

Quick Start Guide

Creating Requisitions (HR users)

symlr 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.

The screenshot shows the 'Add Requisition' wizard window. The left sidebar has a vertical menu with steps: 'Select Organization' (highlighted), 'Select Template', 'Enter Req Details', 'Submit for Approval', and 'Post Job'. The main area is titled 'Select Organization' and contains a search box and a 'Find Next' button. Below the search box is a tree view of organizational structure. The tree is expanded to show 'Boston Clinic (FacCode1)' with sub-items: 'ADMINISTRATION - EXEC', 'Neurology (Code)' (checked), 'SCRI-ADMINISTRATION', 'SIH-NURSING1 ADMINISTRATION', 'Surgical (Code)', 'test', and 'Testing_Hierarchy'. Below the tree are 'Boston Hospital (Code)' and 'Boston Hospital (Lenora)' with sub-item 'Fac new'. At the bottom are 'Cancel' and 'Next' buttons.

2. **Select Template.** This determines the specific job for your opening. 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.

The screenshot shows the 'Add Requisition' wizard window at the 'Select Template' step. The left sidebar menu is the same as in the previous screenshot. The main area is titled 'Select a job template to use for this requisition.' It features search fields for 'Job Code', 'Position Title', and 'Job Category' (set to 'Patient Care Services'). A 'Search' button is to the right. Below the search fields is a table of job templates:

Job Code	Position Title	Category	Organization
<input checked="" type="checkbox"/>	Radiology Professional	Patient Care Services	Neurology

At the bottom of the table area are navigation controls: 'Page 1 of 1', 'Displaying items 1 - 1 of 1', and 'Previous'/'Next' buttons. 'Cancel' and 'Next' buttons are also present at the bottom of the window.

- 3. Enter Req Details.** The form presented in this step contains all the details of the job opening. Certain fields may already contain data based on the job template 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 (*).

- 4. Pre-Qual Questions.** This step allows the selection and editing of a pre-qualification questionnaire for the requisition. A pre-qualification questionnaire may be pre-selected based on the job template selected in an earlier step.

Once a selection is made from the drop-down, edits can be made to the individual items in the questionnaire, including both questions and answers available for applicants. Additionally, a Rejection Message can be selected, which is displayed to applicants that do not meet the necessary requirements for the opening.

Seq #	Question Text	Answer Type
1	Question-A	Radio Buttons
2	Question-B	Radio Buttons
3	Question-C	Radio Buttons

- 5. Ranking Questions.** Similar to the previous step, this allows the inclusion and editing of a ranking questionnaire for the requisition. A questionnaire may already be selected based on the job template used for the requisition, and edits can be made to questions and answers once a questionnaire has been selected.

Seq #	Question Text	Answer Type	Required	Weight	Score %
1	Question-A RadioButtons	Radio Buttons	Yes	1	50.00 %
2	Question-B CheckBox	Check Boxes	Yes	1	50.00 %

6. **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.

Some options allow for the immediate completion of the approval process, which allows the job to be posted in the next step of the wizard. Selecting the **Approval Complete** option allows you to post the job in the next step of the wizard. However, not all users have the necessary permissions to perform this action, so the wizard may not even display the **Post Job** step.

7. **Post Job.** The final step in the requisition creation workflow involves posting the job to available job boards. After this step, you can begin collecting applications.

The form presented in this step is the same one used when posting jobs from other areas of Position Manager. Simply complete all the necessary sections of the job posting form and click **Post Job** to finish the process.

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.

