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CCI Online Management System (OMS) Documentation

Section: HR

1.1.Getting Started

To access the Human Resources section of the CCI Online Management System, begin by logging into the CCI Online Management System (www.ccioms.org) using an Internet Explorer browser.

Once you've successfully logged in, hover your mouse cursor over the **HR** tab in the global navigation to access the Human Resources drop-down menu. From here, you can select any of the available options to perform that function (see Figure 1).

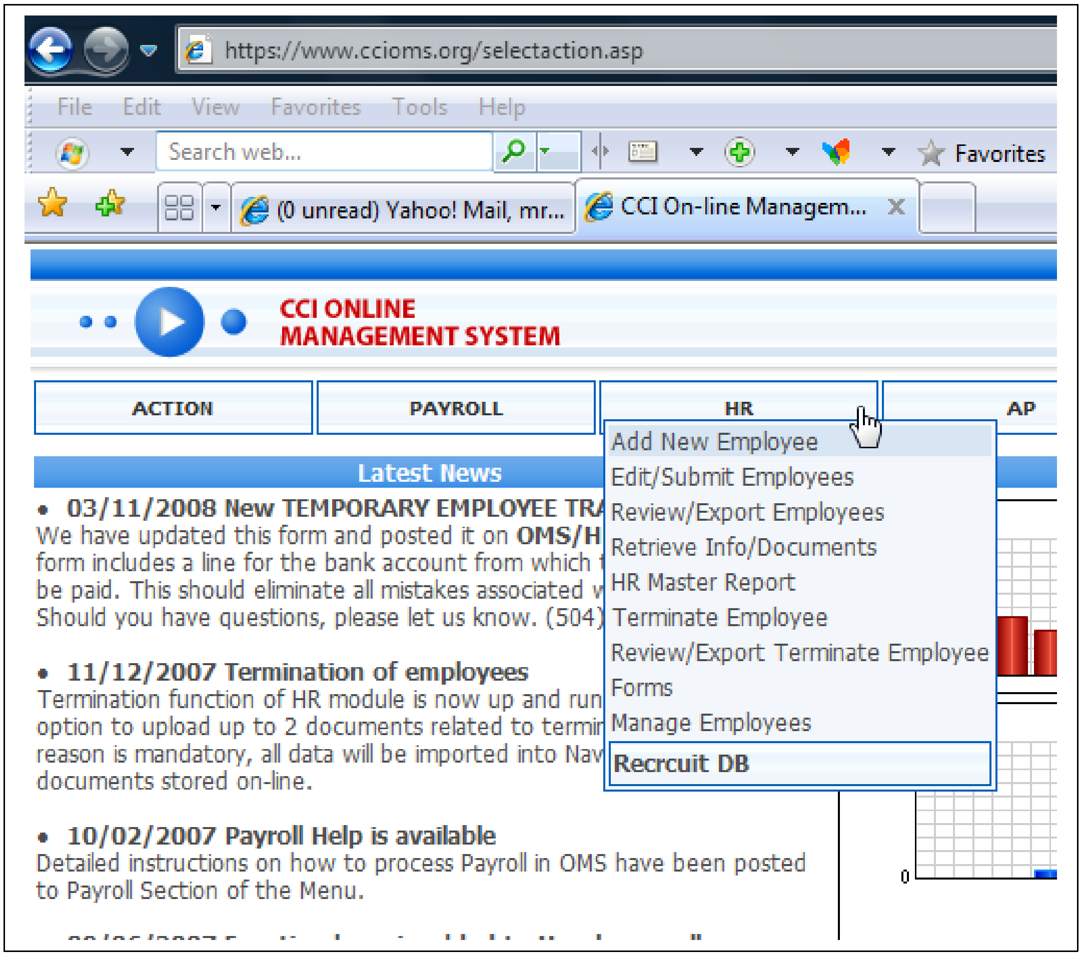

Figure 1 - HR Menu

1.2.Adding a New Employee

To add a new employee to the system, begin by selecting the **Add New Employee** menu option from the **HR** drop-down menu (Figure 2):

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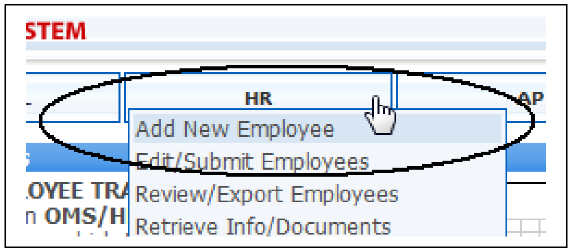

Figure 2 - Add New Employee menu option

This will launch the **New Hourly Employee Info** screen, as shown in Figure 3.

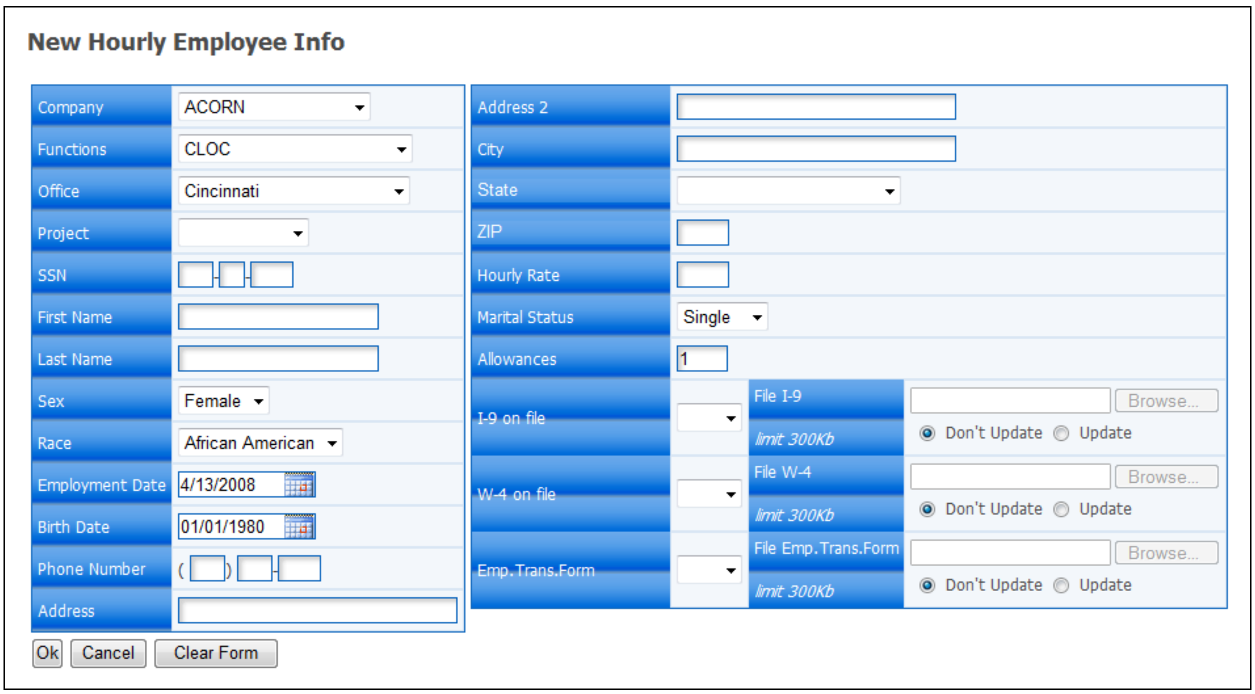

Figure 3 - New Hourly Employee Info screen

Enter all relevant information into each field, as specified below. All bolded field names are required.

Company	From the provided drop-down menu, select the name of the company for which you are entering the new employee (i.e. Acorn, Acorn Canada, CCI, etc.)
Functions	Select the specific sector for which the new employee will be working (i.e. Field Operations, Voter Registration, etc.).
Office	Select the location city of the office where the new employee is based.
Project	Select the specific project to which the employee will be assigned.
SSN	Enter the employee's Social Security Number, to be used for tax

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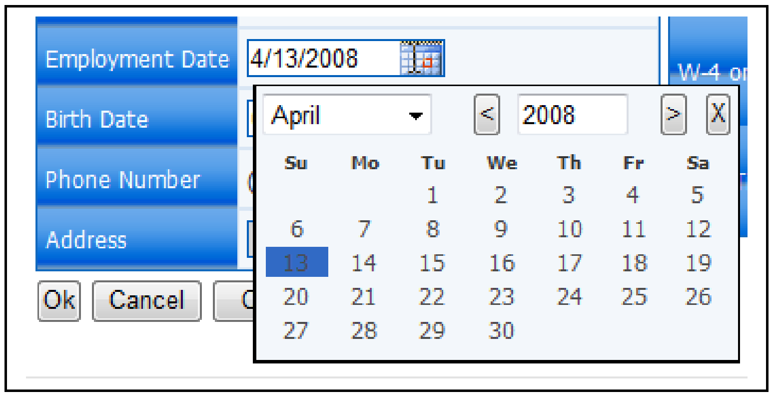
	purposes. A standard 9-digit format is required, and cannot start with 8 or 9.
First Name	Enter the first name of the new employee.
Last Name	Enter the last name of the new employee.
Sex	Select the gender of the new employee.
Race	Select the race of the new employee.
Employment Date	Select the starting date of employment. A pop-up calendar is provided for your convenience (Figure 4).  **Figure 4 - Calendar**
Birth Date	Select the employee's date of birth. A pop-up calendar is provided for your convenience.
Phone Number	Enter the phone-number of the employee, including area code.
Address	Enter the employee's street address. An optional second line is provided.
City	Enter the name of the employee's city.
State	Select the name of the employee's state from the drop-down menu.
Zip	Enter the employee's zip code.
Hourly Rate	Enter the hourly rate of the employee's compensation. The minimum hourly rate is $5.15 per hour. Be sure to enter decimals as necessary.
Marital Status	Select the employee's marital status (Single or Married).
Allowances	Enter the number of dependents the new employee is eligible to claim. If there are no dependents, enter 0.
I-9 on File	Select **Yes** or **No** to indicate whether the employee will have an I-9 form on file verifying that the employee is a United States citizen or is authorized to work in the United States. Employers are required to verify this employment eligibility for every employee hired.
File I-9	If you've selected **Yes** for the **I-9 on File** field, the **File I-9** field becomes available. Click **Browse** to select the correct I-9 form from your file browser, then select the **Update** radio button to update the form in the HR system.
W-4 on File	Select **Yes** or **No** to indicate whether the employee will have a W-4 form on file specifying their income tax withholding preferences.

File W-4	If you've selected **Yes** for the **W-4 on File** field, the **File I-9** field becomes available. Click **Browse** to select the correct W-4 form from your file browser, then select the **Update** radio button to update the form in the HR system.
Emp. Trans. Form	Select **Yes** or **No** to indicate whether the employee will have an Employee Transfer form on file.
File Emp. Trans. Form	If you've selected **Yes** for the **Emp. Trans. Form** field, the **File Emp. Trans. Form** field becomes available. Click **Browse** to select the correct Employee Transfer form from your file browser, then select the **Update** radio button to update the form in the HR system.

Click **OK** to add the new employee to the queue.

To complete submission of the new employee, you must select the **Edit/Submit** option from the **HR** menu (see section **1.2**).

1.3.Editing & Submitting Employees

Once you have added a new employee to the system, you can modify the employee's information and/or submit the employee to the HR database by selecting the **Edit/Submit Employees** menu option from the **HR** drop-down menu (Figure 5):

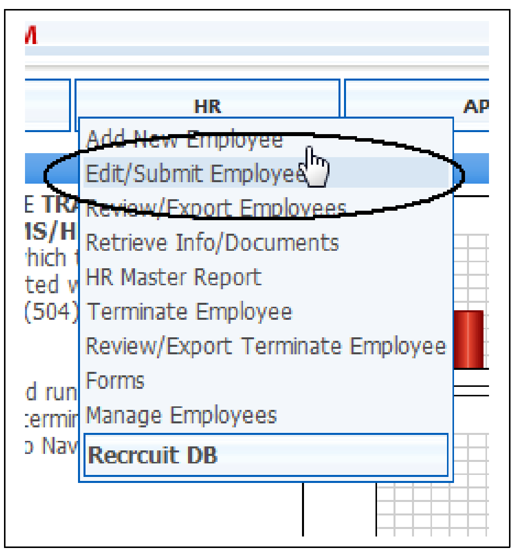


Figure 5 - Edit/Submit Employee

The **Employees** screen appears with the **Company** drop-down menu. Select the company with which the existing employee is associated.

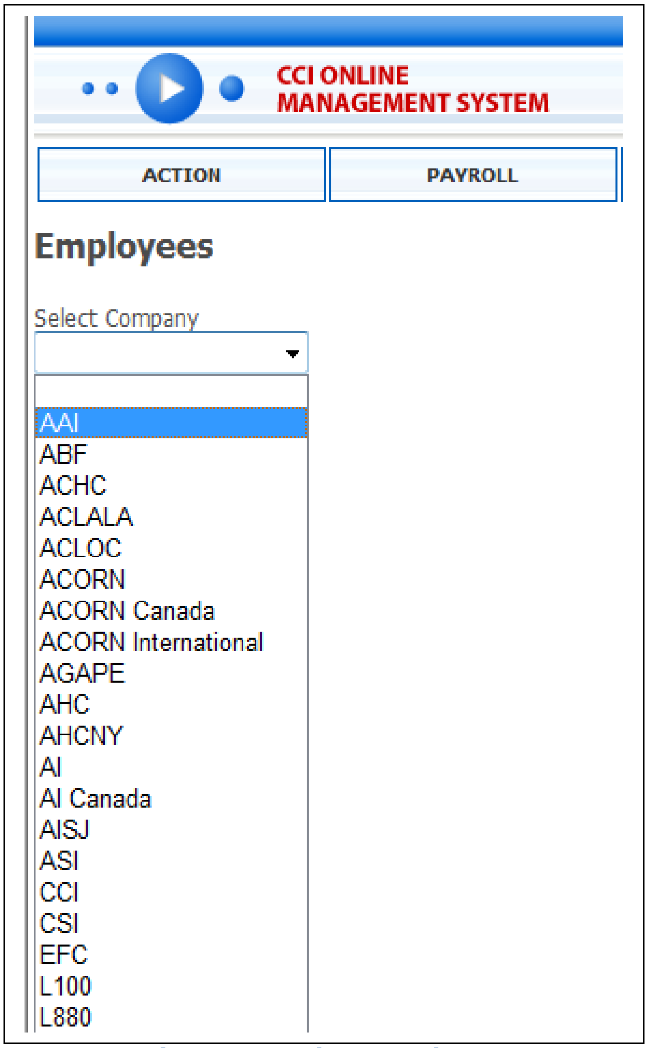
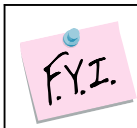


Figure 6 - Select employee

Once you've selected a company, the screen will refresh and display the **City** drop-down menu. Select the city with which the new employee is associated.



If no employees have been entered for the selected company, no cities will appear in the drop-down menu.
The number in parentheses next to each city indicates how many employees have been entered for that city.

After selecting the city, the screen will refresh to display a listing of all employees that have been entered for that city, along with the detailed information for each employee.

1.3.1 Editing Employee Information

To make changes to an employee's information, click the Edit button (Figure 8).

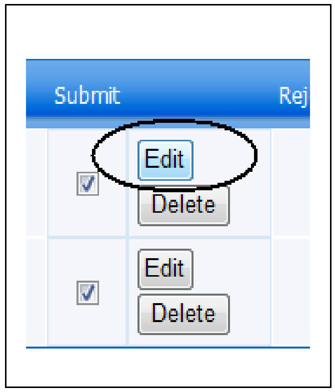


Figure 7 - Edit button

The **Hourly Employee Data** screen appears, allowing you to make any necessary changes.

When you have finished making edits, click **OK** to save your changes.

1.3.2 Submitting New Employees

After entering a new employee's information into the OMS, the employee must be submitted to the HR department to initiate a new hire packet. To submit a new employee, begin by selecting the Submit check-box next to the employee listing (see Figure 10).

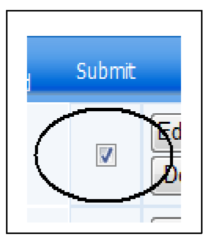


Figure 8 - Submit check-box

More than one employee record can be submitted at once. Select as many check-boxes as you'd like.
Once an employee has been submitted, the **Submit** checkbox will no longer appear for that employee.

Next, click the **Submit** button at the bottom of the employee listing.

1.3.3 Deleting Employees

After entering a new employee's information into the OMS, you can delete the employee listing at any time. To delete an employee, click the Delete button next to the employee listing (see Figure 12).

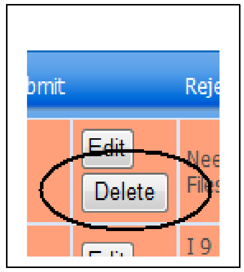


Figure 9 - Delete button

The employee will no longer appear as a listing for that company and city combination.

1.3.4 Exporting Employee Information to Excel

The OMS makes it easy to view, modify, and email employee details in a spreadsheet format. From the screen that displays all of the employee details, simply click the View Employees in Excel button below the listings.

A dialog window appears, prompting you to open or save the file to a specified location:

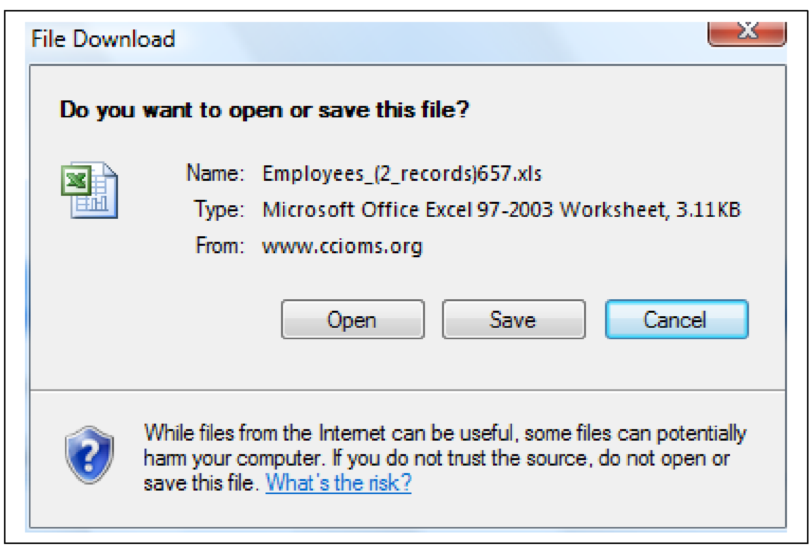


Figure 10 - Open or save Excel file

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1.4.Reviewing & Exporting Employees

Once you have added and submitted new employee to the system, you can review or export the employee information by selecting the **Review/Export Employees** menu option from the **HR** drop-down menu (Figure 15):

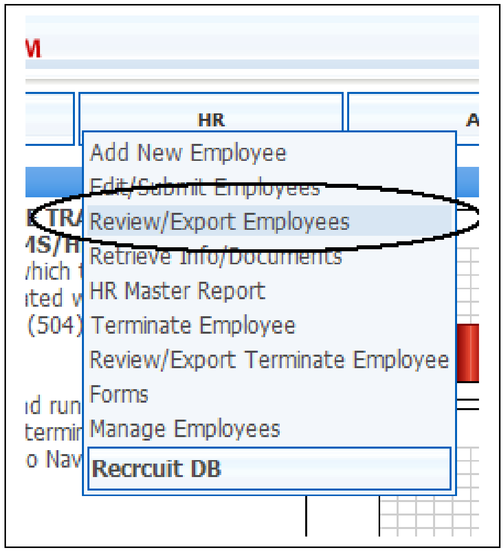

Figure 11 - Review/Export menu option

The **Employees** screen appears with the **Company** drop-down menu. Select the company with which the existing employee is associated.

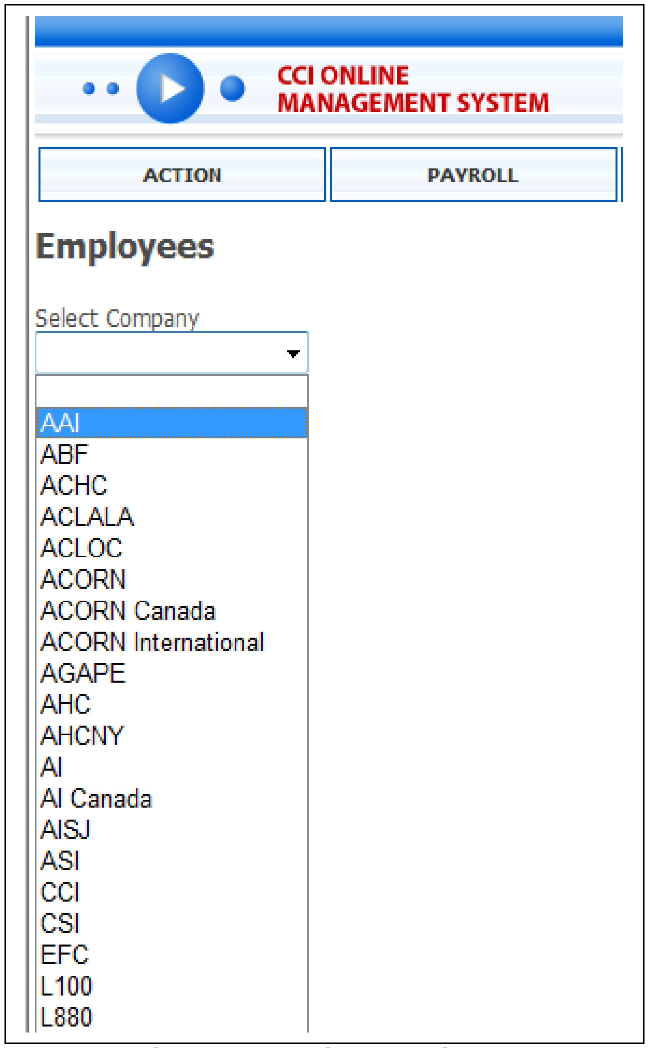

Figure 12 - Select employee

Once you've selected a company, the screen will refresh and display the **City** drop-down menu. Select the city with which the new employee is associated.

If no employees have been entered for the selected company, no cities will appear in the drop-down menu.
The number in parentheses next to each city indicates how many employees have been entered for that city.

After selecting the city, the screen will refresh to display a listing of all employees that have been entered for that city, along with the detailed information for each employee.

Click **Export** to process the new employee record into the system.

To reject an employee from being entered into the system, select the checkbox in the **Reject** column. A text field will appear beneath the checkbox, allowing you to enter a reason for the rejection (i.e. missing information, files that are in need of scanning, etc.).

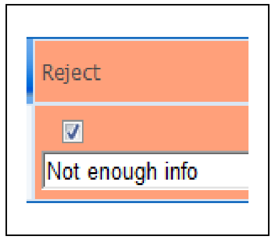

Figure 13 - Reject field

Next, click the **Process Rejects Only** button. The rejected employee record can then be called up for editing (see Section 1.3). When viewed, rejected records are shaded in pink and display the reason for the rejection in the **Reject** column.

When an employee record is rejected, the CCI system will generate a notification email to the creator of the record, indicating that the new hire packet has not met the qualifications for processing. The administrator can then log on to CCI OMS and select the **Edit/Submit Employees** menu option (see Section 1.3) to review the new hire packet and obtain the reason for the rejection. After the necessary edits have been made, the new hire packet must be resubmitted. If a record is not corrected and resubmitted within 72 hours of the rejection, the record will be deleted from the system.

1.5.Retrieving Information & Documents

To retrieve all relevant documentation and details for a particular employee, begin by selecting the **Retrieve Info/Documents** menu option under HR (see Figure 19):

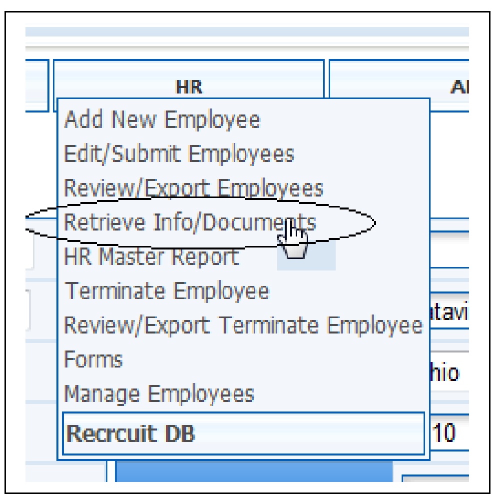

Figure 14 - Retrieve Info/Documents

The below screen appears, prompting you to retrieve the information by either entering the employee's social security number OR by entering the employee's first and last name.

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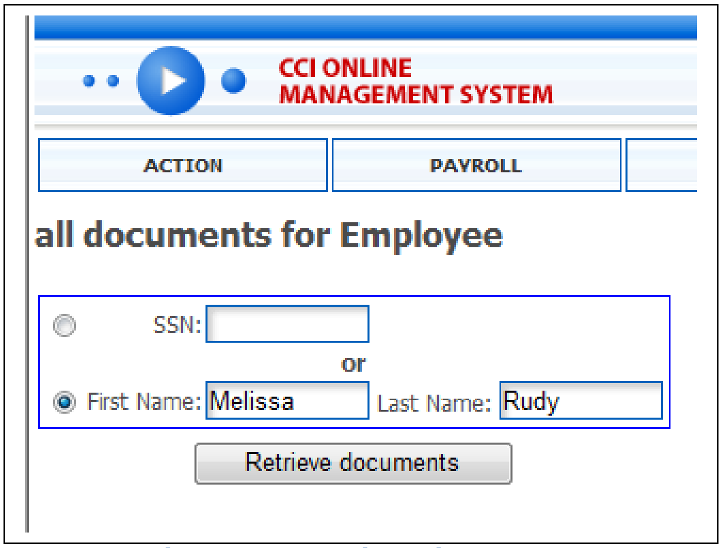

Figure 15 - Retrieve documents

Click the **Retrieve Documents** button to proceed. The screen refreshes to display all records matching your search parameters, along with all details that have been entered for each.

1.6.Generating an HR Master Report

To run a master Human Resources report, begin by selecting the **Retrieve Info/Documents** menu option under HR (see Figure 21):

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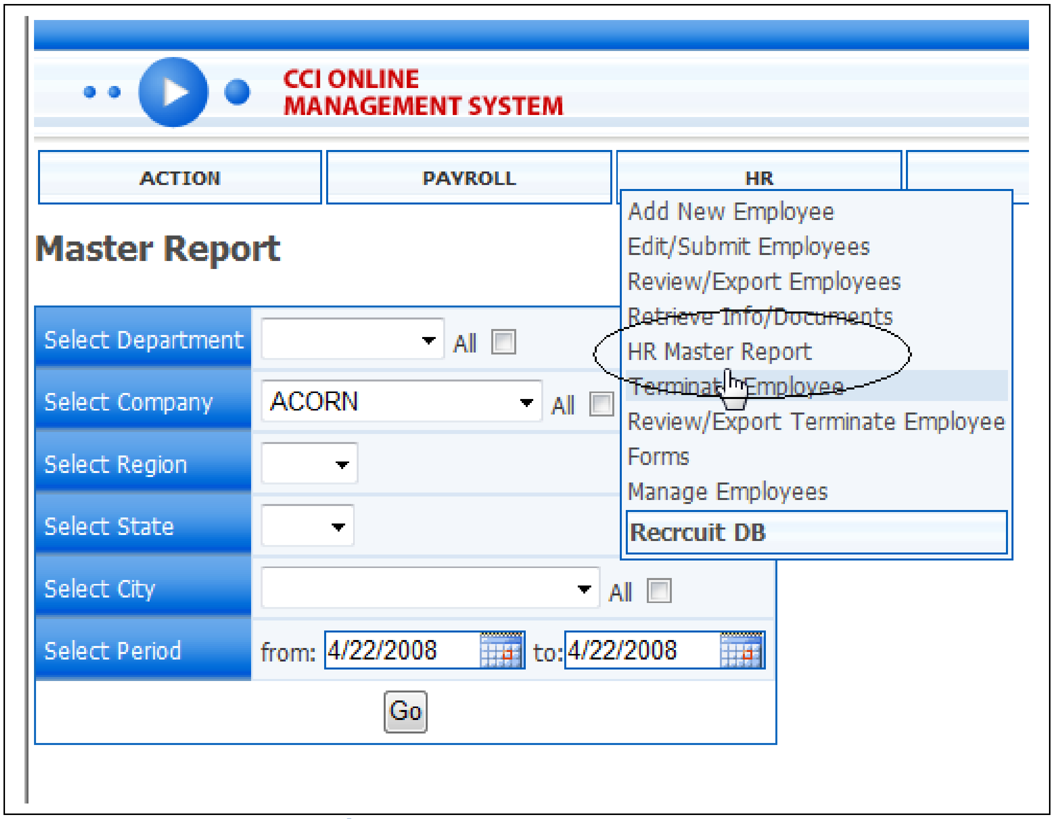

Figure 16 - HR Master Report

The **Master Report** screen appears, prompting you to enter the defining parameters of your report (see Figure 22):

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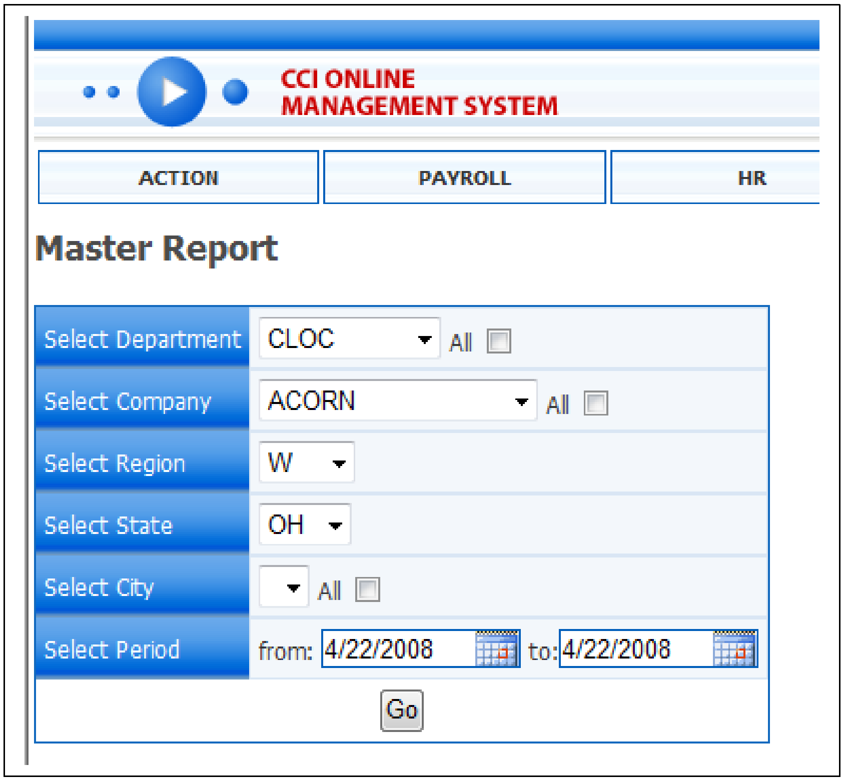
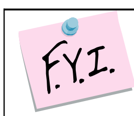


Figure 17 - Report parameters

Enter all relevant information into each field, as specified below:

Select Department	From the provided drop-down menu, select the name of the department for which you would like to generate the HR report.  To include all departments on the report, click inside the **All** checkbox to the right of the **Select Department** field.

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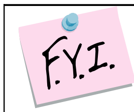
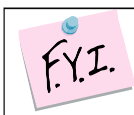
Select Company	Select the specific company for which you would like to generate the HR report.  To include all companies on the report, click inside the **All** checkbox to the right of the **Select Company** field.
Select Region	Select the region of the office for which you'd like to generate the report.
Select State	Select the location state of the office for which you'd like to generate the report.
Select City	Select the location city of the office for which you'd like to generate the report.  To include all available cities on the report, click inside the **All** checkbox to the right of the **Select City** field.
Select Period	Select the starting and ending date of the report duration. A pop-up calendar is provided for your convenience.

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Click the **Go** button. A comprehensive report launches in Excel, with all details displayed for each employee record matching the parameters you entered. From here, you can print the report, email it, or save a copy as an external file.

F	G	H	I	J	K	L	M	N	O	P	Q	R
HR Master Report												
Generated by Melissa Rusy on Tue Apr 22 2008 9:53:49 PM												
LastName	EmploymentDate	Address	Address_2	City	State	ZIP	Hourly Rate	Marital Status	Allowances	I_9	W_4	EmpTransForm
Whitlock	4/3/2008	24340 North Grange	Apt. 82A	Clinton Townshihp	MI	48306	8	Single	1	TRUE	TRUE	TRUE
Branch	4/16/2008	6626 Vinewood		Detroit	MI	48210	8	Single	1	TRUE	TRUE	TRUE
Miller	4/15/2008	11744 Rossiter		Detroit	MI	48224	8	Single	4	TRUE	TRUE	TRUE
Simmons	3/1/2008	3647 Zender		Detroit	MI	48207	8	Single	1	TRUE	TRUE	TRUE
Smith	3/28/2008	16219 Joy Road		Detroit	MI	48228	8	Single	3	TRUE	TRUE	TRUE
Sims	3/28/2008	244 Towncenter		Detroit	MI	48203	8	Single	3	TRUE	TRUE	TRUE
Snow	4/9/2008	15324 Monica		Detroit	MI	48238	8	Single	1	TRUE	TRUE	TRUE
Carr	4/9/2008	17267 Chapel		Detroit	MI	48219	8	Single	2	TRUE	TRUE	TRUE
Jomes	4/8/2008	676 Martin Luther King	Apt 16	Detroit	MI	48201	8	Single	5	TRUE	TRUE	TRUE
Crockett	4/8/2008	13508 Ferrelon St.		Detroit	MI	48212	8	Single	3	TRUE	TRUE	TRUE
Buchanan	4/3/2008	14016 3rd Street		Detroit	MI	48203	8	Single	2	TRUE	TRUE	TRUE
Goldsmith	4/8/2008	14016 3rd Street		Detroit	MI	48203	8	Single	3	TRUE	TRUE	TRUE
Johnson	4/8/2008	15712 Rockdale		Detroit	MI	48223	8	Single	1	TRUE	TRUE	TRUE
Brice	4/9/2008	18517 Stoepal		Detroit	MI	48221	8	Single	7	TRUE	TRUE	TRUE
Carpenter	4/9/2008	3894 Burns		Detroit	MI	48214	8	Single	4	TRUE	TRUE	TRUE
Fletcher	4/2/2008	20155 Charest		Detroit	MI	48234	8	Single	6	TRUE	TRUE	TRUE

Figure 18 - HR Master Report

1.7.Terminating Employees

In the event that a staff member's employment is ended, you must indicate the termination in the system. Begin by selecting the **Terminate Employee** menu option under HR (see Figure 25):

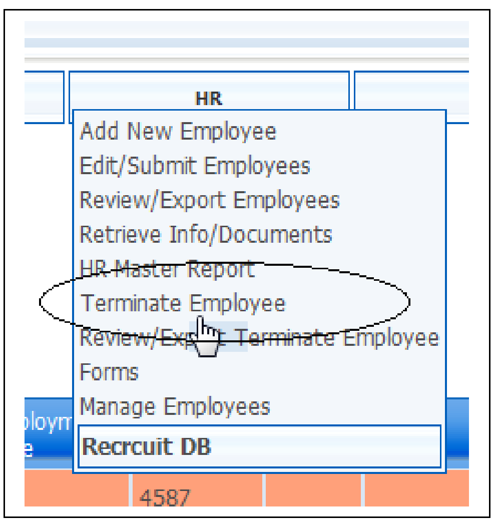


Figure 19 - Terminate Employee

The **Employees** screen appears with the two drop-down menus. Select the company and city with which the terminated employee is associated and click **Go**.

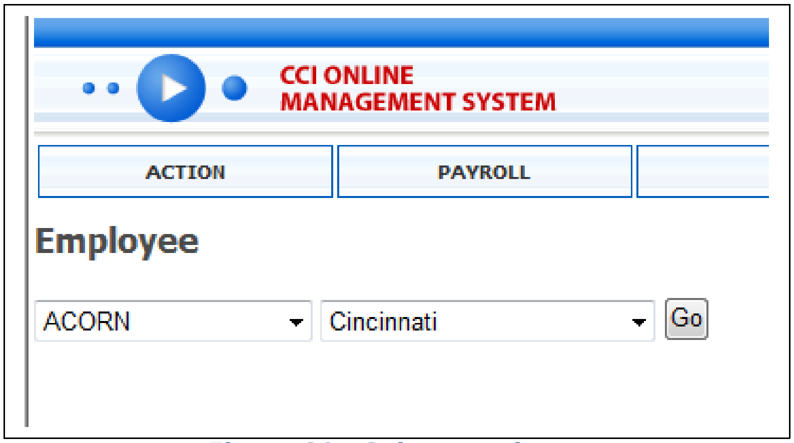


Figure 20 - Select employee

The screen refreshes and displays several input fields.

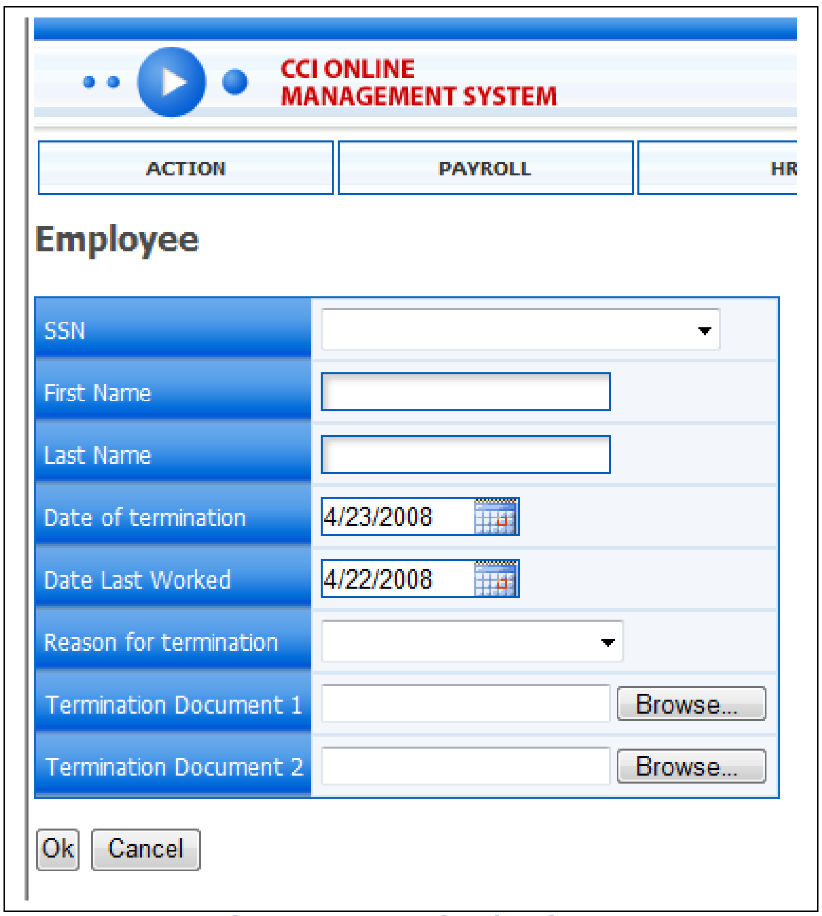
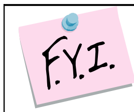
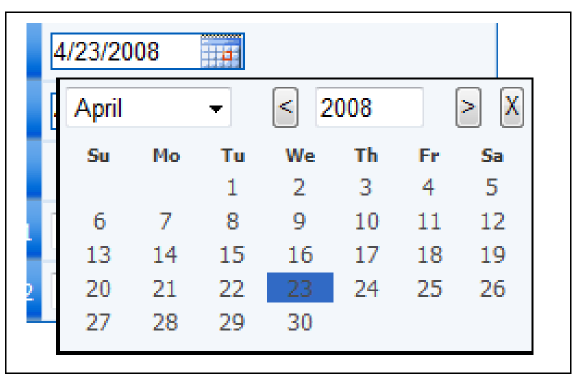


Figure 21 - Termination form

Provide the requested information for the following fields:

SSN	Select the employee you wish to flag as terminated. Both the social

	security number and full name of each employee is displayed. Employees are sorted alphabetically by last name, making it easy to locate a record.  In lieu of making a selection from the SSN field, you can manually enter the First Name and Last Name, and the SSN field will automatically populate.
First Name	This field is automatically populated when you select a SSN from the first drop-down field, or you can enter the first name manually into this field.
Last Name	This field is automatically populated when you select a SSN from the first drop-down field, or you can enter the last name manually into this field.
Date of Termination	Select the date marking the end of the employment period. A pop-up calendar is provided for your convenience.  **Figure 22 - Calendar**
Date Last Worked	Select the date marking the end of the employment period. A pop-up calendar is provided for your convenience.

<table>
<tr><td>Reason For Termination</td><td>From the provided drop-down menu, select the reason the employee’s service with the company has ended.

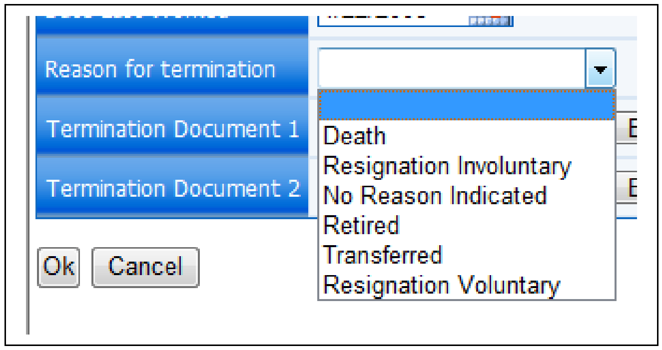


Figure 23 - Termination reason</td></tr>
<tr><td>Termination Documents</td><td>To attach any documentation specifying the details of the termination, such as a resignation letter, employee review, transferral notice, or letter of warning, click Browse and locate the file on your local or shared drive.</td></tr>
</table>

Click **OK** to process the termination. A confirmation message appears indicating that the application for termination has been processed.

Figure 24 - Termination confirmation

1.8.Reviewing & Exporting Terminated Employees

Once you have processed an application for an employee termination (see section 1.7), the termination must be reviewed and approved before it becomes official. Begin by selecting the **Review/Export Terminate Employee** menu option from the **HR** drop-down menu (Figure 31):

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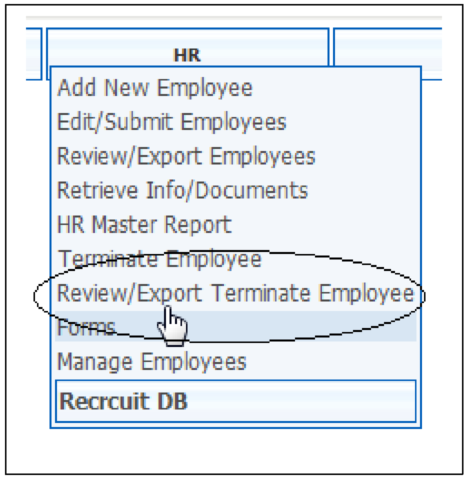


Figure 31 - Review/Export menu option

The **Employees** screen appears with the **Company** drop-down menu. Select the company with which the existing employee is associated.

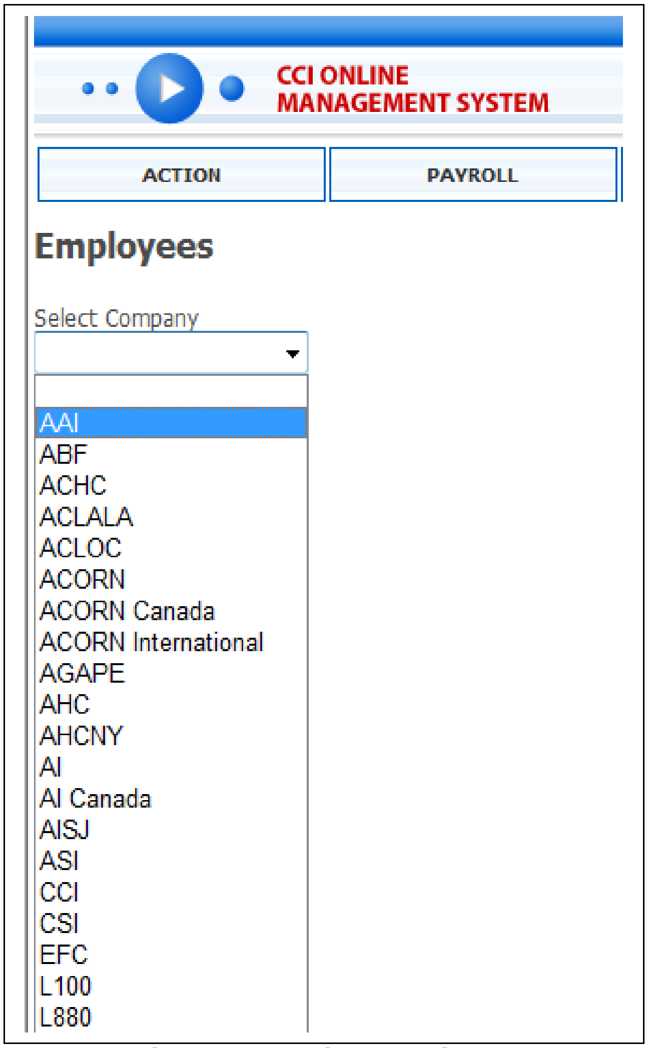
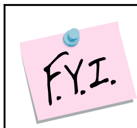


Figure 32 - Select employee

Once you've selected a company, the screen will refresh and display the **City** drop-down menu. Select the city with which the new employee is associated.



If no employees have been entered for the selected company, no cities will appear in the drop-down menu.
The number in parentheses next to each city indicates how many employees have been entered for that city.

After selecting the city, the screen will refresh to display a listing of all employees that have been processed for termination, along with the detailed information for each employee. Among the details shown are the date of termination, date last worked, and reason for termination. Any documentation that may have been attached to the employee's termination record (i.e. employee evaluations, letters of resignation, transfer forms, etc.) are also included as PDF attachments.

1.8.1 Exporting Terminated Employees

Begin by selecting the **Export** checkbox for the employee to be terminated, and then click the **Export** button at the lower left corner of the screen to approve the application for termination.

1.8.2 Editing a Termination Record

To make changes to the termination details for any employee, click the **Edit** button to the right of the **Export** checkbox. The **Employee** screen appears with the employee's existing information populated. Make any necessary changes and click **OK** to save.

1.8.3 Rejecting a Termination Application

To delete the termination request for an employee, click the **Delete** button to the right of the **Edit** button.

1.9.Accessing Forms

To access the collection of Human Resources forms, simply select the **Forms** menu option under **HR**.

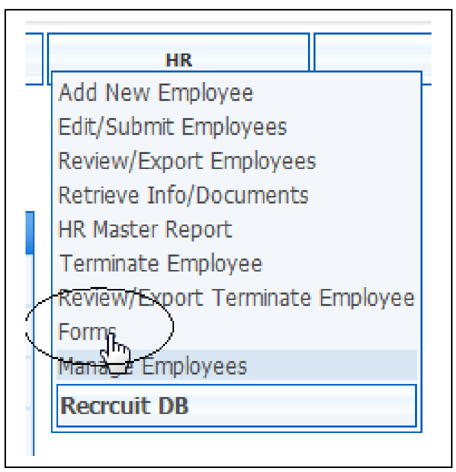


Figure 36 – Forms menu

The screen refreshes to display a listing of administrative forms that can be downloaded for use, such as Termination Memos, Direct Deposit forms, 401K Enrollment forms, tax forms, etc. (see Figure 37).

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forms

Form Name	Type
Termination Memo	HR
Direct Deposit Form	HR
Employee Benefit Termination application	HR
401K enrollment form	HR
Staff policies 2006 revision	HR
Skills Assessment & Development Plan	HR
Health Enrollment Form	HR
SCHEDULE OF BENEFITS	HR
I-9 2007	HR
HR Instructions	HR
2008 W-4	HR
Employee Advance Form	HR
Temporary Employee Transmittal Form	HR
ACORN Deposit Form	HR
ACORN Allocation Form	HR

Figure 37– Forms list

All forms are provided in PDF format. To open or save a form, simply click on the hyperlinked form name. You will be prompted to open the form or save it to a local or network drive.

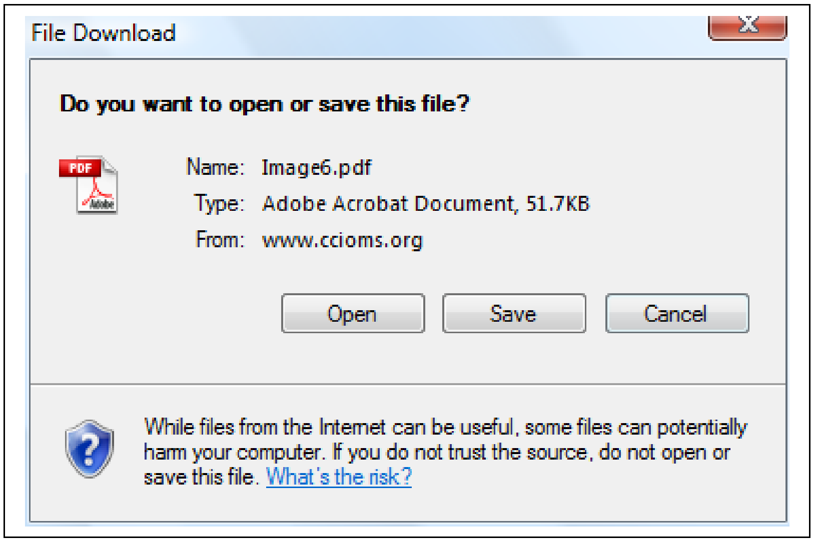

Figure 37– Open or save form

1.10. Assigning Managers to Employees

To access the Employee Manager function of OMS, select the **Manage Employees** menu option under **HR**.

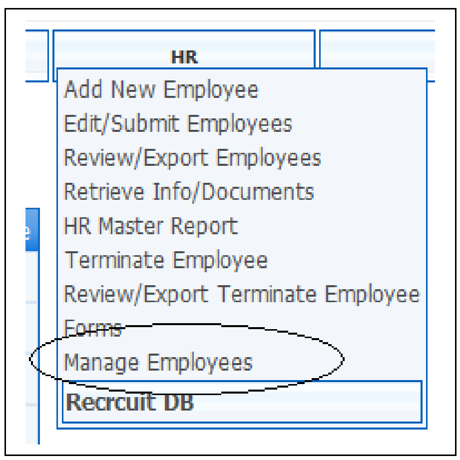

Figure 38– Manage employees menu

The screen refreshes to display the **Employees Manager** (Figure 39).

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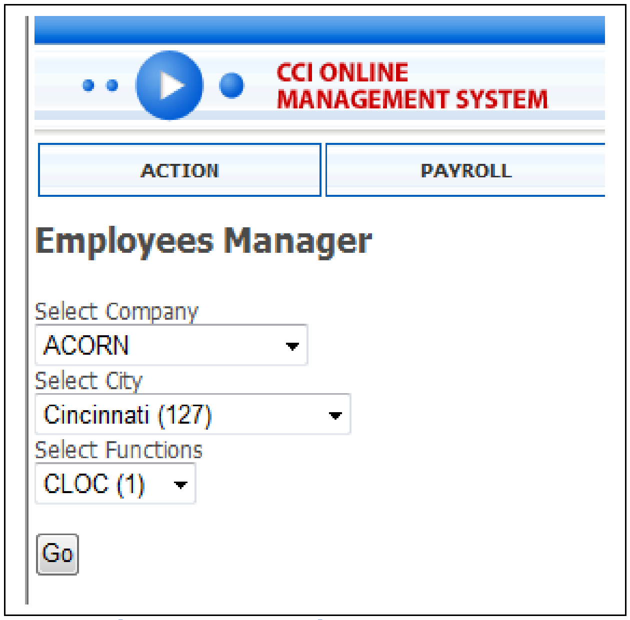

Figure 39 – Employees Manager

Select the company with which the employee is associated.
Once you've selected a company, the screen refreshes and the **City** drop-down menu displays only those cities containing employees. Select the city with which the employee is associated.

If no employees have been entered for the selected company, no cities will appear in the drop-down menu.
The number in parentheses next to each city indicates how many employees have been entered for that city.

Once you've selected a city, the screen refreshes and the **Function** drop-down menu displays only those functions containing employees. Select the function with which the employee is associated.

If no employees have been entered for the selected company and city, no functions will appear in the drop-down menu.
The number in parentheses next to each function indicates how many employees have been entered for that function.

Click **Go** to process the search. The screen refreshes and displays a listing of all employees that match your search parameters. If a manager has already been assigned to the employee, their name is displayed in the **Manager** column. If a manager has not been assigned, the column displays "not set" (see Figure 40).

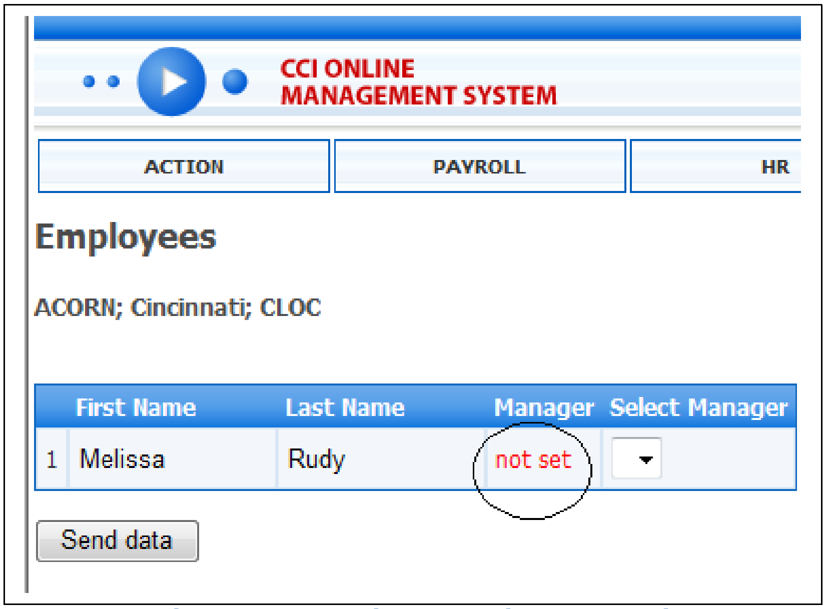

Figure 40 – Employees to be Managed

To assign a manager to an employee (or to change the current manager), select an option from the **Manager** drop-down menu and click **Send Data**.

1.11.Using the Recruiting Database

The OMS offers a full recruiting database to assist HR administrators in their recruiting efforts. To access the Recruiting function of OMS, select the **Recruit DB** menu option under **HR**. Three sub-options appear.

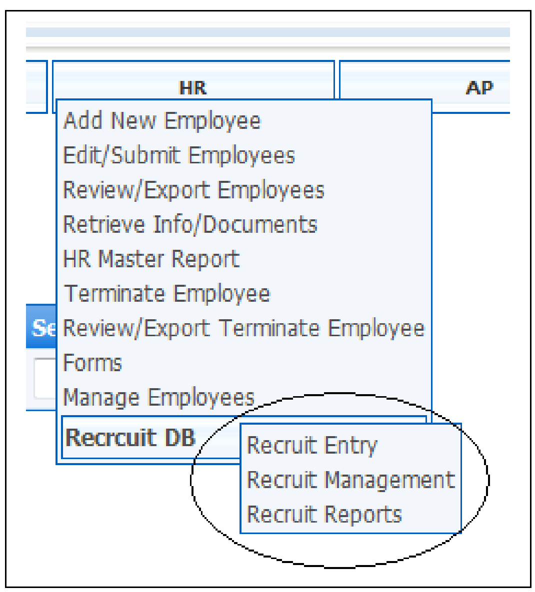

Figure 41 – Recruiting Menu

1.11.1 Entering New Recruits

To enter a new recruit or prospect, select **Recruit DB -> Recruit Entry** from the **HR** menu. The **Recruit Entry** screen appears with a variety of entry fields.

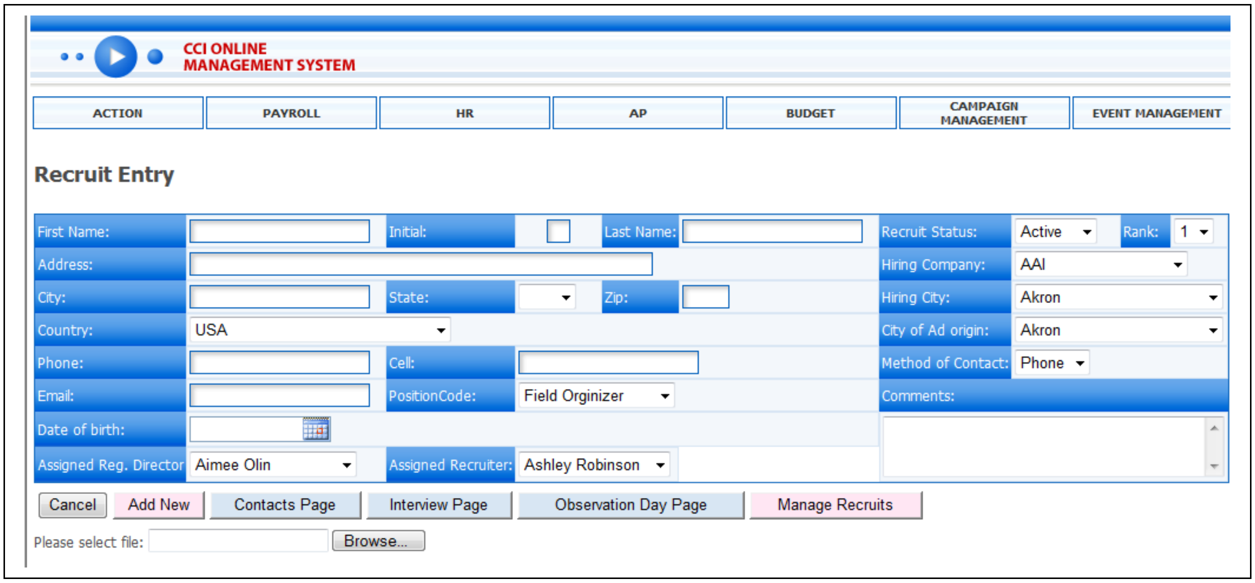

Figure 42 – Recruit Entry Screen

Enter all relevant information into each field, as specified below. All bolded field names are required.

First Name, Initial, Last Name	Enter the first name, middle initial, and last name of the recruit.
Address, City, State, Zip	Enter the mailing address of the recruit. The **State** field provides a drop-down list for your convenience.
Country	From the provided drop-down menu, select the country of the recruit.
Phone & Cell	Enter the respective phone numbers of the prospective employee with area code.
Email	Enter the email address of the recruit.
Position Code	Select the position for which the recruit has applied.
Date of Birth	Select the recruit’s date of birth. A pop-up calendar is provided for your convenience.
Assigned Reg. Director	Select the regional director from the drop-down menu.
Assigned Recruiter	Select the recruiter who has been assigned to the prospective employee.
Recruit Status	Select an option from the drop-down menu to indicate whether the person is an active recruit, an inactive recruit, or whether he/she has

	already been hired.
Rank	Indicate the rank (1-4) of the recruit.
Hiring Company	Select the company attempting to recruit the employee.
Hiring City	Select the home city of the company attempting to recruit the employee.
City of Ad Origin	Select the city where the employment advertisement was originally published.
Method of Contact	Indicate if the employee was contacted by phone or email.
Comments	Enter any miscellaneous comments regarding the prospective employee or the recruiting process.

Click **Add New** to process the new recruit record into the system.

If there are any documents you'd like to add to the recruit record, such as a resume, cover letter, or skills assessment, click the **Browse** button below the form and select the file to attach.

The screen refreshes and displays a confirmation message that the new recruit has been added.

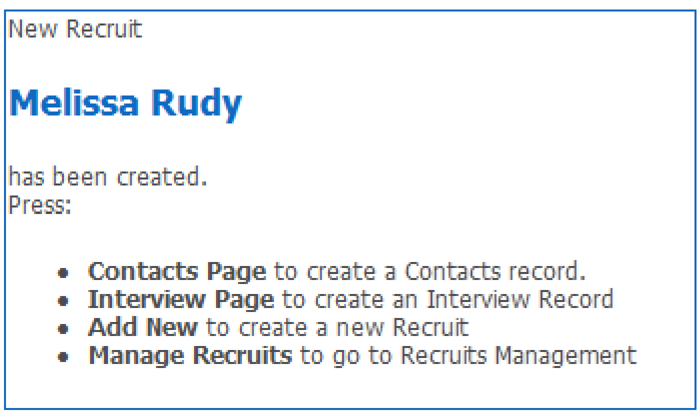

Figure 43 – Recruit Confirmation

The screen also details several other actions that can be taken:

- Click the **Contacts Page** button to enter a record of contact made with the recruit. A new section appears below the recruit form:

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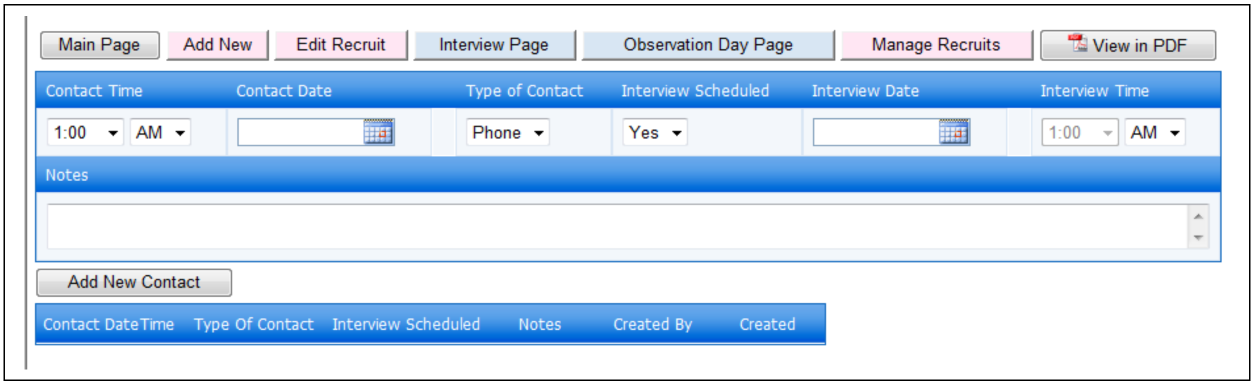

Figure 44 – Add New Contact

On this screen, you can enter the details of each point of contact, including the time of day, date of contact, and method of contact. There are also fields to indicate whether an interview was scheduled, the date of the interview, and the interview time. The **Notes** field allows you to enter any additional information pertaining to the conversation. Click **Add New Contact** to save the record. The details of any existing contacts are displayed in the list below.

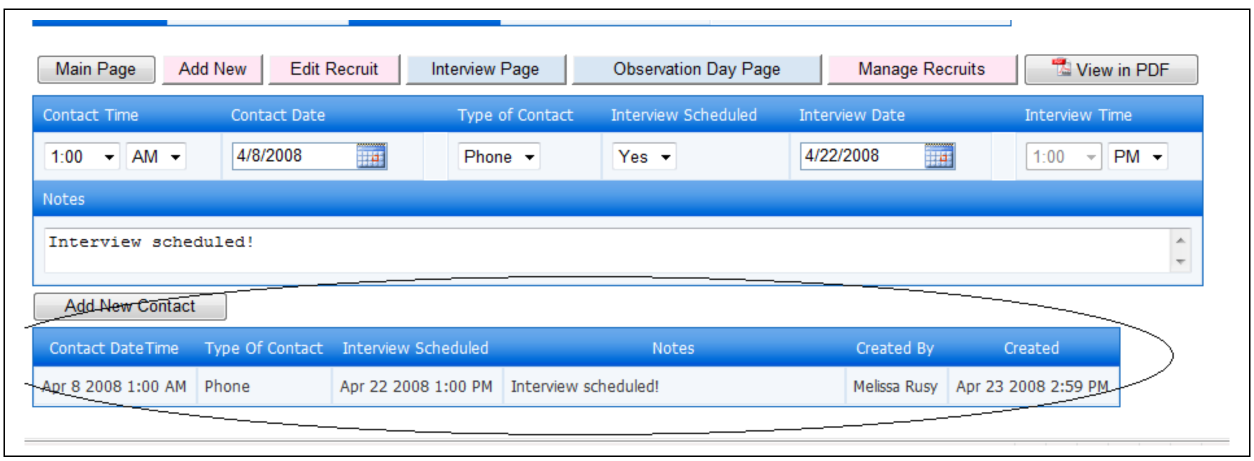

Figure 45 – Existing Contacts

- Click the **Interview Page** button to create an interview record for the recruit. A new section appears below the recruit form:

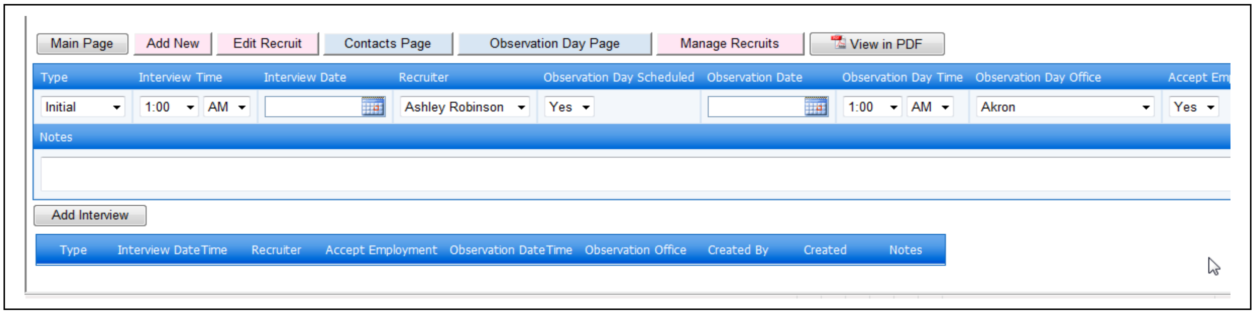

Figure 46 – Interview Record

On this screen, you can enter the details of each interview, including the type of interview (Initial or Follow-up), the time and date of the interview, and the recruiter assigned to the employee. There are also fields to indicate whether an Observation Day has been scheduled, as well as the date and time of the Observation Day. The **Accept Employment** field lets you indicate whether the recruit has accepted a position. The **Notes** field allows you to enter any additional information pertaining to the interview. Click **Add Interview** to save the record. The details of any previous interviews are displayed in the list below.

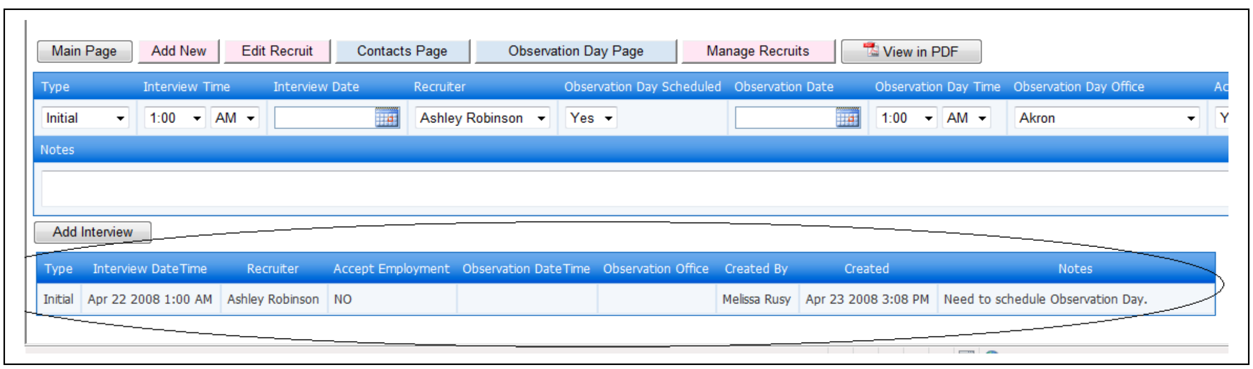

Figure 47 – Previous Interviews

- Click the **Observations Page** button to create an observation record for the recruit. A new section appears below the recruit form:

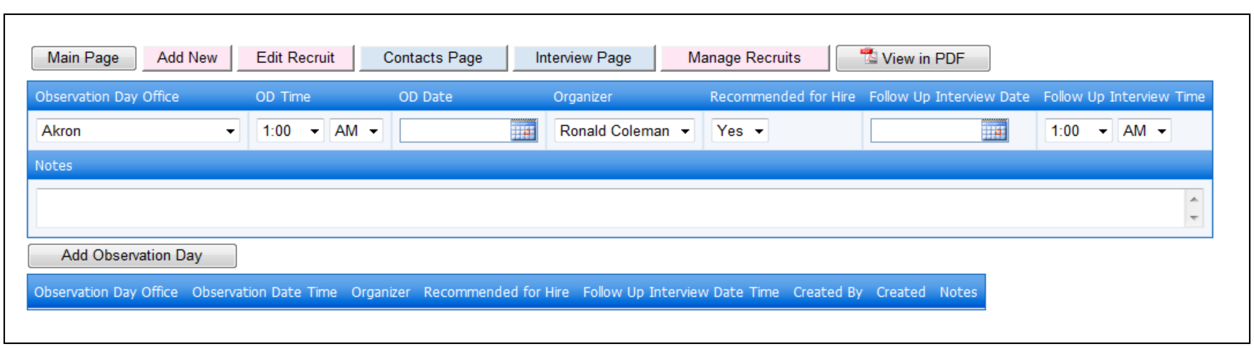

Figure 48 – Observation Record

On this screen, you can enter the details of each period of observation, including the office in which the observation took place, the date and time, and the organizer of the observation. There are also fields that allow you to indicate whether the recruit is recommended for hire, as well as a follow-up interview date and time. The **Notes** field allows you to enter any additional information pertaining to the observation. Click **Add Observation Day** to save the record. The details of any previous observations are displayed in the list below.

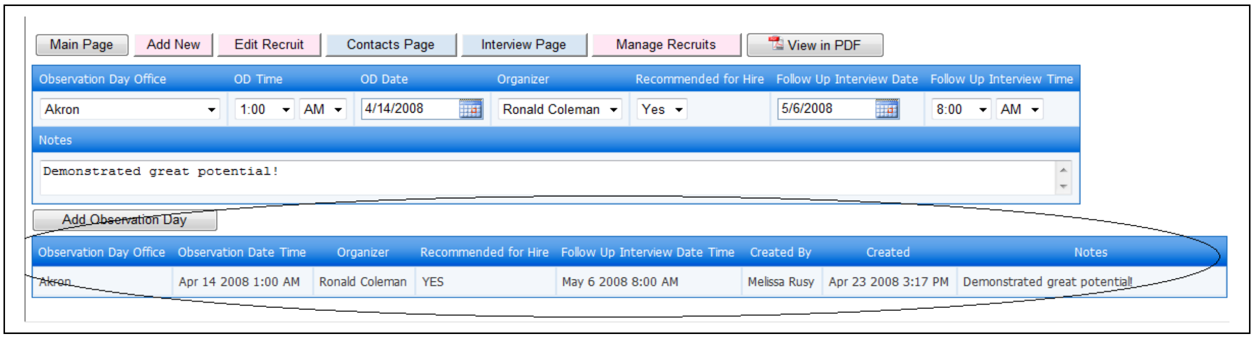

Figure 49 – Previous Observations

- Click **View in PDF** to view all existing details for the recruit, including points of contact, interview details, and observation records, in PDF format (Figure 48).

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First name:	Melissa	Initial:	M	Last name:	Rudy	Recruit status:	Active	Rank:	1
Address:	123 Main Street					Hiring Company	AAI		
City:	Batavia	State:	OH	ZIP	45103	Hiring City:	Akron		
Country:	USA					City of Ad origin:	Akron		
Phone:	(513) -	Cell:	( ) -			Method of Contact:	Voicemail		
Email:	123@123.com	Position code:	Field Orginizer			Comments:			
Date of birth:	( ) -								
Regional director:	Aimee Olin	Assigned recruiter:	Ashley Robinson						
Created:	Apr 23 2008 2:34 PM	Modified:	Apr 23 2008 2:34 PM						
Create by:	Melissa Rusy	Modified by:	Melissa Rusy						

Recruit Contacts

Contact Datetime	Type Of Contact	Interview Scheduled	Created	Created By	Notes
Apr 8 2008 1:00 AM	Phone	Apr 22 2008 1:00 PM	Apr 23 2008 2:59 PM	Melissa Rusy	Interview scheduled!

Recruit Interviews

Type	Interview Datetime	Recruiter	Accept Employement	Observation Datetime	Observation Office	Created By	Created	Notes
Initial	Apr 22 2008 1:00 AM	Ashley Robinson	NO			Melissa Rusy	Apr 23 2008 3:08 PM	Need to schedule Observation Day.

Recruit Observations

No data

Figure 50 – PDF Report

- Click **Manage Recruits** to enter the Recruit Managements module (see Section 1.12).

1.11.2 Working in Recruits Management

To manage existing recruits, select **Recruit DB -> Recruit Management** from the **HR** menu.

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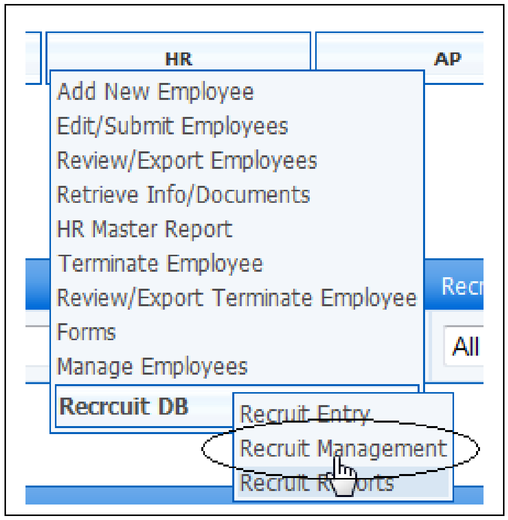
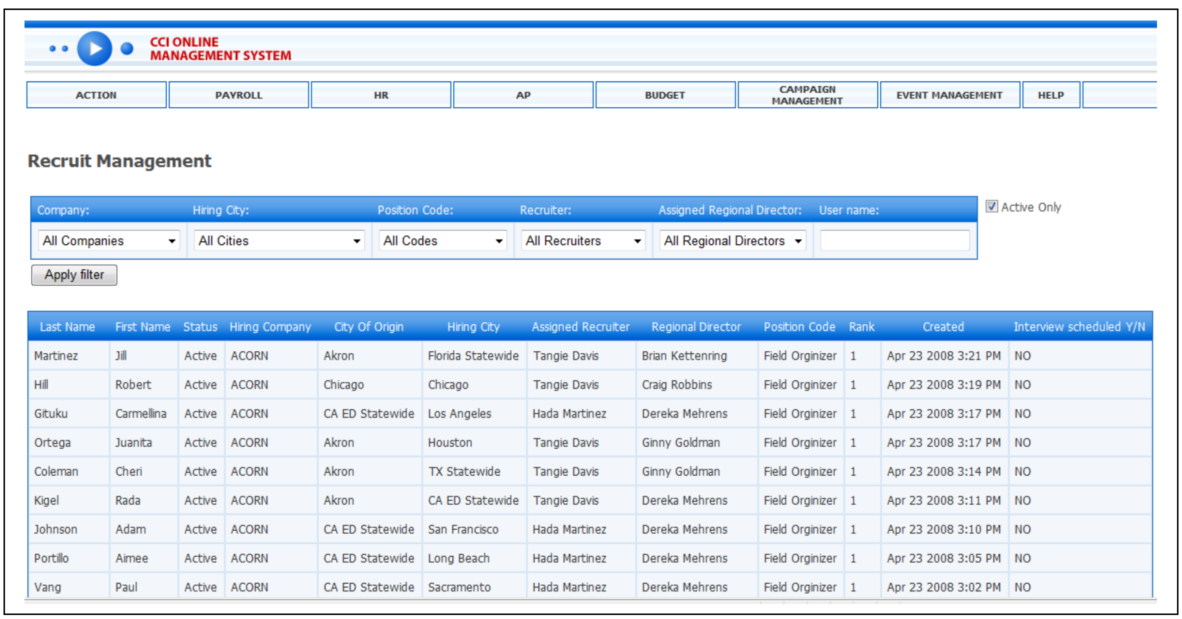


Figure 51 – PDF Report

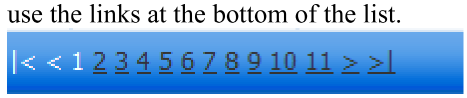
The **Recruit Management** screen appears with a listing of all recruits that have been entered into the system. All details are displayed for the employees, including name, current status, company, assigned recruiter, regional director, position, rank, and interview status.



Last Name	First Name	Status	Hiring Company	City Of Origin	Hiring City	Assigned Recruiter	Regional Director	Position Code	Rank	Created	Interview scheduled Y/N
Martinez	Jill	Active	ACORN	Akron	Florida Statewide	Tangie Davis	Brian Kettenring	Field Orginizer	1	Apr 23 2008 3:21 PM	NO
Hill	Robert	Active	ACORN	Chicago	Chicago	Tangie Davis	Craig Robbins	Field Orginizer	1	Apr 23 2008 3:19 PM	NO
Gituku	Carmellina	Active	ACORN	CA ED Statewide	Los Angeles	Hada Martinez	Dereka Mehrens	Field Orginizer	1	Apr 23 2008 3:17 PM	NO
Ortega	Juanita	Active	ACORN	Akron	Houston	Tangie Davis	Ginny Goldman	Field Orginizer	1	Apr 23 2008 3:17 PM	NO
Coleman	Cheri	Active	ACORN	Akron	TX Statewide	Tangie Davis	Ginny Goldman	Field Orginizer	1	Apr 23 2008 3:14 PM	NO
Kigel	Rada	Active	ACORN	Akron	CA ED Statewide	Tangie Davis	Dereka Mehrens	Field Orginizer	1	Apr 23 2008 3:11 PM	NO
Johnson	Adam	Active	ACORN	CA ED Statewide	San Francisco	Hada Martinez	Dereka Mehrens	Field Orginizer	1	Apr 23 2008 3:10 PM	NO
Portillo	Aimee	Active	ACORN	CA ED Statewide	Long Beach	Hada Martinez	Dereka Mehrens	Field Orginizer	1	Apr 23 2008 3:05 PM	NO
Vang	Paul	Active	ACORN	CA ED Statewide	Sacramento	Hada Martinez	Dereka Mehrens	Field Orginizer	1	Apr 23 2008 3:02 PM	NO

Figure 52 – Recruit Management

To scroll through multiple pages of recruits, use the links at the bottom of the list.



1.11.2a Filtering Recruits

The Recruit Management module provides several different ways for you to filter the recruits that are listed (Figure 53).

Figure 53 – Recruit Filters

You can select a specific company, city, position, assigned recruiter, assigned regional director, and/or user name, then select **Apply filter** to streamline the list. Multiple filters can be applied.

If you want to suppress any inactive recruits from appearing, click the **Active Only** checkbox to the right of the filters.

1.11.2b Managing Recruits

To work with a specific recruit record, begin by selecting the record in the list. This activates several buttons along the bottom of the page.

Figure 54 – Selecting a Recruit

From here, you can perform a variety of actions pertaining to the recruit:

- Click the **Edit Recruit** button to make changes to any of the prospective employee's information (see section 1.11.1).
- Click the **Contacts Page** button to enter or view points of contact made with the recruit (see section 1.11.1).

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- Click the **Interview Page** button to create or view an interview record for the recruit (see section 1.11.1).
- Click the **Observation Day Page** button to create or view an observation record for the recruit (see section 1.11.1).
- Click **View Recruit** to view all information pertaining to the recruit, including points of contact, interview details, and observation records, on one screen.
- Click **View in PDF** to view all existing details for the recruit, including points of contact, interview details, and observation records, in PDF format.

1.11.3 Generating Recruit Reports

To run a recruiting report, select **Recruit DB->Recruit Reports** from the **HR** menu.

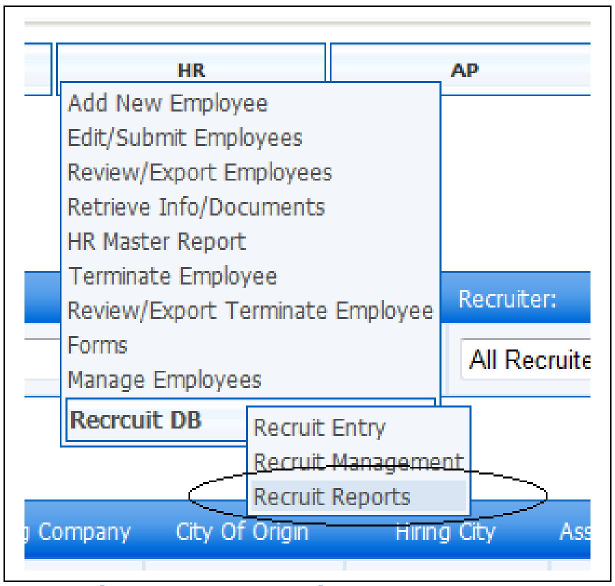

Figure 55 – Recruit Reports Menu

The **Recruit Reports** screen appears, displaying the available reports:

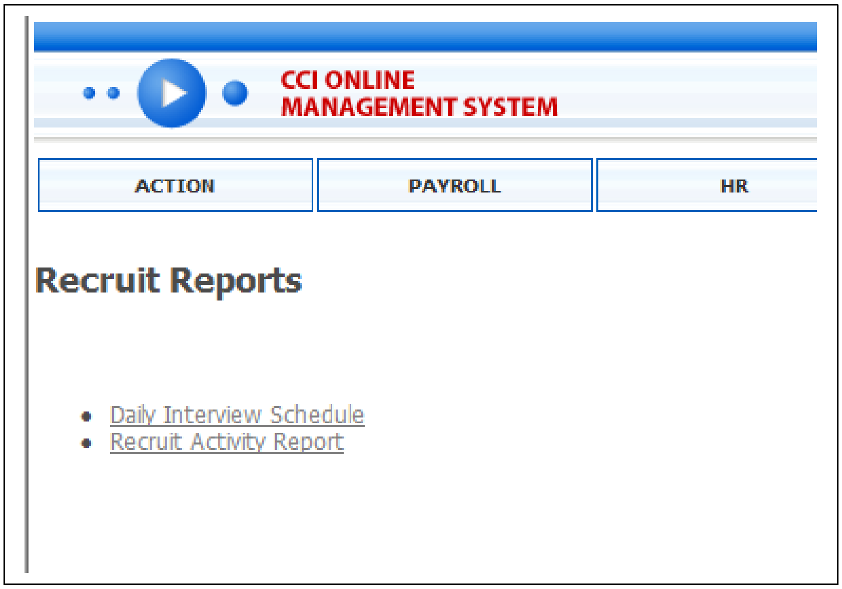

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Figure 56 – Recruit Reports

1.11.3a Running a Daily Interview Schedule

To run a report of any interviews that have taken place on a given day, begin by clicking the **Daily Interview Schedule** link. The **Daily Interview Schedule** screen appears (Figure 57). By default, all filters are set to view all.

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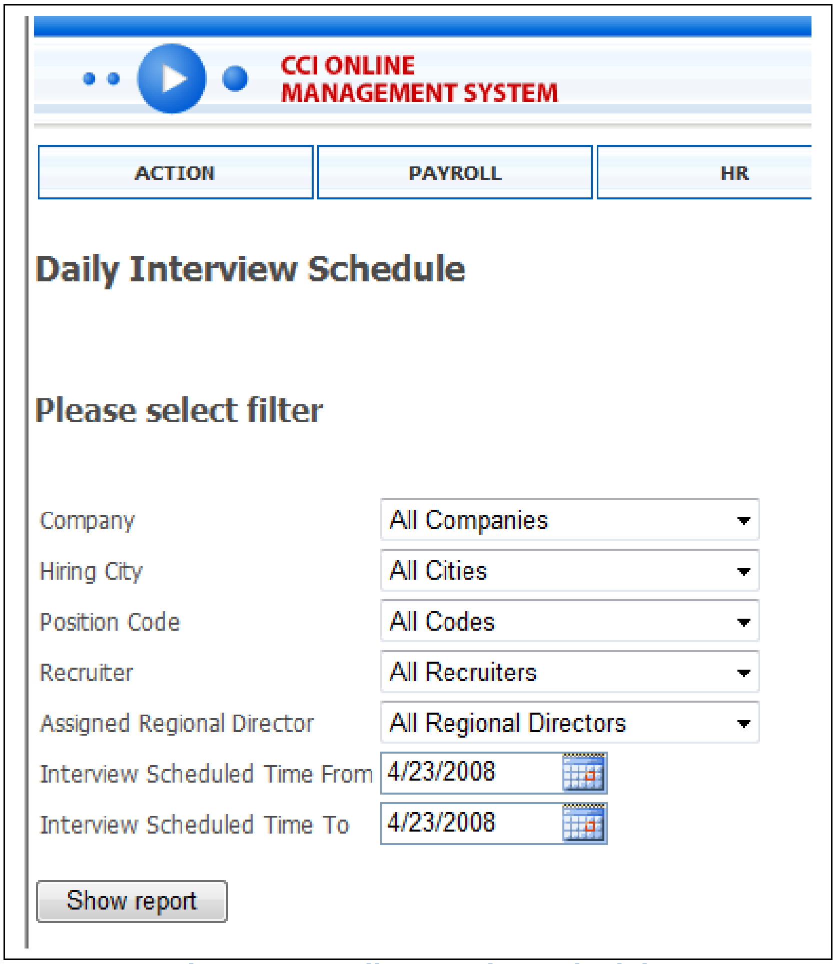

Figure 57 – Daily Interview Schedule

You can narrow down your report by making selections from one or more of the provided filters:

Company	Select the name of the company for which you want to view interview records.
Hiring City	Select the name of the city for which you want to view interview records.
Position Code	Select the type of position for which you want to view interview records.
Recruiter	Select the name of the assigned recruiter for which you want to view interview records.
Assigned Regional Director	Select the name of the assigned regional director for which you want to view interview records.
Interview Time	Select the date range for which you want to view interview records. Pop-up calendars are provided for your convenience.

Click **Show Report** to generate the interview listings.

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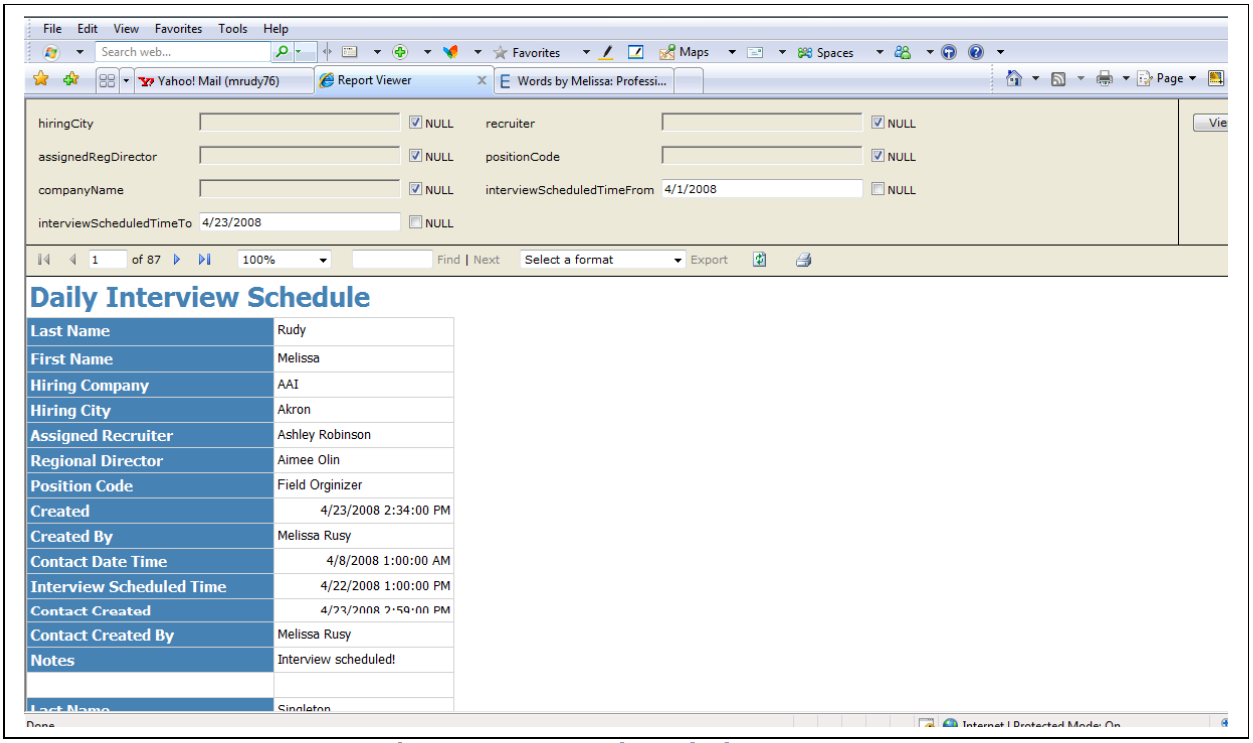


Figure 58 – Interview Listings

All details are displayed for the interviews matching your search criteria.
A menu bar is displayed above the interview listings (Figure 59). Here, you can scroll through the pages of results, adjust the size of the report, do a text search for a specific report, export the report in various formats, or print the report.

Figure 59 – Reports Menu

If you have entered filters for any components of the report, you can adjust those filters in the area above the report (see Figure 60):

Figure 60 – Filters

1.11.3b Running a Recruit Activity Report

To run a report of any recruiting activities that have taken place for any given parameter, begin by clicking the **Recruit Activity Report** link. The **Recruit Activity Report** screen appears (Figure 61). By default, all filters are set to view all.

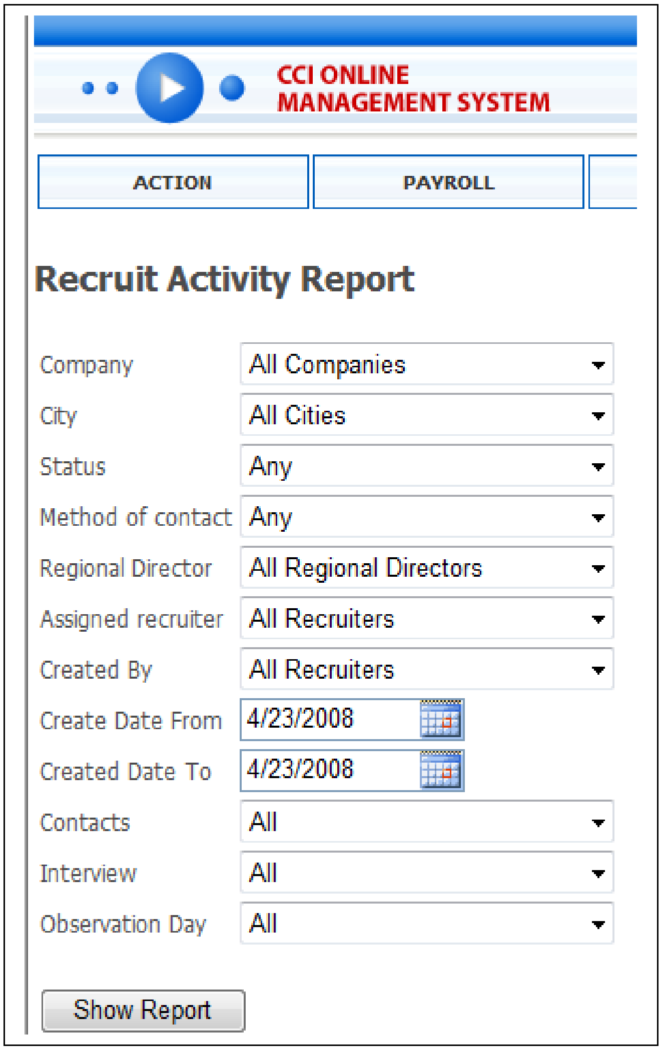


Figure 61 – Recruit Activity Report

You can narrow down your report by making selections from one or more of the provided filters:

Company	Select the name of the company for which you want to view recruiting activity.
City	Select the name of the city for which you want to view recruiting activity.
Status	Use this field to narrow down the status of the recruits (**Active**, **Inactive**,

	or **Hired**).
Method of Contact	If you'd like to view phone activity, select **Phone**. For email recruiting activity, select **Email**.
Assigned Regional Director	Select the name of the assigned regional director for which you want to view recruiting activity.
Assigned Recruiter	Select the name of the assigned recruiter for which you want to view recruiting activity.
Created By	Select the name of the person who created the recruiting activity for which you are searching.
Create Date (From/To)	Select the date range for which you'd like to view recruiting activity.
Contacts	Indicate whether you want to view activity for recruits that have or had not had points of contact entered into their records.
Interview	Indicate whether you want to view activity for recruits that have or had not had interviews.
Observation Day	Indicate whether you want to view activity for recruits that have or had not had workplace observation periods.

Click **Show Report** to generate the activity listings.

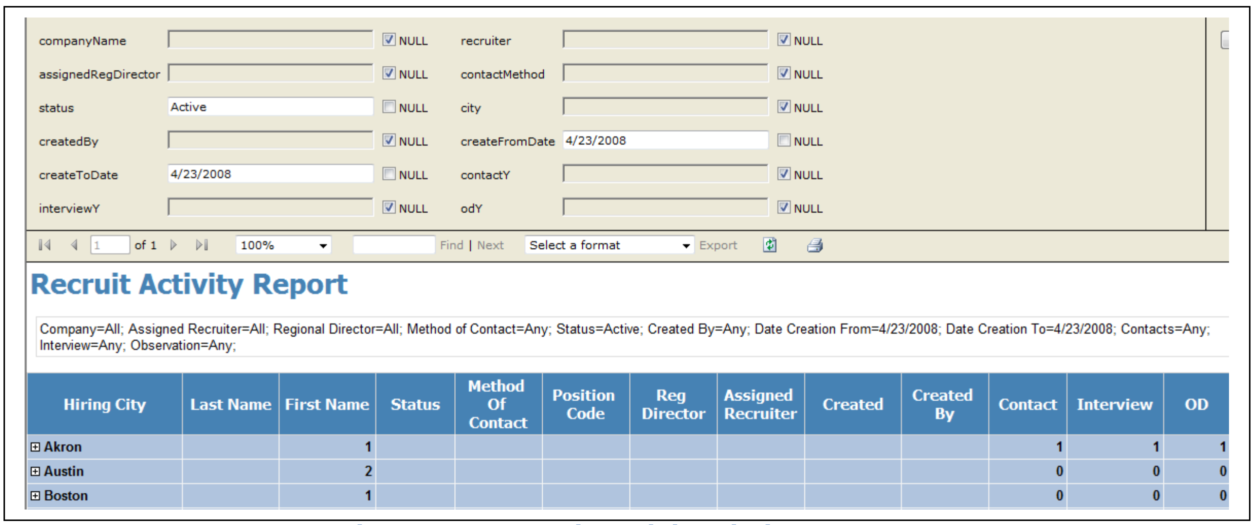
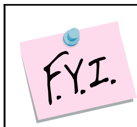


Figure 62 – Recruit Activity Listings

All details are displayed for the recruiting activities matching your search criteria.



The **First Name** column indicates how many recruits are in the system for each hiring city.
The **Contact**, **Interview**, and **OD** columns indicate how many recruits have had points of contact, interviews, and/or observations entered into the system.

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To expand a hiring city and view all records within, click once on the name of the city. The details will appear beneath it (see Figure 63).

Hiring City	Last Name	First Name	Status	Method Of Contact	Position Code	Reg Director	Assigned Recruiter	Created	Created By	Contact	Interview	OD
⊟ Akron		1								1	1	1
	Rudy	Melissa	Active	Voicemail	Field Orginizer	Aimee Olin	Ashley Robinson	4/23/2008 2:34:00 PM	Melissa Rusy	1	1	1
⊞ Austin		2								0	0	0
⊞ Boston		1								0	0	0
⊞ CA ED Statewide		3								0	0	0
⊞ CA Nat Expansion		1								0	0	0

Figure 63 – Recruit Activity Details

A menu bar is displayed above the interview listings (Figure 62). Here, you can scroll through the pages of results, adjust the size of the report, do a text search for a specific report, export the report in various formats, or print the report.

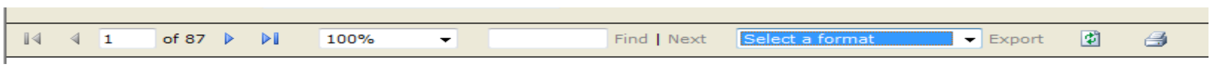

Figure 64 – Reports Menu

If you have entered filters for any components of the report, you can adjust those filters in the area above the report (see Figure 65):

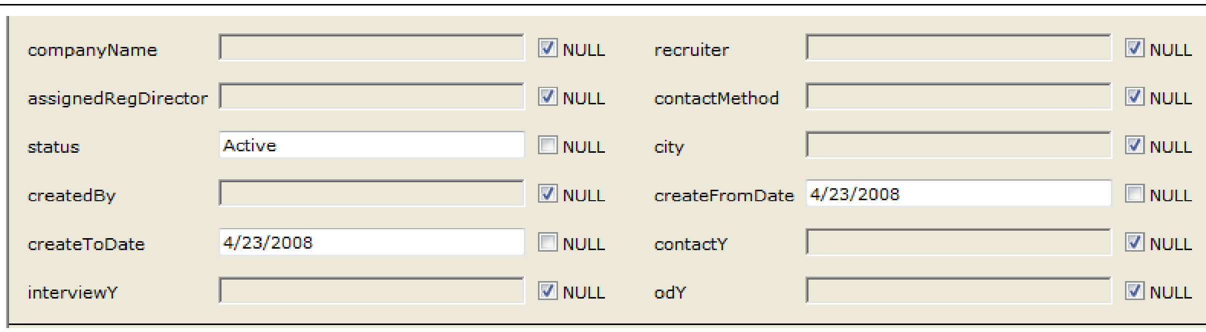

Figure 65 – Filters