

Quick Start Guide

Creating Requisitions (Hiring Managers)

symplr Recruiting provides two ways to create requisitions: start from scratch, or copy an existing requisition. Both methods provide an easy-to-use wizard that walks you through the requisition creation process.

Creating a Requisition

Creating a requisition from scratch is started by clicking the **Add Requisition** button from the main *Requisitions* page. This launches the wizard, taking you step-by-step through the process to ensure all necessary data is collected for the new requisition. All the available steps are displayed on the left side of the wizard window.

Note: *The steps available in the wizard are controlled by overall system settings and user permissions. Below are all the possible steps, though not all these steps may be available due to your organization's preferences.*

1. **Select Organization.** Select the specific area of your organizational structure where the opening resides. This determines which job templates are available in the next step.

Check the box next to the entity in your organizational hierarchy for the new requisition. You can either browse the tree structure or perform a search by entering part of an Organization Name or Code into the text field and clicking the **Find Next** button.

Note: *Available departments displayed in this step are controlled by system permissions, so you may not have access to all departments. If you only have access to one department, it is automatically selected.*

2. **Select Template.** This determines the specific job for your vacancy. The template selected here pre-populates the Requisition Detail form in the next step.

Check the box next to the job template you wish to use for the new requisition. You can either browse the list of available templates or perform a search the **Job Code**, **Position Title**, and **Job Category** fields.

Job Code	Position Title	Category	Organization
<input type="checkbox"/> 319923	Nurse - RN	Nursing/Nursing Support	Acute Therapy Services
<input checked="" type="checkbox"/> 313398	Nurse Resident RN	Nursing/Nursing Support	Acute Therapy Services

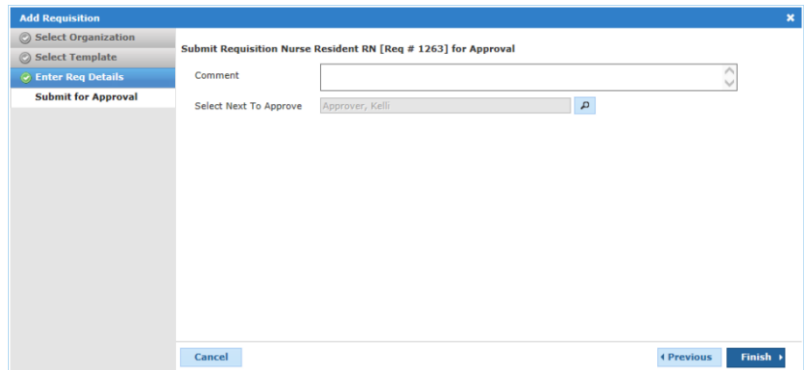
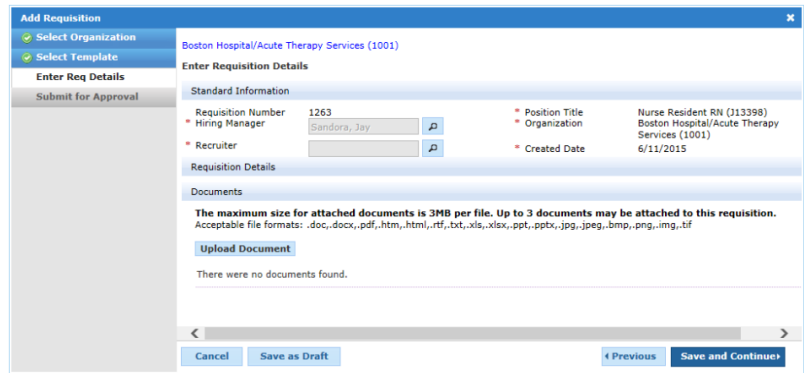
3. **Enter Req Details.** The form presented in this step contains all the details of the job vacancy. Certain fields may already contain data based on the job template that was selected in the previous step.

Requisition Detail forms are customizable, so the fields available vary from client to client. Required fields on the form are marked with a red asterisk (*).

Note: The **Hiring Manager** and **Recruiter** fields must be completed if you wish to save the requisition as a **Draft**.

4. **Submit for Approval.** The Approval step determines who needs to review and approve the requisition before it can be posted to job boards. This step only appears if your organization requires approvals before posting jobs.

To submit the requisition for approval, simply select the next user that needs to approve the requisition and click the **Finish** button in the wizard. The wizard window closes and the requisition is sent to the selected user for review. The selected user receives an email notification that there is a new requisition for them to review.



Copying a Requisition

Existing requisitions can be copied to create new requisitions using the same data. This helps speed up the process when creating new requisitions that are similar to ones already in the system.

You may copy a requisition in any status; however, the new requisition you create will begin in the **Draft** status, just as if you were creating it from scratch.

What gets copied?

When copying a requisition, all the fields for the requisition are carried over to the new copy. This includes all fields found in the **Basic Data** and **Requisition Details** section of the *Requisition Detail* page. Additionally, any documents attached to the original requisition are also copied over. Notes are **not** included in the copy process.

When copying a requisition, you are placed into the Create Requisition wizard used when creating new requisitions. The only difference is that the wizard opens up to Step 3 (**Enter Req Details**), and the *Req Details* form is pre-populated with information from the original requisition.

1. Open the *Requisition Detail* page by clicking the position title for the requisition you wish to copy.
2. Select the Copy option from the **Take Action** drop-down list. The page reloads and a pop-up window opens to Step 3 (**Enter Req Details**) of the Create Requisition wizard.
3. Complete the wizard as you would for a new requisition.

Note: The **Position Title** and **Department** is carried over from the previous requisition when copying and cannot be changed in the new requisition.

Completing the requisition process is the same for new and copied requisitions. After the **Submit for Approval** or **Save** button is clicked, the page reloads and displays a message stating the requisition was successfully submitted (or saved).

The user selected to review the requisition receives an email notification informing them of the new requisition that requires their approval.

