

Quick Guide

Create projects



HR MANAGER
TALENT SOLUTIONS

Overview

Project is the job position and where candidates apply. You can easily create a new project.

In this guide, these steps will be explained as well as a few tips:

- [Create new project](#)
- [Project Details](#)
- [Project leader and participants](#)
- [Create and add project participant](#)
- [The user name already exists](#)
- [Available Application Language](#)
- [Notes and Attachments](#)
- [Other options](#)
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- [Modifying notifications](#)
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- [Questionnaire](#)
- [Advertisement](#)
- [Confirmation](#)

Create new project

Click on 'New project' in the menu to create a new project.

You now enter the project wizard, which consists of a number of tabs.

NB: Be aware that if you have several work flows, the first view will be a page where you select the wanted work flow.

HR MANAGER
Talent Solutions

Home Projects Candidate database Calendar Statistics File archive Administration

New project

New project
Copy project

In this module, you can create a new project.

Project Details Communication Questionnaire Advertisement Application Redirection Confirmation

Here you can type in the basic project details.

Project Details

Project name:*
Project internal name:
Application due: [Date picker]
Department: Europe [Select]
Workplace: [Error: No items available (lanq/d:1.colld1196)]
Google Maps: [Select address to show in Google Map on advertisement.]
Position category: [Error: No items available (lanq/d:1.colld1197)]

Additional Project Details

Start date: [Date picker] [Start as soon as possible]

Available Application Languages

Tick the languages you would like to be available on the application form. Candidates may then select an application form in any of these languages.

☒ English
☐ Dansk

Default: English

Access Options

Project leader:*
Add
Last name First name Contact Person * Remove
Bloch Dan [Remove]
Project participants:
Create and add | Add
Last name First name Contact Person *
No Project Participants added
* = Contact persons will only be shown in the advertisement if info about contacts is used in the layout template.

Notes

Attachments

Other Options

Project type: Recruitment Project
The project is active ☒
Enable auto unpublish ☒
Block new applications on application due ☒
Block edit of existing applications on application due ☒
Enable application redirection ☒

Notifications

Save Save & Next

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Project Details

The first tab is called 'Project Details'.

Fill out all the mandatory fields and other applicable fields.

Mandatory fields are shown with a red symbol eg. 'Project name: *'.

It may vary which fields have been defined mandatory by each company.

Create project by clicking 'Save' in the bottom of the page.

Project Details Communication Questionnaire Advertisement Application Redirection

Here you can type in the basic project details.

Project Details

Project name:*

Project internal name:

Application due: Time

Department:

Workplace:

Google Maps:

(Select address to show in Google Map on advertisement.)

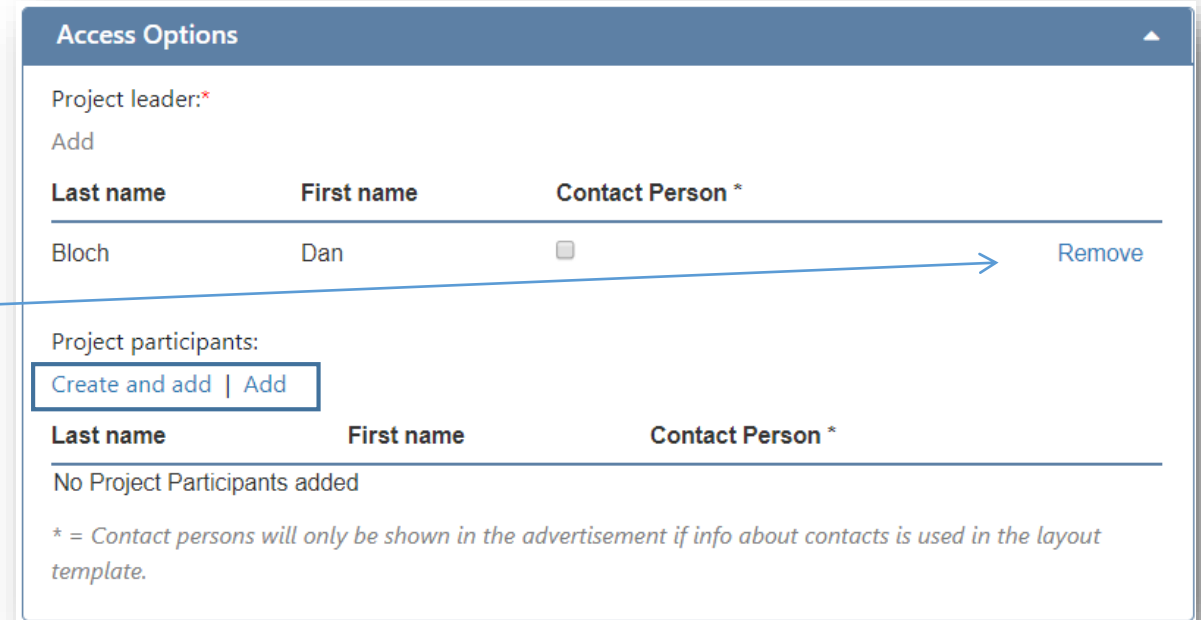
Position category:

Project leader and participants

When creating a new project, the person creating the project, will by default be assigned as Project leader.

If Project leader should be someone else, ensure to update the Project leader on the project. (Please note, that proper role must be assigned to become project leader).

Project participants are added under the Project leader either by 'Add' from the existing user list or by 'Create and add'.



The screenshot shows a dialog box titled "Access Options". It contains two main sections: "Project leader:" and "Project participants:". The "Project leader:" section has an "Add" button and a table with columns "Last name", "First name", and "Contact Person *". A row is shown with "Bloch" and "Dan", and a "Remove" button. The "Project participants:" section has a "Create and add | Add" button and a table with the same columns. Below the table, it says "No Project Participants added". A footnote at the bottom explains the asterisk: "* = Contact persons will only be shown in the advertisement if info about contacts is used in the layout template." Two blue arrows point from the text blocks to the "Remove" button and the "Create and add | Add" button respectively.

Last name	First name	Contact Person *
Bloch	Dan	<input type="checkbox"/>

Remove

Project participants:

Create and add | Add

Last name	First name	Contact Person *
No Project Participants added		

* = Contact persons will only be shown in the advertisement if info about contacts is used in the layout template.

Create and add project participant

Project participants can be created and added from project, if the user is not in system already. Please see our 'Quick Guide – User administration' for how to create new user.

Account details

User account

User name

User name (e-mail adress)

Password

Repeat password

Name


First name

Last name

Title

Phone

Mobile phone



Upload

Access level

Add

Alias	Department	Role	Action
No records to display			

Statistics

Last login

Account created

Last updated

Password Last Updated

Number of logins

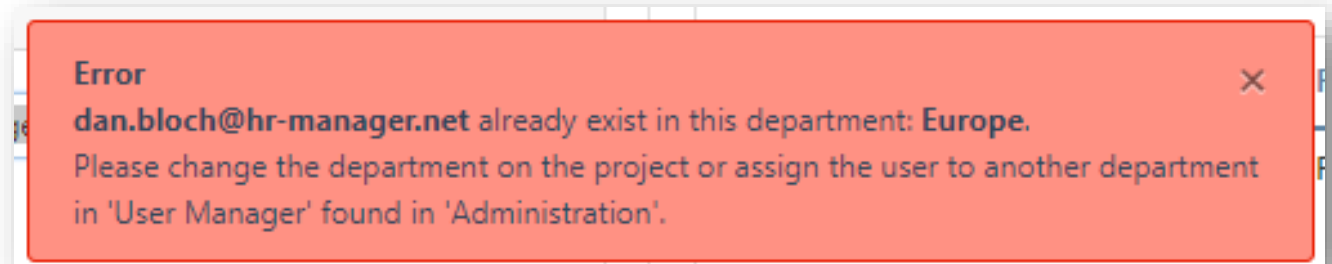
The username already exists

If user is not to be found in the existing user list when clicking 'Add', and you experience the following message when trying to 'Create and add', user may already exist in the system in another department or with wrong user role.

The following message may appear; 'User already exist'.

This can often be caused by the fact, that the user does not have access to the department, your project is created in.

To rectify, either change the department in the user profile or in the project, or please contact your administrator for assistance.

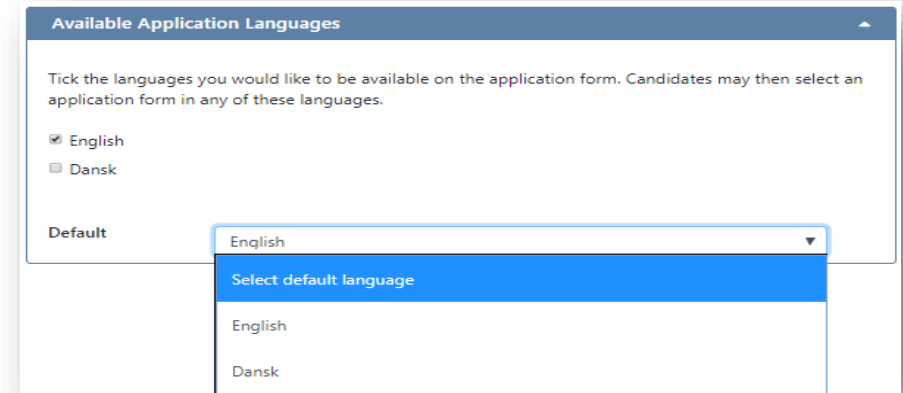


Available Application Languages

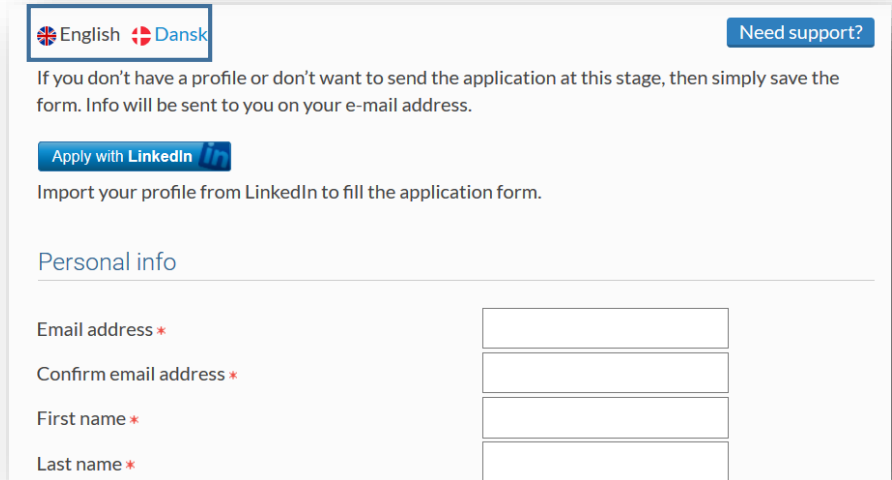
If your company has several languages available in the system, it is possible to select which language should be available to apply on on the application form.

The default language selected in the project wizard, will be displayed on the application form.

When more languages are selected, candidates can choose their preferred language on the form.



This screenshot shows a configuration window titled "Available Application Languages". It contains a list of languages with checkboxes: "English" (checked) and "Dansk" (unchecked). Below this, a "Default" section features a dropdown menu currently showing "English". A blue highlight is visible over the "Select default language" option in the dropdown.



This screenshot shows the application form interface. At the top, a language selector displays "English" and "Dansk" with their respective flags. A "Need support?" link is in the top right. Below the language selector, there is a message about saving the form if the user doesn't have a profile. A button labeled "Apply with LinkedIn" is present, followed by a prompt to import a LinkedIn profile. The "Personal info" section contains four input fields: "Email address", "Confirm email address", "First name", and "Last name", each with a red asterisk indicating it is a required field.

Notes and Attachments

Notes and attachments can be added, if required.

To add notes, simply enter text in the notes box and click 'Add'.

Notes will be displayed on the project list with a tag.

To add attachments, like project documents, just click 'Click here to add attachment'. Select file to upload and define category.

Notes

Add

Note	Author	Date	Actions
No Project Note added			

Notes will only be visible in the system for users that have access to the project. You can see the internal notes in the tab "Project Details" or from the project list on the page "Home".

Attachments

[Click here to add attachment](#)

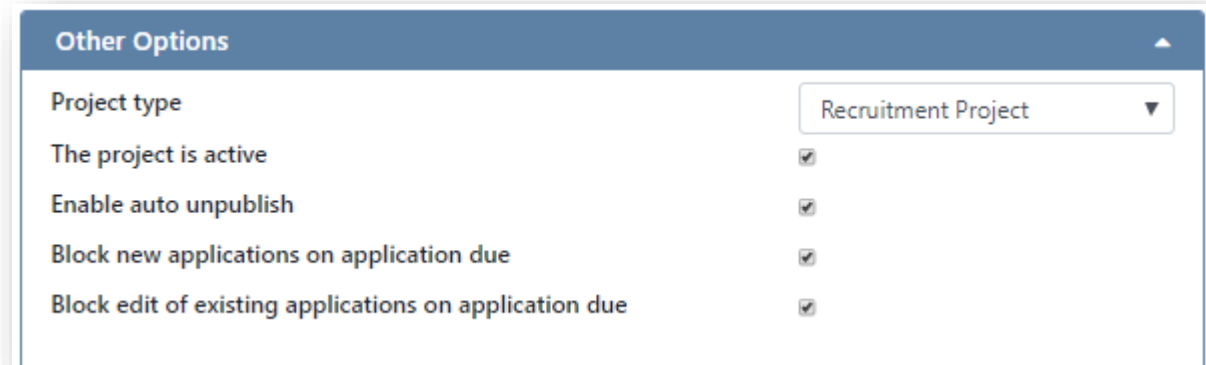
Name	Size	Modified
No Project Document added		

The document is for internal use and will only be visible for users with access to the project, unless you have linked to it in the advertisement or likewise. It will be visible on the tab "Project Details" or from the project list on the page "Home".

Other options

Under this section the following can be adjusted:

- **Project type** – Define type of project; ‘Recruitment’ or ‘CV database’
 - Some may have ‘Test’ as well.
- **The project in active** – Defines if project is active/inactive
- **Enable auto unpublish** - Advertisement is unpublished automatically when expired
- **Block new applications on application due** - Locks the application form once 'application due' is passed
- **Block edit of existing applications on application due** - Determines, if candidates can make any modifications in application after 'application due' is passed



The screenshot shows a window titled "Other Options" with a blue header bar. Inside the window, there are five settings:

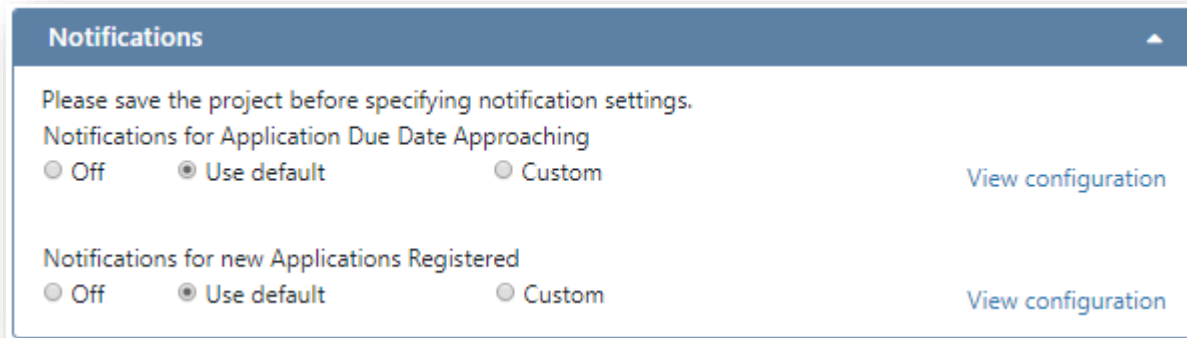
Setting	Value/Status
Project type	Recruitment Project (dropdown menu)
The project is active	<input checked="" type="checkbox"/>
Enable auto unpublish	<input checked="" type="checkbox"/>
Block new applications on application due	<input checked="" type="checkbox"/>
Block edit of existing applications on application due	<input checked="" type="checkbox"/>

Notifications

You can enable different notifications on the project.
Default setting is to be done in Administration under Notification Center.

The most common notifications are these:

- **Notifications for Application Due Date Approaching**
- **Notifications for new Applications Registered**

A screenshot of a software window titled "Notifications". The window has a dark blue header bar with the title and a small upward-pointing triangle icon. The main content area is white and contains the following text: "Please save the project before specifying notification settings." followed by two sections. The first section is "Notifications for Application Due Date Approaching" with three radio button options: "Off", "Use default" (which is selected), and "Custom". To the right of these options is a link that says "View configuration". The second section is "Notifications for new Applications Registered" with the same three radio button options: "Off", "Use default" (selected), and "Custom". To the right of these options is another link that says "View configuration".

Notifications

Please save the project before specifying notification settings.

Notifications for Application Due Date Approaching

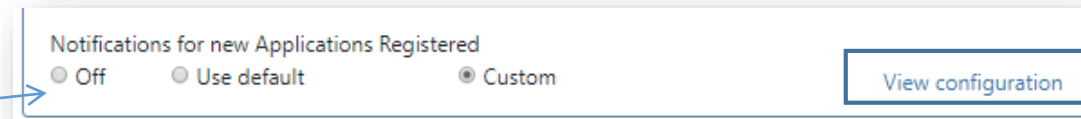
☐ Off ☒ Use default ☐ Custom [View configuration](#)

Notifications for new Applications Registered

☐ Off ☒ Use default ☐ Custom [View configuration](#)

Modifying notifications

To modify the 'default' notification setting on the project, click on the 'Custom' setting and then 'View configuration'.



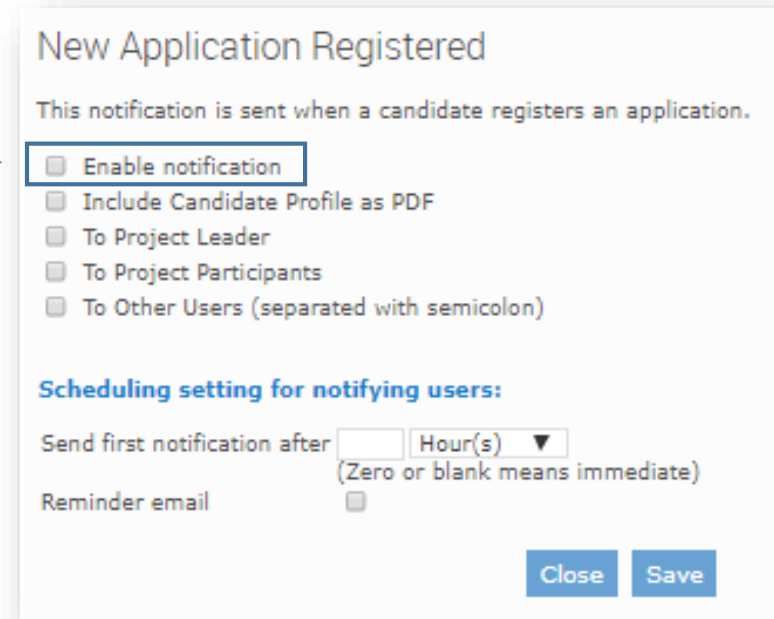
Notifications for new Applications Registered

☐ Off ☐ Use default ☒ Custom

[View configuration](#)

Adjust the setting as required.

Tick the box 'Enabled' and all other option you want activated and then 'Save'.



New Application Registered

This notification is sent when a candidate registers an application.

☒ Enable notification

☐ Include Candidate Profile as PDF

☐ To Project Leader

☐ To Project Participants

☐ To Other Users (separated with semicolon)

Scheduling setting for notifying users:

Send first notification after Hour(s) ▼
(Zero or blank means immediate)

Reminder email ☐

[Close](#) [Save](#)

Furthermore, ensure to click 'Save' in the project wizard to save the notification setting.

Communication

The available email templates for the project, are all displayed under the tab 'Communication'

To open/modify click on the icon displayed to the right beside the template name.

Please note, that any modifications will only apply for the that particular project.

Project Details **Communication** Questionnaire Advertisement Application Redirection Confirmation

Communication

On this page you can modify communication templates to be used in the current project. Please note that default communication templates must be modified in Administration.

Candidate

Communication Template Title	EN
Email	Add new Email Template
Exclude Copy Rejection of Application	
Exclude Copy Rejection after interview	
Exclude Copy Rejection after questionnaire	
Exclude Copy Rejection after screening	
Exclude Copy Application receipt (Auto)	
Exclude Copy Invitation Interview	
Exclude Copy Invitation Interview 2	
Exclude Copy Invitation Interview 3	
Exclude Copy Invitation to questionnaire	

☐ Show excluded templates

(!) = Template contains no text.

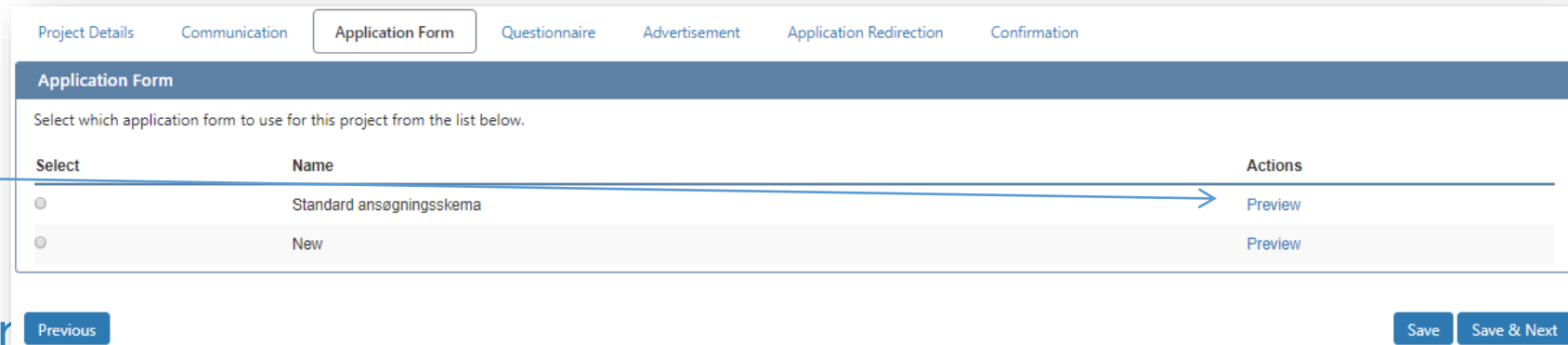
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Application form

Under the tab 'Application form', you can select which form to use on the project.

To preview the application form, click 'Preview'.

If this tab is not visible, your company may only use one specific application form.



Project Details Communication **Application Form** Questionnaire Advertisement Application Redirection Confirmation

Application Form

Select which application form to use for this project from the list below.

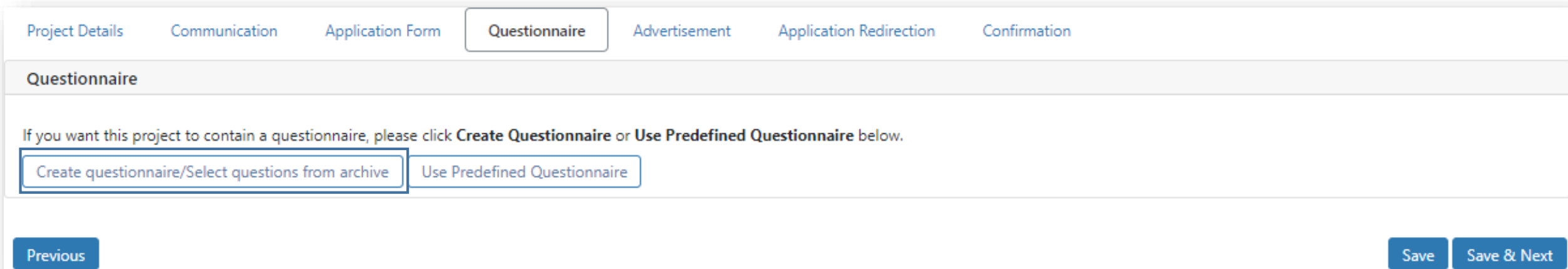
Select	Name	Actions
<input type="radio"/>	Standard ansøgningsskema	Preview
<input type="radio"/>	New	Preview

Previous Save Save & Next

Questionnaire

If Questionnaire is enabled for your company, the tab 'Questionnaire' will be visible and you can create and attach a questionnaire to the project.

Either create a new one on the project or select a predefined.



The screenshot shows a web interface with a horizontal navigation bar at the top containing the following tabs: 'Project Details', 'Communication', 'Application Form', 'Questionnaire' (which is highlighted with a blue border), 'Advertisement', 'Application Redirection', and 'Confirmation'. Below the navigation bar is a section titled 'Questionnaire'. Inside this section, there is a text instruction: 'If you want this project to contain a questionnaire, please click **Create Questionnaire** or **Use Predefined Questionnaire** below.' Below this text are two buttons: 'Create questionnaire/Select questions from archive' and 'Use Predefined Questionnaire'. At the bottom of the interface, there is a 'Previous' button on the left and 'Save' and 'Save & Next' buttons on the right.

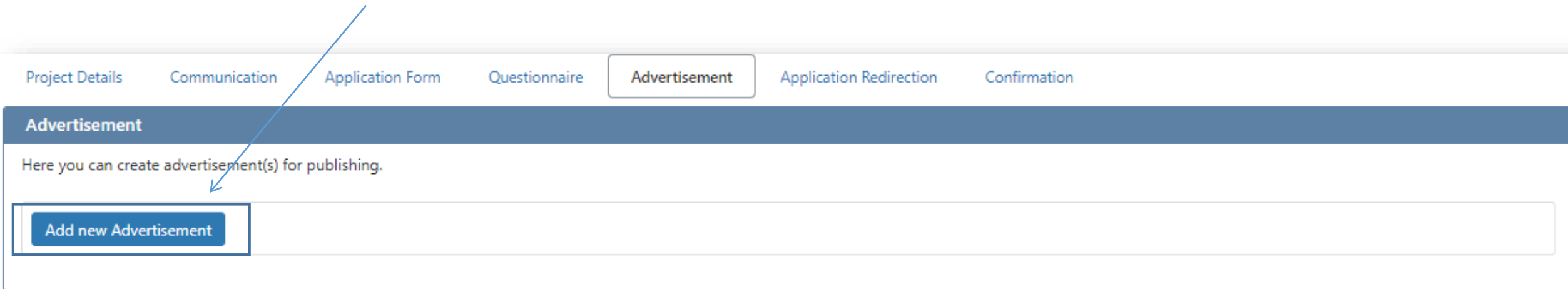
Please see 'Quick Guide – Questionnaire' for further information about Questionnaire.

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Advertisement

Create advertisement under the tab 'Advertisement' and publish on medias.

Click 'Add new Advertisement' to start creating advertisement.



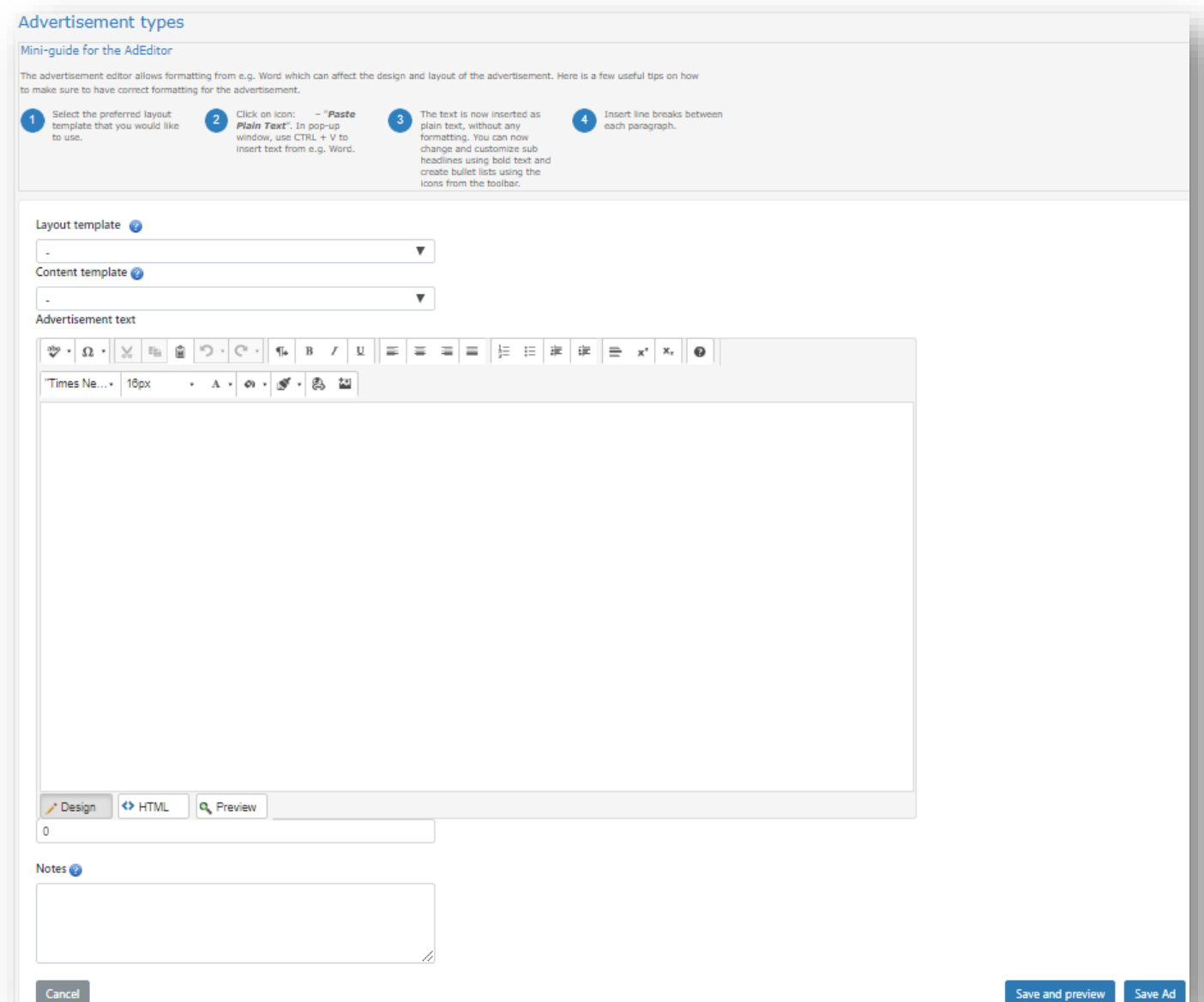
The screenshot shows a web application interface with a horizontal navigation bar at the top. The navigation bar contains several tabs: 'Project Details', 'Communication', 'Application Form', 'Questionnaire', 'Advertisement', 'Application Redirection', and 'Confirmation'. The 'Advertisement' tab is currently selected and highlighted with a blue background. Below the navigation bar, there is a dark blue header bar with the word 'Advertisement' in white text. Underneath this header, the text 'Here you can create advertisement(s) for publishing.' is displayed. At the bottom of the page, there is a large white rectangular area. On the left side of this area, there is a blue button with the text 'Add new Advertisement' in white. A blue arrow points from the text 'Click 'Add new Advertisement' to start creating advertisement.' to this button.

Project Details Communication Application Form Questionnaire **Advertisement** Application Redirection Confirmation

Advertisement

Here you can create advertisement(s) for publishing.

Add new Advertisement



Advertisement

The advertisement is now ready to be published.

Select the medias to publish to in the dropdown list. Select by choosing media and then click 'Add'.

Once all medias have been selected and dates defined, tick the medias and click 'Publish'.

The red dot will now turn green and the advertisement is published.

Advertisement

Here you can create advertisement(s) for publishing.

Advertisements

Below you can see list of published media.

Advertisement

Publishing

Select media

Cost

DKK

Add

Media	Action	Cost	Start Date	End Date	
× Homepage		0	9/10/2018	9/11/2018	Unpublished

Notes:

Add new Advertisement

Un-Publish Publish

Media	Action	Cost	Start Date	End Date	
× Homepage		0	9/10/2018	9/11/2018	Published

Confirmation

Under the last tab 'Confirmation' the following links can be found:

- Link to the advertisement
- Link to the application form

Furthermore, you can send invitations to the project participants with information about the project.

Project Details Communication Application Form Questionnaire Advertisement Application Redirection **Confirmation**

Project created/updated
The project is now created/updated.

Links

Below is a list of all advertisements created in this project and a list of media where the advertisements are published. The list also contains links for each media. You can use these links if you want to send links manually by e-mail, or publish them on other websites. It is important that you use the right link in order to get an accurate Media Tracking.

Link details

Advertisement ID 99053

Media	Link
Homepage	https://candidate.hr-manager.net/ApplicationInit.aspx?cid=1816&ProjectId=143577&DepartmentId=18956&MediaId=5

Link to Application Form

Use the link below if you need a link that will not display the advertisement. Candidates will be brought directly to the application form.

<https://candidate.hr-manager.net/ApplicationInit.aspx?cid=1816&ProjectId=143577&DepartmentId=18956&SkipAdvertisement=true>

Invite project users

An invitation will be sent to all the selected users. Users who are already invited to this project will not be selected by default.

If you do not want to send invitations now, click **Skip Invitations**. You may send the invitations later.

Project Participant				
Select	Last name	First name	Email/Username	Invitation sent
<input checked="" type="checkbox"/>	Bloch	Dan	dan.bloch@hr-manager.net	

[Skip invitations](#) [Preview and send invitations](#)

[Previous](#) [Finish](#)

[Back to overview](#)

Your project is now created

Please contact Support for any further information 😊

Tel: +45 72 44 06 44

Email: support@hr-manager.net

[Chat with us](#)



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