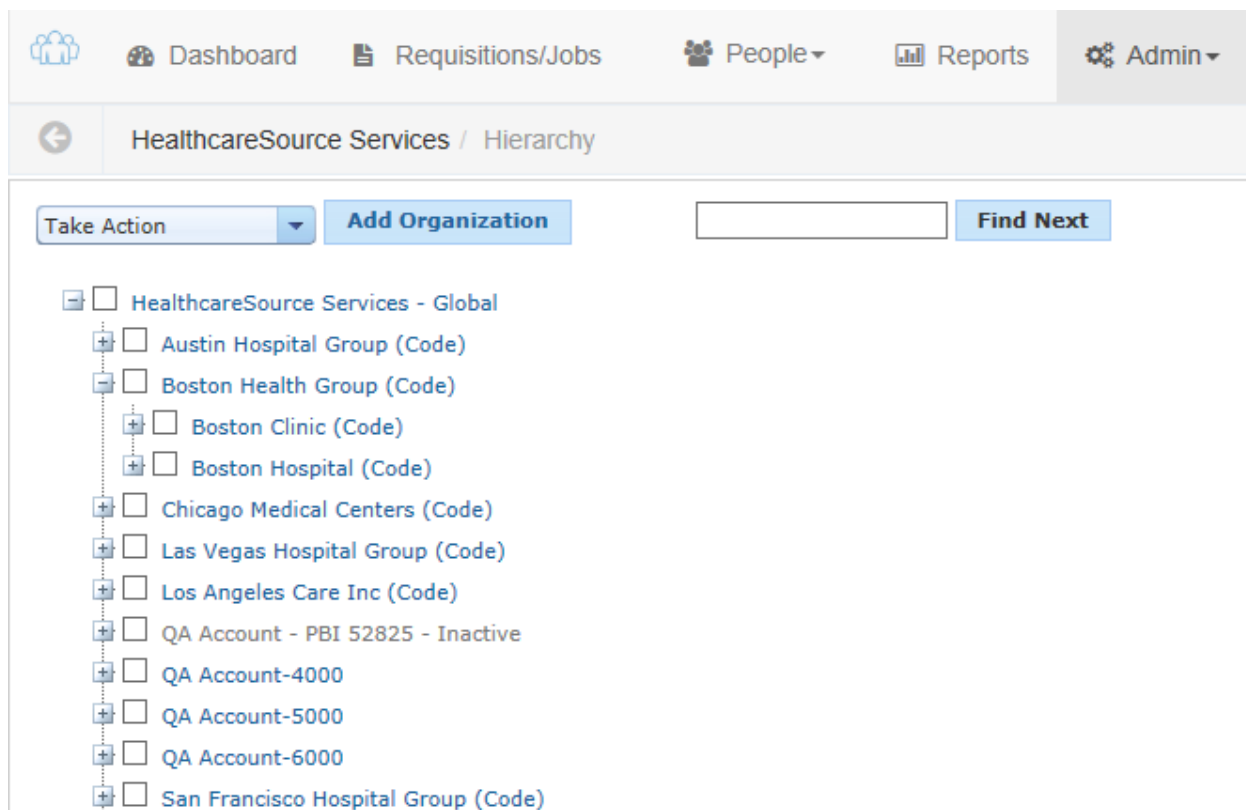
The expandable sections allow you to view all the levels of your organization. Clicking the name of one of the levels will take you to the *Hierarchy Organization Detail* page for that item.

The available search filter allows you to quickly locate specific items in the hierarchy.

Clicking the "**+**" (plus symbol) next to an item in the tree view will expand that level and display all sub-levels for the item. Position Manager allows up to seven (7) levels for an organizational hierarchy:

- Global client
- Account
- Facility
- Department
- Section
- Sub-section
- Sub-sub-section (for lack of a better term)

The labels of the different sections shown above are provided for reference or example purposes only; you may customize the levels as required for your organization.

It is not required that you utilize every level; you can go as deep or shallow as necessary.

Each level of the hierarchy can contain an unlimited number of entities.

Adding a Hierarchy Organization

If necessary, administrators can add new hierarchy organizations to their site structure.

1. From the main *Hierarchy Organizations* page, click the **Add Organization** button. The *Hierarchy Organization Detail* page will open.
2. Type in a **Name** for the entity.
3. Select a hierarchy level from the **Type** drop-down list.

> **Note:** Your selection from the **Type** drop-down list will determine available options in the **ParentID** field, as well as which other informational fields are visible.

4. Select where in the hierarchy the new organization will reside from the **ParentID** drop-down list.
5. Type in a **Code** for the organization.
6. Type in the **Budgeted FTEs** for the organization.
7. If available, complete the remaining fields for the organization.
8. When finished entering necessary details for the entity, click the **Save** button.

After the **Save** button is clicked, the page reloads and displays a message stating the organization was successfully added. The new entity is now available throughout the system.

Editing an Organization in the Hierarchy

The details for an organization can be updated as necessary.

Warning: Changing an entity's position/location within your organization may affect user group privileges associated with the entity. Please take care when making such changes to your organizational structure.

1. From the main *Manage Hierarchy Organizations* page, locate the organization you wish to update from the list. You can either search for a specific organization or browse all available items in the tree view.
2. Click the name link for the organization. This will open the *Hierarchy Organization Detail* page.
3. Make the necessary updates to the available organization options.
4. When you have finished entering the necessary information for the organization, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the organization was successfully updated.

Hierarchy Organization Detail

The *Hierarchy Organization Detail* page allows you to view and manage general information for the levels of your organizational structure in the Position Manager system.

There are several options available for each entity in your organizational structure. The list below details all of the available fields; however, not all hierarchy levels will utilize every field listed.

- **Name**. The official name of the organizational item. This is displayed wherever the item appears in Position Manager.
- **Hierarchy Type**. This displays which hierarchy level the selected item resides in - such as Facility, Department, etc.
- **Parent**. This field identifies where in your hierarchy structure the item resides.
- **Logo**. This allows you to upload a logo that represents the organizational entity in your hierarchy. It will also be used for child entities if they don't define their own logo. Supported file types are: .jpg, .gif, .png, .bmp, .img.
- **Active**. Determines if the hierarchy entity is active or not. You can only assign items and users to active entities in the hierarchy.
- **Code**. This field captures any special department or organizational code used by this area of your organization.
- **Budgeted FTEs**. Indicates how many Full Time Employees are associated with that part of your organization.
- **Street Address**, **City**, **State**, **Zip Code**. This refers to the physical location of the organizational item.
- **URL**. The website address, if any, for the organizational item.

- **Additional Information**. This is a multiple-line text field for including any notes regarding the organizational item.
- **Number of Positions**. This field shows how many positions the organizational item contains, both filled and open positions.

Searching for an Organization in the Hierarchy

A search feature is provided on the *Manage Hierarchy Organizations* page so you can quickly locate organizations in the tree structure.

1. From the main *Hierarchy Organizations* page, type in text to search against in the search field above the organization tree. You can enter part of the name of the organizational entity or the Code for an entity.
2. Click the **Find Next** button next to the search field. If the search string appears anywhere in the name of an organization, the tree will expand to that organization and highlight your search string.

You can scroll through all the organizations that match your search string by continuing to click the **Find Next** button.

Settings

The *Settings* page allows system administrators to control many aspects of user interaction with the Position Manager system. There are several sections for customizing client sites, each with its own set of options.

Job Posting

Job Posting options refer to requisitions that are ready to be posted as job openings on career sites.

- **Post Jobs Internally Default Days**. This setting determines the number of days a new job posting will reside on your internal career site before being sent to your organization and any other third-party external job boards.
- **Post Jobs Internally Enforce Default Days**. Checking this option forces all job postings to post on your internal site only for the number of days indicated in the previous option. Users will not be able to adjust the date in the **Post Internally Only Until** field when posting a job.
- **External Career Site**. Allows you to determine if the external career site associated with Position Manager displays all jobs or just ones assigned to the external site.
- **Internal Career Site**. Allows you to determine if the internal career site associated with Position Manager displays all jobs or just ones assigned to the internal site.

Password Settings

The options in the **Password Settings** section allow you to set password parameters for all users logging into

Position Manager. Maintaining strong password requirements (mixed-case passwords, numbers, special characters, etc.) helps ensure greater system security.

- **Minimum Password Length**. This setting determines how many characters long a user password must be in order for it to be valid. Options are 8, 12, 16, 24 and 32.
- **Password Reuse Count**. This setting determines how many passwords a user must utilize before they can reuse a previous password. Options are zero (0), meaning they can reuse the same password every time they reset their password, through eight (8), which means they will only be able to reuse a password after eight other *different* passwords have been entered into the system for their account.
- **Set Password Expiration**. Enter the number of days each user password will remain valid. Once a user's password reaches this set number of days, they will have to create a new password for the system the next time they log in.
- **Maximum Retry Attempts**. Select how many attempts a user will have to enter a correct password for their account before it is automatically locked. Options are one (1) through ten (10). A locked user account must be unlocked before they can access the system.
- **Require at least one capital letter**. Check this option to require at least one capital letter in a user password.
- **Require at least one numeric character**. Check this option to require at least one numeric character (0-9) in a user password.
- **Require at least one special character**. Check this option to require at least one special character in a user password. Special characters are symbols such as !, @ and #.

Reporting

The **Reporting** section contains an option that determines how many levels of your organization will appear in Reports (**# of Org Levels to display in reports**). The number you select from the available drop-down list for this option will determine how many levels of your organization are available as report parameters.

Requisition

The options in the Requisition section refer to the numbering of new requisitions in the system. Position Manager gives you the option to create your own requisition numbers or setting an automatic numbering system.

- **Requisition Number Assignment**. This is where you select either *Auto Generate* or *Manual Entry* for your new requisition numbers.
- **Requisition Start Number**. This option in only available if you select *Auto Generate* in the previous setting. The number you enter in this field sets the starting number for new requisitions.
- **Default Hiring Manager on Requisition**. This option applies to the Create Requisition wizard. When selected, this option ensures a default Hiring Manager is selected in step 3 of the requisition creation process (Req Details). If this option is not checked, the Hiring Manager field is left blank and the user will have to manually select one.

- **Requisition Approve Without Login Enabled**. Allows requisition approvers to approve requisitions by clicking a link in the email notification, without requiring them to log into Position Manager.

Applicant

The Applicant section has a few options used when working with applications in the system.

- **Include text box with comments**. Refers to sending manager comments for an applicant. When this option is checked, a multi-line text box is included for the user to enter additional comments.
- **Enable Tasks**. This option enables tasks as part of the Messages and Tasks area for an application.
- **SSN Visibility**. Determines if the full social security number for an applicant is hidden, or the first five (5) digits.

Onboarding

Options in the Onboarding section determine actions that occur during the process of hiring an applicant.

- **Preselect Onboarding Documents**. When onboarding an applicant, the system automatically chooses which documents are selected to be sent to the applicant based on the position in hierarchy for the position or the position title. The pre-selected documents can be modified at the time of onboarding.
- **Send New Hire Onboarding Email**. This option determines if an onboarding email to the applicant is necessary; and if so, if the email is required or optional.

Disposition

The **Collect Disposition Reason** option determines if the system tracks the reason an applicant was not hired for a position in order to meet OFCCP, AAP and other government regulations. The drop-down list has three options:

- **Yes - Enforced**. The system requires a disposition reason when an applicant is moved to a status of either "File – Not Hired" or "File – Not Hired Viable".
- **Yes - Optional**. The system requests a disposition reason when an applicant is moved to a status of either "File – Not Hired" or "File – Not Hired Viable".
- **No**. The system does not request a disposition reason.

Notifications

- **Notify Manager of Application**. The **Notify Manager of Application** section sets the method of delivery for applications sent to managers regarding applications in Position Manager.
  - **Default: Email Application**. This option sets the **Notification Method** to *Email Application*, but allows the user to select a different option from the list. *Email Application* means the selected user receives the application as an attachment to the email.

- **Default: Email Link**. This option sets the **Notification Method** to *Email Link*, but allows the user to select a different option from the list. *Email Link* means the selected user receives a link to the application in the body of the email.
- **Enforce: Email Application**. This option sets the **Notification Method** to *Email Application* and does not allow the users to change the option. *Email Application* means the selected user receives the application as an attachment to the email.
- **Enforce: Email Link**. This option sets the **Notification Method** to *Email Link* and does not allow the users to change the option. *Email Link* means the selected user receives a link to the application in the body of the email.
- **Applicant Apply Email**. Allows the Recruiter tied to the requisition to receive an email notification whenever an application is received for that requisition. This email is tied to the Applicant Email Reply communication template. This is a global setting and enables the Job Details setting on each requisition when a recruiter posts a position.
- **Message Reply Notification**. Check this option if you want notification emails sent when a user replies to another user's message and/or task for an applicant.
- **Batch Document Visibility**. This drop-down contains a list of available documents for an applicant. Check off which documents you wish to automatically be made visible to a user when sending an application for review.
- **Send Internal Application Email Reply**. When selected, this option sends the auto-reply email to internal applicants to a job posting.
- **Send External Application Email Reply**. When selected, this option sends the auto-reply email to external applicants to a job posting.
- **Email Application to Contact**. *Coming soon!*

Career Site

The options in the **Career Site** section determine whether or not an applicant is able to view the current status of their application. The table lists all available career sites linked to Position Manager. If the **Display Application Status** option is checked for a site, applicants are able to view the status of their submitted application.

3rd Party Authentication

Coming soon!

Editing Settings

Administrators can update client settings for the site at any time.

1. Open the *Settings* page from the **Admin** drop-down.
2. Make the necessary updates to the available options.
3. When you have finished updating the necessary information, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the information was successfully saved.

User Roles

Permissions for users in Position Manager are controlled through the use of user roles. System permissions are assigned to roles, then users added to those roles. The added users inherit the permission set for that role.

Roles also help determine if users appear in certain selection lists for recruiters and hiring managers.

Users can belong to multiple roles in the system. When users are assigned to roles with conflicting permission sets, the least restrictive set of permissions is applied.

The main *User Roles* page provides a table view of roles in the system. From this table, you can view basic information and perform actions on multiple roles at once.

Clicking the link under the **Name** column will take you to the *User Role Detail* page for the selected item, where you can view and adjust permission sets for the role.

Membership for user roles is controlled from the *Users* page. You can add a user to a role from the main *Users* page, or from their individual user account.

Adding a User Role

New user roles can be created at any time.

1. From the main *User Roles* page, click the **Add User Role** button. The *Select a System Role* pop-up opens.

   > **Note:** All roles in the system are associated with a System Role. These system roles determine if users in a role appear in the necessary selection lists for recruiters and hiring managers.

2. Select a system role from the drop-down list to associate the new role with and click the **OK** button. The *User Role Detail* page opens.
3. Type in a **Name** for the role.
4. Adjust the settings for the new role as necessary on the **Administration**, **Position Manager**, and **Reports** tabs.
5. When finished setting permissions, click the **Save** button under the permissions table.

After the **Save** button is clicked, the page reloads and displays a message stating the role was successfully added. You can now visit user profiles and add users to the role.

Copying a User Role

You can copy an existing user role to create a new one in Position Manager. The new role is created with the same set of permissions as the original role.

1. From the main *User Roles* page, click the link under the "Name" column for the user role you want to copy. The *User Role Detail* page opens for the selected role.

2. Select the *Copy Role* option from the **Take Action** drop-down list. The page reloads, displaying the same set of privileges but a blank **Name** field.

3. Type in a **Name** for the role.

4. Adjust the settings for the new role as necessary on the **Administration**, **Position Manager**, and **Reports** tabs.

5. When finished setting permissions, click the **Save** button under the permissions table.

After the **Save** button is clicked, the page reloads and displays a message stating the role was successfully added. You can now visit user profiles and add users to the role.

Editing a User Role

User roles can be edited at any time to update permission sets.

1. From the main *User Roles* page, locate the user role you wish to update from the table.

2. Click the link for the user role under the "Name" column. This will open the *User Role Detail* page.

3. Make the necessary updates to the available permission options.

4. When finished making necessary updates, click the **Save** button under the permissions table.

After the **Save** button is clicked, the page reloads and displays a message stating the role was successfully updated.

Permission updates immediately take effect in the system for the role. If a user is currently logged into the system, the updated permissions take effect the next time they log into the system.

Pre-defined Roles

Every Position Manager system includes six pre-defined roles, each with a set of permissions tailored to their typical job function within the system:

- **Recruiter**. The Recruiter role has wide-ranging access to the system due to their heavy involvement in the complete job posting and hiring process. Though limited by their Area of Responsibility and Position in Hierarchy, this role has full access to requisitions and applicants.

- **Hiring Manager**. The Hiring Manager role is focused on applicants since their main responsibility is to review candidates to fill positions. Access to requisitions is limited.

- **Requisition Approver**. The Requisition Approver role has a primary job function of reviewing and approving submitted requisitions. This role has no access to applicants.

- **Onboarding Router**. *Coming soon!*

- **Administrator**. Administrators have full access to the system and can perform any function in all areas. Their access to Requisitions and Applicants is still limited by their Area of Responsibility and Position in Hierarchy.

- **General**. The General role provides view-only access to Requisitions, Job Postings, and Applicants. It also has full access to the **Reports** tab.

The specific permissions assigned to each pre-defined role are detailed below.

Recruiter

Administration tab

The Recruiter role has **no access** to any Administration permissions.

Position Manager

The Recruiter role has **full access** to all permissions under the Position Manager tab (Dashboard, Job Postings, Applicants, Requisitions).

Reports

The Recruiter role has **full access** to all permissions for Reports.

Hiring Manager

Administration tab

The Hiring Manager role has **no access** to any Administration permissions.

Position Manager

Permissions granted to the Hiring Manager role under the **Position Manager** tab (*Dashboard*, *Job Postings*, *Applicants*, *Requisitions*) are detailed in the table below.

Area	Permission	Area of Responsibility	Position in Hierarchy	My Own
Job Postings	View Postings	✔	✔	✔
	Add	x	x	x
	Edit	x	x	x
	Delete	x	x	x
	Expire Posting	x	x	x
Applicant Management	View Applicants tab	✔	✔	✔
	Add	x	x	x
	Edit Contact Info	x	x	x
	Save/Send Document	✔	✔	✔

Area	Permission	Area of Responsibility	Position in Hierarchy	My Own
	Print Document	x	x	x
	Batch Print Applications	x	x	x
	Email Document	x	x	x
	Edit Document	x	x	x
	Reassign	x	x	x
	Attach Documents	x	x	x
	Delete Applications	x	x	x
	Delete Documents	x	x	x
	Change Status	x	x	x
	Send Custom Form	x	x	x
	Send HM Comments	x	x	x
	Remove Visibility	x	x	x
	Manager Notification	x	x	x
	New Hire	x	x	x
	Edit New Hire	x	x	x
	Create Notes	x	x	x
	Edit Notes	x	x	x
	Delete Notes	x	x	x
	View Communications	✓	✓	✓
	Document Tab	✓	✓	✓
	History Tab	x	x	x
	View Notes	x	x	x
	Add HM Comments Message	✓	✓	✓
	Edit HM Comments Message	x	x	x
	View Ranking of Users			
	Mark All Tasks Complete			
	View Full SSN			
Requisitions	View Requisitions tab	✓	✓	✓

Area	Permission	Area of Responsibility	Position in Hierarchy	My Own
	Add	✔	✔	✔
	Edit	✔	✔	✔
	Edit Non-Approved Reqs Only			
	Edit Approver	✔	✔	✔
	Delete	✔	✔	✔
	Approve	✘	✘	✘
	Attach Document	✔	✔	✔
	Delete Documents	✔	✔	✔
	Print	✔	✔	✔
	Resend for Approval	✔	✔	✔
	Reassign Approver			
	Reassign Recruiter			
	Copy	✔	✔	✔
	Change Status	✘	✘	✔
	Self Approve	✘	✘	✘
	Create Note			
	Delete Note			
	View Note			

Reports

The Hiring Manager role has **no access** to any permissions for Reports.

Requisition Approver

Administration tab

The Requisition Approver role has **no access** to any Administration permissions.

Position Manager

Permissions granted to the Requisition Approve role under the **Position Manager** tab (*Dashboard*, *Job Postings*, *Applicants*, *Requisitions*) are detailed in the table below.

Area	Permission	Area of Responsibility	Position in Hierarchy	My Own
Job Postings	View Postings	x	x	x
	Add	x	x	x
	Edit	x	x	x
	Delete	x	x	x
	Expire Posting	x	x	x
Applicant Management	View Applicants tab	x	x	x
	Add	x	x	x
	Edit Contact Info	x	x	x
	Save/Send Document	x	x	x
	Print Document	x	x	x
	Batch Print Applications	x	x	x
	Email Document	x	x	x
	Edit Document	x	x	x
	Reassign	x	x	x
	Attach Documents	x	x	x
	Delete Applications	x	x	x
	Delete Documents	x	x	x
	Change Status	x	x	x
	Send Custom Form	x	x	x
	Send HM Comments	x	x	x
	Remove Visibility	x	x	x
	Manager Notification	x	x	x
	New Hire	x	x	x
	Edit New Hire	x	x	x
	Create Notes	x	x	x
	Edit Notes	x	x	x
	Delete Notes	x	x	x
	View Communications	x	x	x
	Document Tab	x	x	x
	History Tab	x	x	x

Area	Permission	Area of Respons-ibility	Position in Hier-archy	My Own
	View Notes	x	x	x
	Add HM Comments Mes-sage	x	x	x
	Edit HM Comments Mes-sage	x	x	x
	View Ranking of Users			
	Mark All Tasks Complete			
	View Full SSN			
Requisitions	View Requisitions tab	✔	✔	✔
	Add	x	x	x
	Edit	✔	✔	✔
	Edit Non-Approved Reqs Only			
	Edit Approver	✔	✔	✔
	Delete	x	x	x
	Approve	✔	✔	✔
	Attach Document	x	x	x
	Delete Documents	x	x	x
	Print	✔	✔	✔
	Resend for Approval	✔	✔	✔
	Reassign Approver			
	Reassign Recruiter			
	Copy	x	x	x
	Change Status	x	x	x
	Self Approve	x	x	x
	Create Note			
	Delete Note			
	View Note			

Reports

The Requisition Approver role has **no access** to any permissions for Reports.

Onboarding Router

Coming soon!

Administrator

The Administrator role has **full access** to all permissions for **all areas** of the system.

General

Administration tab

The General role has **no access** to any Administration permissions.

Position Manager

Permissions granted to the General role under the **Position Manager** tab (*Dashboard*, *Job Postings*, *Applicants*, *Requisitions*) are detailed in the table below.

Area	Permission	Area of Responsibility	Position in Hierarchy	My Own
Job Postings	View Postings	✔	✔	✔
	Add	x	x	x
	Edit	x	x	x
	Delete	x	x	x
	Expire Posting	x	x	x
Applicant Management	View Applicants tab	✔	✔	✔
	Add	x	x	x
	Edit Contact Info	x	x	x
	Save/Send Document	x	x	x
	Print Document	x	x	x
	Batch Print Applications	x	x	x
	Email Document	x	x	x
	Edit Document	x	x	x
	Reassign	x	x	x
	Attach Documents	x	x	x

Area	Permission	Area of Responsibility	Position in Hierarchy	My Own
	Delete Applications	x	x	x
	Delete Documents	x	x	x
	Change Status	x	x	x
	Send Custom Form	x	x	x
	Send HM Comments	x	x	x
	Remove Visibility	x	x	x
	Manager Notification	x	x	x
	New Hire	x	x	x
	Edit New Hire	x	x	x
	Create Notes	x	x	x
	Edit Notes	x	x	x
	Delete Notes	x	x	x
	View Communications	x	x	x
	Document Tab	x	x	x
	History Tab	x	x	x
	View Notes	x	x	x
	Add HM Comments Message	x	x	x
	Edit HM Comments Message	x	x	x
	View Ranking of Users			
	Mark All Tasks Complete			
	View Full SSN			
Requisitions	View Requisitions tab	✓	✓	✓
	Add	x	x	x
	Edit	x	x	x
	Edit Non-Approved Reqs Only			
	Edit Approver	x	x	x
	Delete	x	x	x

Area	Permission	Area of Responsibility	Position in Hierarchy	My Own
	Approve	x	x	x
	Attach Document	x	x	x
	Delete Documents	x	x	x
	Print	x	x	x
	Resend for Approval	x	x	x
	Reassign Approver			
	Reassign Recruiter			
	Copy	x	x	x
	Change Status	x	x	x
	Self Approve	x	x	x
	Create Note			
	Delete Note			
	View Note			

Reports

The General role has **full access** to all permissions for Reports.

User Role Detail

The *User Role Detail* page in Position Manager is where administrators manage permission sets for user roles.

The *User Role Detail* page provides a table view of permission sets in Position Manager. The table is broken down into three main tabs:

- **Administration**. The Administration tab controls permission sets for system areas that reside under the **Admin** tab (items such as *Users*, *Questionnaires*, *Templates/Fields*, etc.).

- **Position Manager**. The Position Manager tab controls permissions for the Position Manager modules: **Job Postings**, **Applicant Management**, **Requisitions**, and **Dashboard**.

- **Reports**. The Reports tab controls permissions for viewing reports found on the **Reports** tab in Position Manager. The items listed refer to report groups, not individual reports.

Users

The *Users* page allows system administrators to manage existing and add new users in Position Manager.

The main *Users* page provides a table view of user accounts in the system. From this table, you can view basic information and perform actions on multiple accounts at once.

Clicking the link under the "Name" column will take you to the *User Detail* page for the selected item.

The Users table can be filtered using the **Search** panel to the left of the page. There is also a **Recent Users** area under the panel that provides a list of recently accessed user accounts.

The main table can be sorted by clicking on any of the available column headings.

Clicking the "**+**" (plus symbol) next to a user account in the table will expand the table entry and display the User Role(s) that person is assigned to.

User Detail

The *User Detail* page lists detailed information for user accounts in Position Manager. Administrators can edit contact information as well as user Roles and Groups.

There are several options available for each user in the system.

- **Status**. This determines if the user is Active (able to log into the system) or Inactive.
- **First Name**. User's first name.
- **Middle Name**. User's middle name.
- **Last Name**. User's last name.
- **Title**. User's professional title at the organization.
- **Email**. User's email address.

- **Phone**. User's phone number.
- **Fax Number**. User's fax number.
- **Address fields**. User's address (Street, City, State, Zip).
- **Username**. User's username. This is what is used when logging into the system.
- **User Roles**. The User Roles option determines the user's permissions in Position Manager. Also, when a user is assigned to a particular role, they will appear in certain drop-down lists in the system.
- **Title Category**. A required field when Approver User Role is in use.
- **Reports To**. Informational field that displays the user's manager.
- **Position in Hierarchy**. Position in Hierarchy identifies where in your organizational structure the user resides. The selection made in this field determines what information a user has access to in the system.
- **Areas of Responsibility**. The Areas of Responsibility menu indicates which areas of your organization the user will have access to. There are no limits to the number of selections that can be made from this list.

Searching for Users

Searching for users in the system provides administrators quick access to make necessary updates.

1. From the main *Users* page, locate the **Search** area in the column on the left of the page.
2. Using the available search fields, select values for the criteria you wish to search against. You can use one or more of the fields for your search.
3. Click the **Search** button to perform the search with the entered variables.

After the **Search** button is clicked, the Users table reloads and displays the results of the search.

Alternate Search Methods

Users that have recently been accessed can be reached by selecting them from the **Recent Users** area under the search panel on the left of the screen.

Adding a User

New users can be created at any time.

1. From the main *Users* page, click the **Add User** button. The *User Detail* page will open.
2. Complete the user detail form as necessary.
3. When finished entering necessary details for the user, click the **Save** button. A pop-up window will open asking if you want to send the user a password token.
4. Select **OK**.

After the **OK** button is clicked, the page reloads and displays a message stating the user was successfully added. An email is immediately sent to the email address for the new user that contains instructions on how to create a password for the system.

Editing a User

User details can be updated by system administrators (or other users with necessary privileges) at any time.

1. From the main *Users* page, locate the user you wish to update from the table. You can either search for a specific user or browse all users in the table.
2. Click the link for the user under the "Name" column. This will open the *User Detail* page.
3. Make the necessary updates to the available options.
4. When you have finished entering the necessary information for the user, click the **Save** button to complete the process.

After the **Save** button is clicked, the system displays a message stating the user details were successfully saved. Updates are immediately reflected in the system.

Assigning User Roles

Administrators can update the roles that a user is assigned to at any time. Roles determine a user's permissions through-out Position Manager.
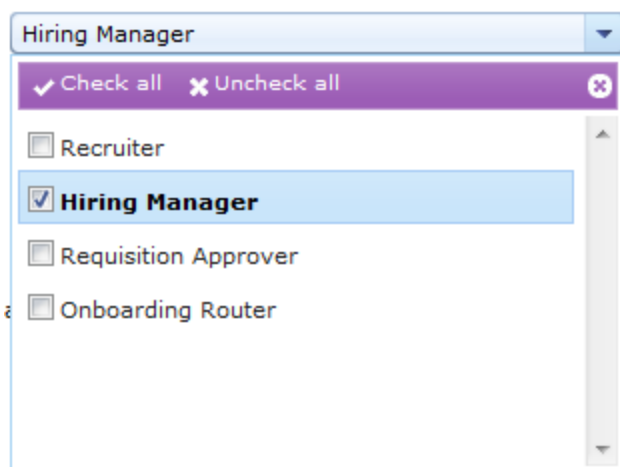
1. From the main *Users* page, locate the user you wish to update from the table. You can either search for a specific user or browse all users in the table.
2. Click the link for the user under the "Name" column. This will open the *User Detail* page.

3. From the **User Role(s)** drop-down list, select role(s) for the user.

> **Note:** There is no limit to the number of options that can be selected from the **User Role(s)** list.

4. When you have finished entering the necessary information for the user, click the **Save** button to complete the process.

After the **Save** button has been clicked, the system displays a message stating the user details were successfully saved. User access based on updated role assignments is applied the next time the user logs into the system.

Resetting a User Password

Occasionally a user will forget their password and cannot log into Position Manager. When this occurs, administrators can send a Password Token to that user via email which will allow them to create a new password and log into the system.

1. From the main *Users* page, locate the user from the table. You can either search for a specific user or browse all users in the table.
2. Click the link for the user under the "Name" column. This will open the *User Detail* page.
3. From the **Take Action** drop-down list, select the *Send Password Token* item.

After *Send Password Token* is selected, the page reloads and a message displays stating a password token was successfully sent. The selected user receives an email that contains a link which will allow them to create a new password.

Unlocking a User

If a user unsuccessfully enters their password three times, the system automatically locks their user account. This means they require a new password token email before they are able to access Position Manager.

The system provides users with the means to request the password token email on their own, either by the warning message that's displayed after their final unsuccessful attempt to login in, or by using the **Forgot Password** link on the login page.

However, if the user forgoes those methods and contacts the system administrator, the following procedure will also provide the necessary password token email.

1. From the main *Users* page, locate the user from the table. You can either search for a specific user or browse all users in the table.
2. Click the link for the user under the "Name" column. This will open the *User Detail* page.
3. From the **Take Action** drop-down list, select the *Send Password Token* item.

After *Send Password Token* is selected, the page reloads and a message displays stating a password token was successfully sent. The user receives an email that contains a link which will allow them to create a new password.

More about users

User Position In Hierarchy

The **Position in Hierarchy** field on the *User Detail* page identifies where in your organization the user resides. This can refer to a department, facility, location, etc. The selection made in this field determines what information a user has access to in the system.

> **Example:** A Hiring Manager resides in Department A. When they create a requisition, they will not see requisition templates or job titles from Department B, nor can they create a requisition in that other department.

Only one (1) selection can be made in the **Position in Hierarchy** field. If the user requires access to other areas of your organization, this is controlled by the **Areas of Responsibility** field.

> **Note:** Position in Hierarchy **does not** control permissions in Position Manager. Permissions are controlled by User Roles.

User Reports To

The **Reports To** field on the *User Detail* page determines that user's direct manager. This information is used to define automated approval workflows in Position Manager, eliminating the need to manually select the next approver in line when reviewing requisitions in the system.

Only one (1) selection can be made in the **Reports To** field.

> **Note:** The automated approval workflows in Position Manager are under development and will be delivered in future releases. We recommend completing this field whenever possible in preparation for delivery of automated workflows.

User States

When a user is added to the system, you can manually determine if that user is Active or Inactive. Once a user is made Active (able to log into the system), there is a series of states the user is automatically moved to as they use their account.

The available states for a user are defined below. All the listed states occur when a user is in an Active status.

- **New**. New users have just been added to the system. They have not been sent a password token email.
- **Pending**. Pending users have been sent a password token email, but have yet to create a password and access the system.
- **Confirmed**. Confirmed users have used the password token to create a password and log into the system.
- **Locked Out**. Locked Out users have incorrectly entered their password a set number of times (as controlled on the *Settings* page), or have failed to correctly answer security questions for their account.

User Areas Of Responsibility

The **Areas of Responsibility** field on the *User Detail* page sets the areas of your organization the user will have access to in addition to their own position in the hierarchy. This can refer to a department, facility, location, etc. Multiple selections can be made from this list, allowing the user to have access to multiple areas of your organization.

> **Example:** A Recruiter in your organization may officially reside in the Human Resources depart-
> ment. However, they are responsible for managing the hiring process for multiple areas outside
> of Human Resources. By adding those additional areas in the **Areas of Responsibility** field, the
> Recruiter will be able to access information from those other areas.

> **Note:** Areas of Responsibility **does not** control permissions in Position Manager. Permissions are controlled by
> User Roles.

Support

If you have additional questions regarding HealthcareSource solutions, please contact our Support department at the information listed below.

Online: HealthcareSource Community Solutions is the destination for you to request product support, browse our knowledgebase of articles for self-help and best practices, access product information, and collaborate and interact with both HealthcareSource staff and fellow users of our solutions. Learn more

Email: pmsupport@healthcaresource.com

Phone: 1-800-869-5200