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.

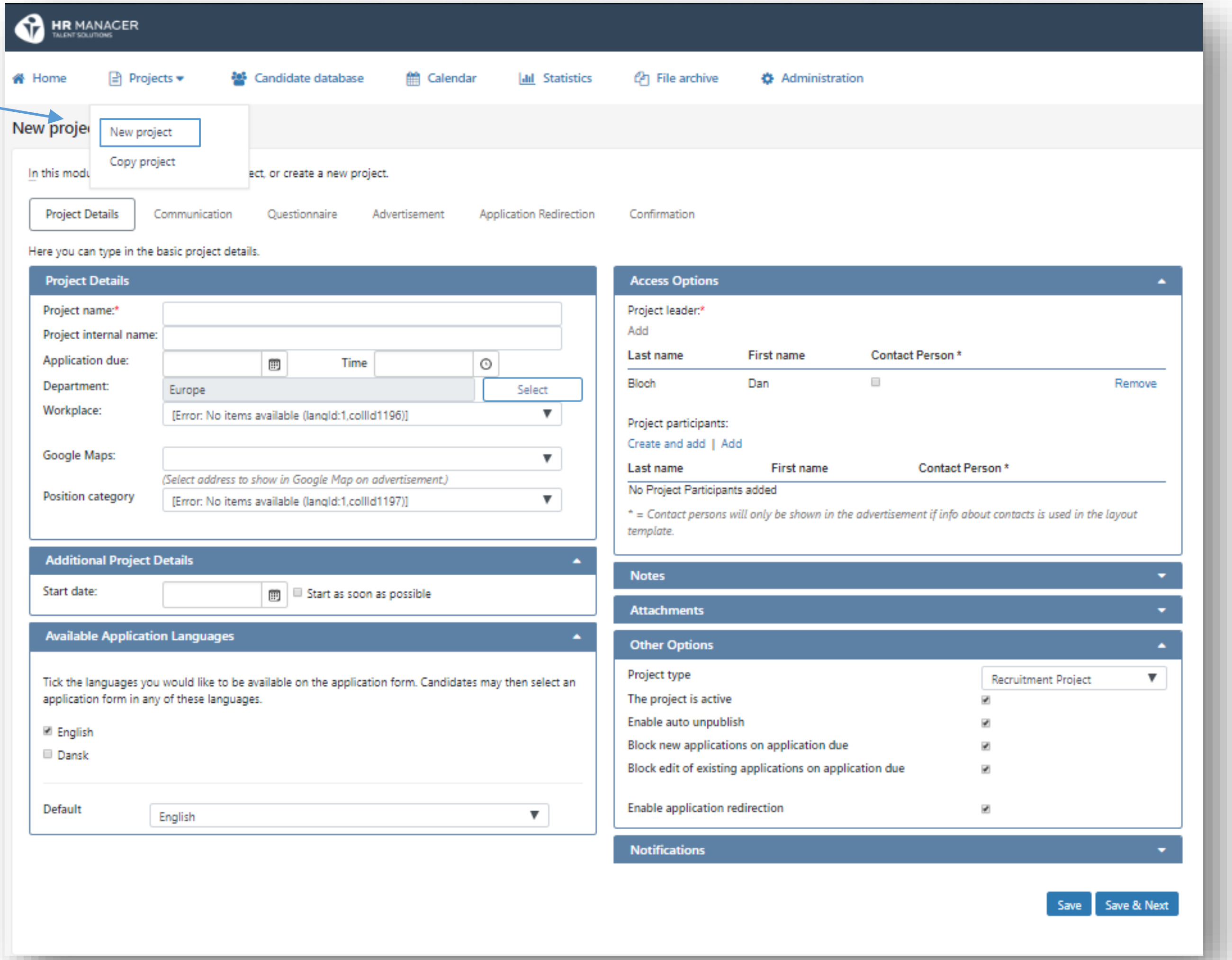
In this guide, these steps will be explained as well as a few tips:

- 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
- Notifications
- Modifying notifications
- Communication
- Application form
- 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.

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Project Details

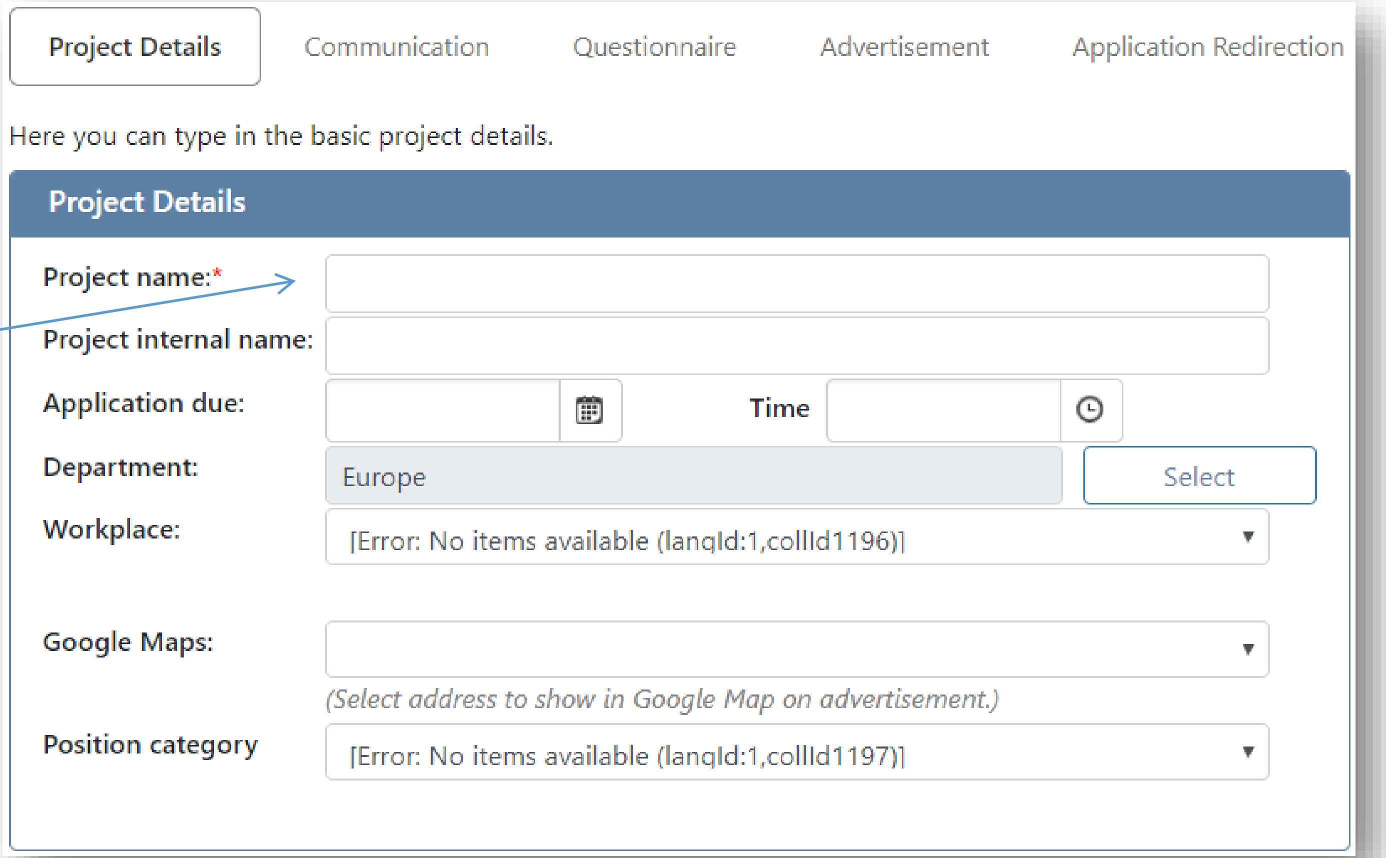
The first tab is called 'Project Details'.

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.



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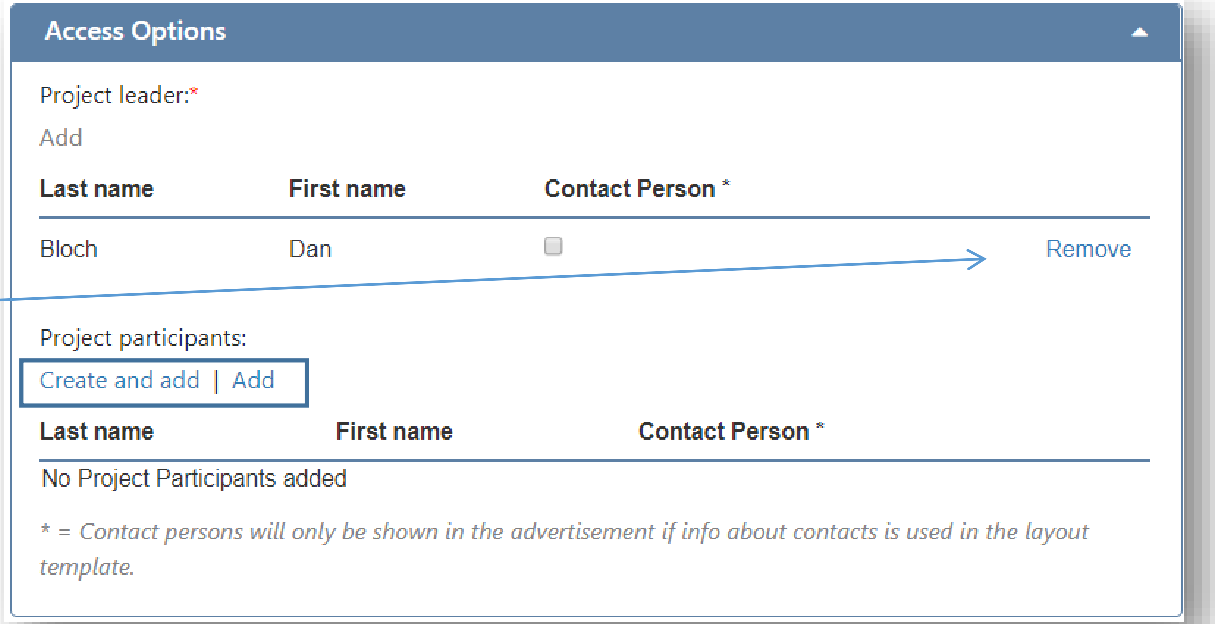
Project leader and participants

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'.



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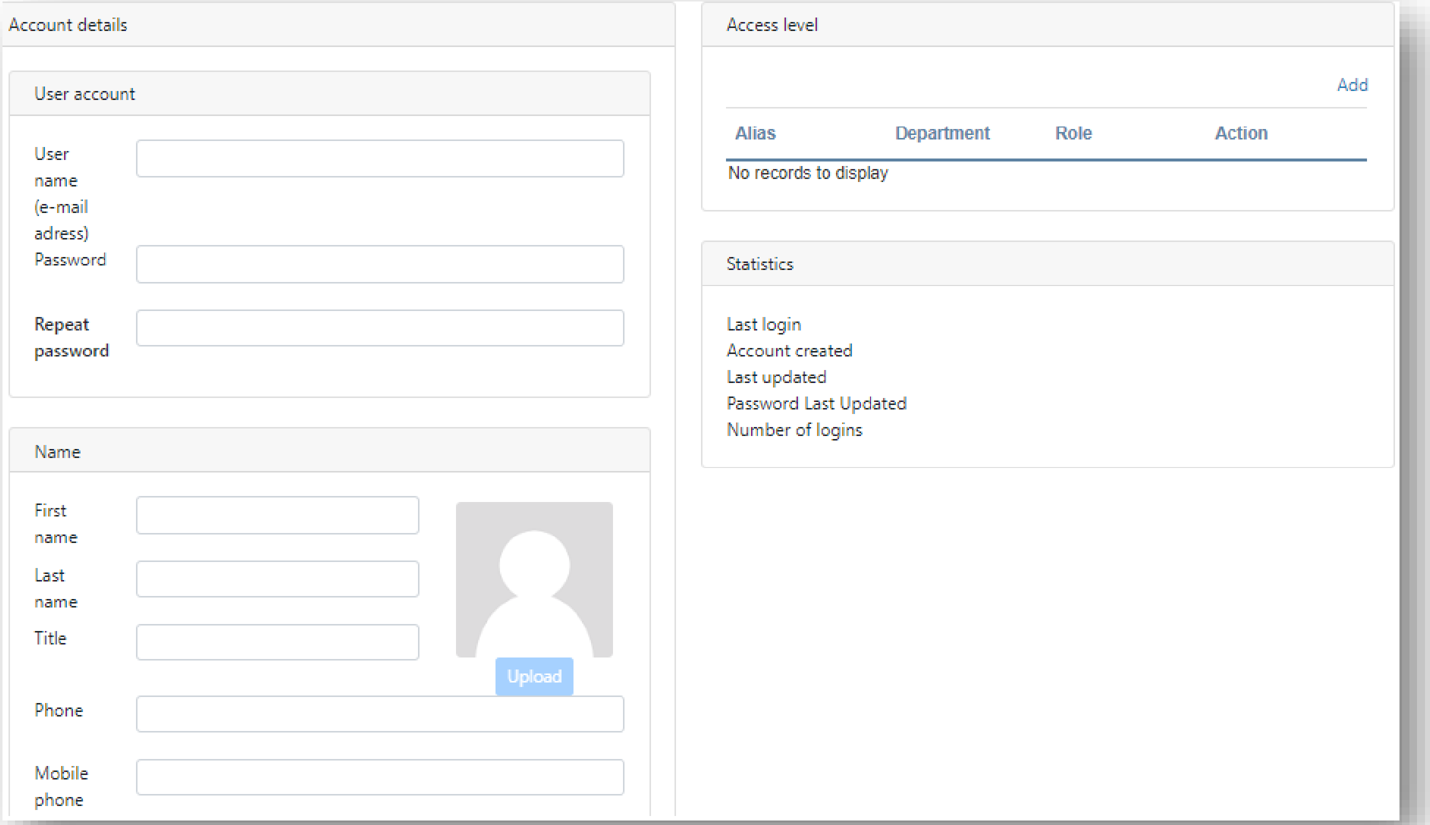
Create and add project participant

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.



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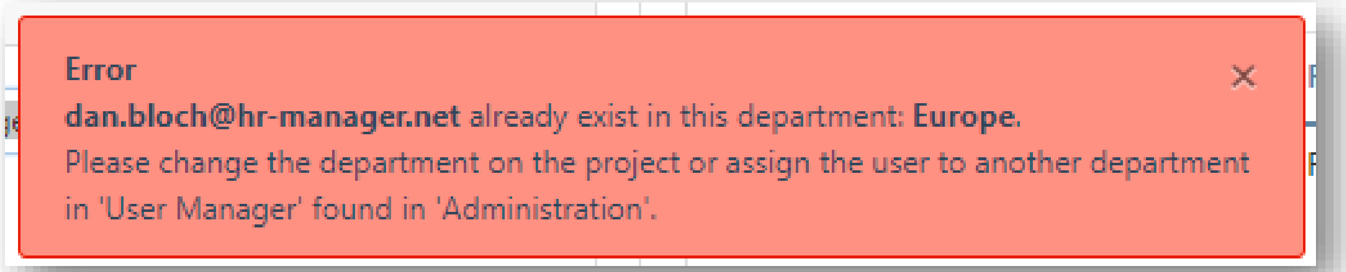
The username already exists

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.



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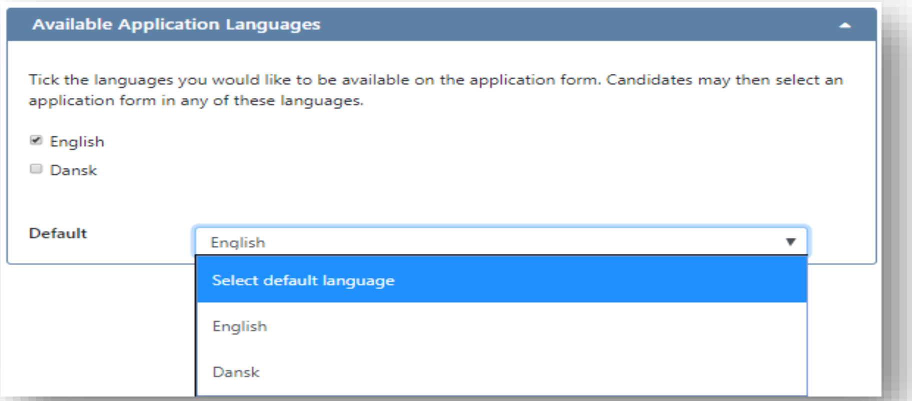
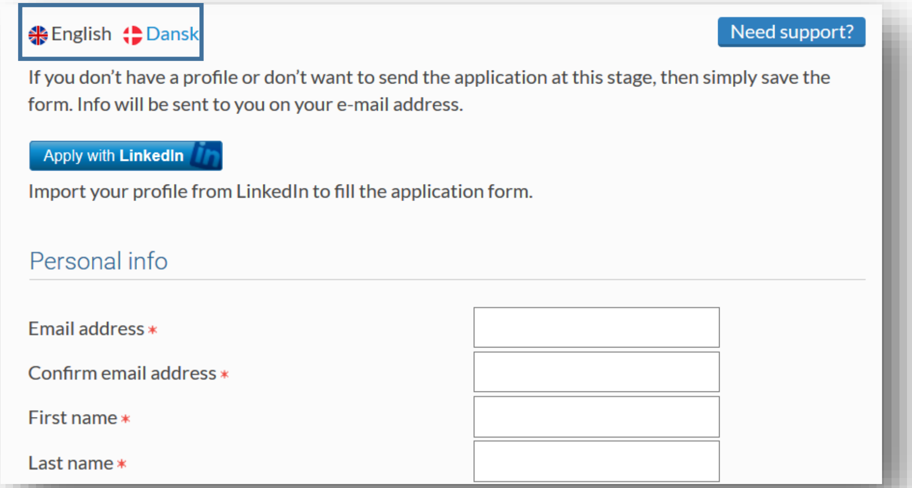
Available Application Languages

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.



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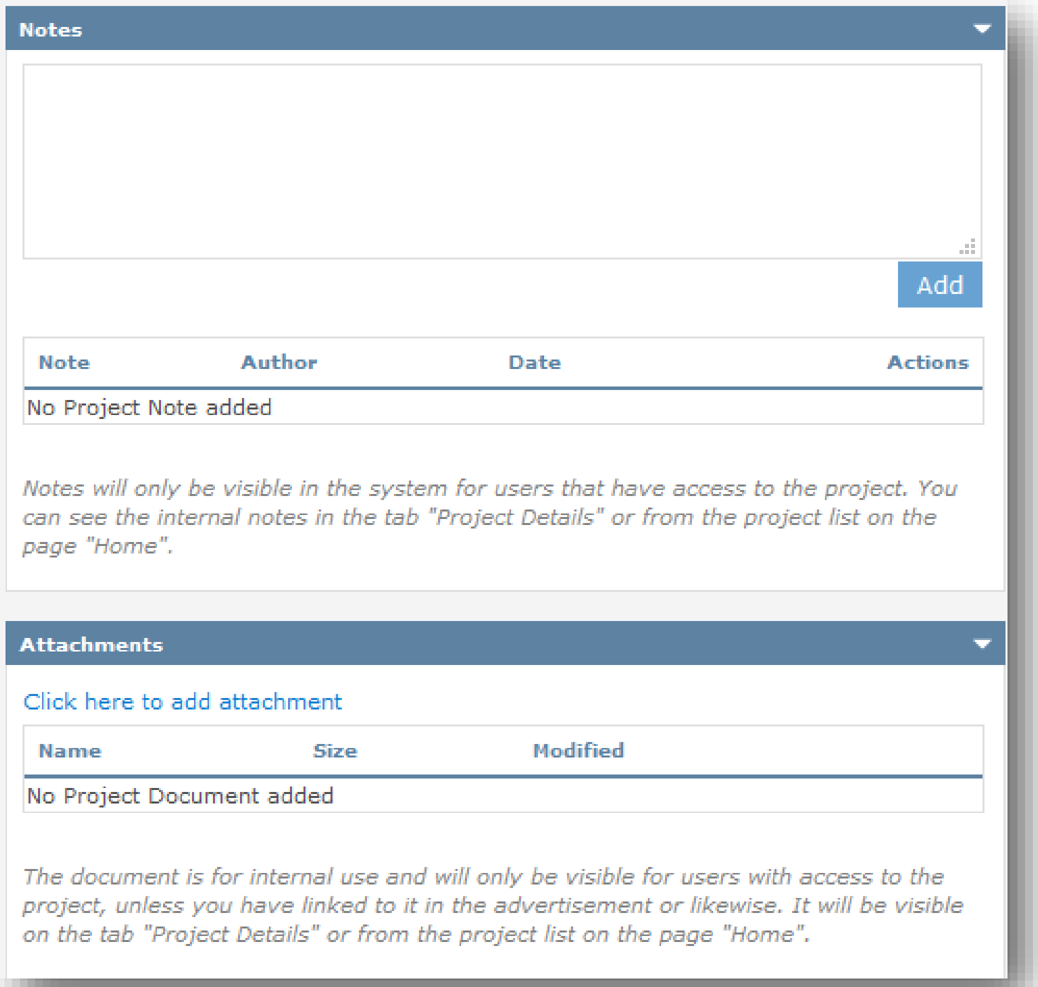
Notes and Attachments

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.



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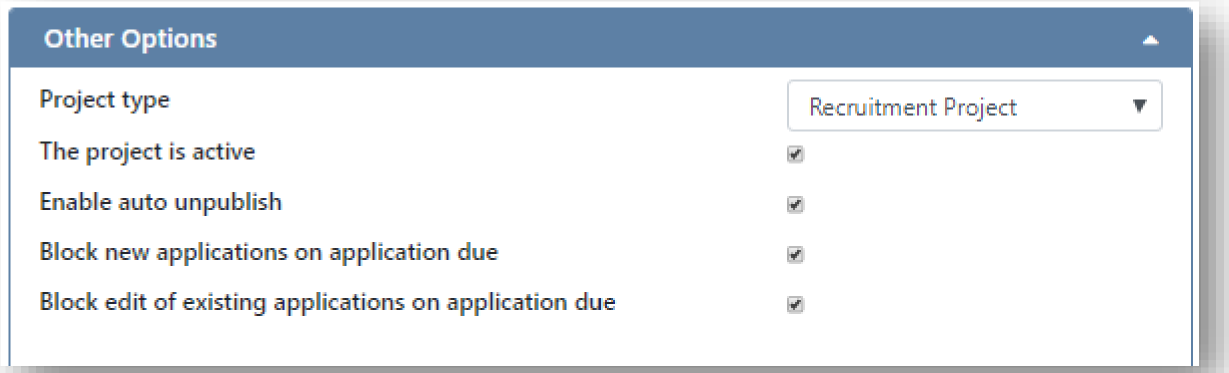
Other options

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



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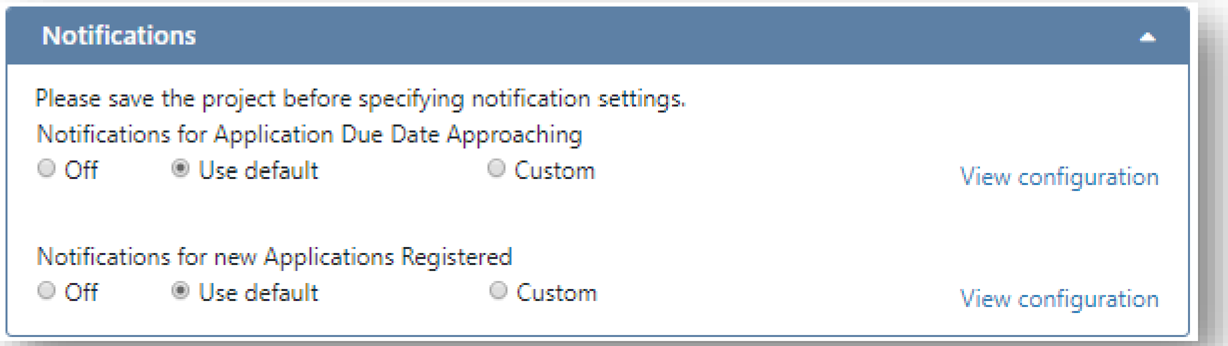
Notifications

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**



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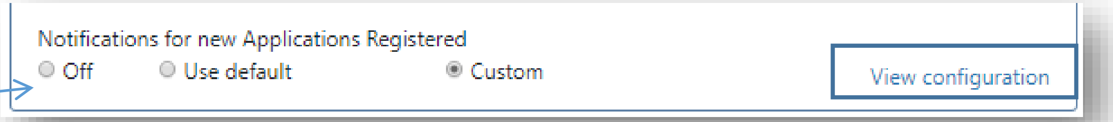
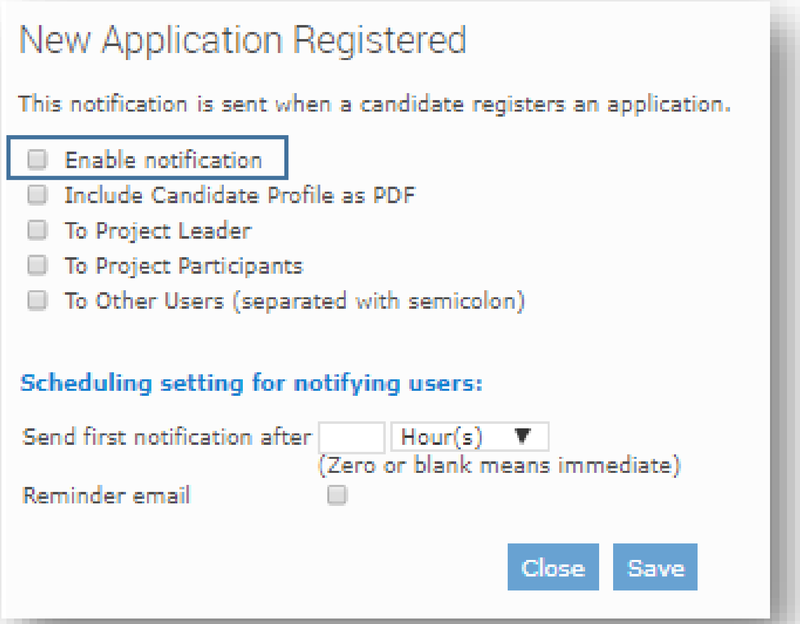
Modifying notifications

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



Adjust the setting as required.

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



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

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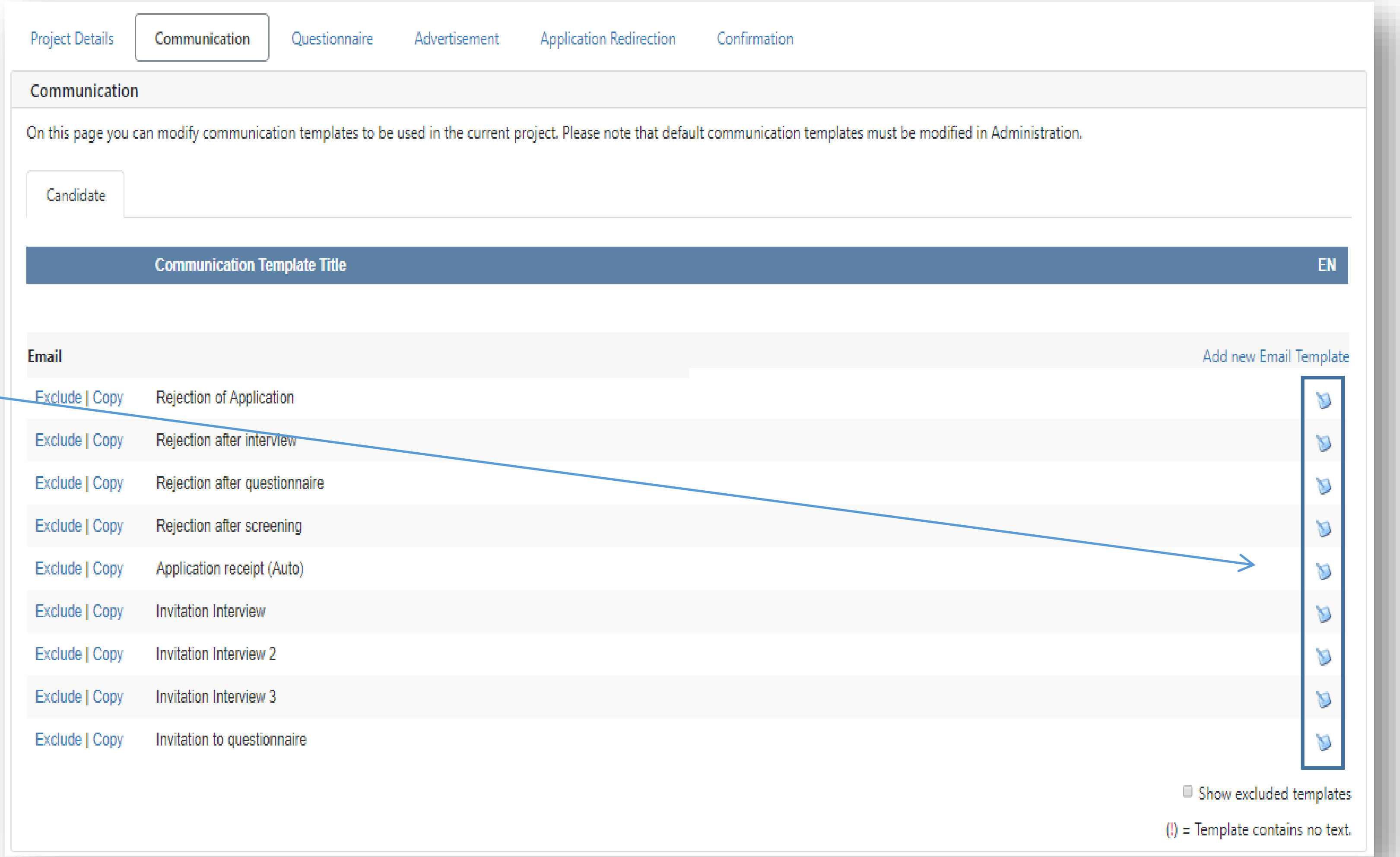
Communication

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.



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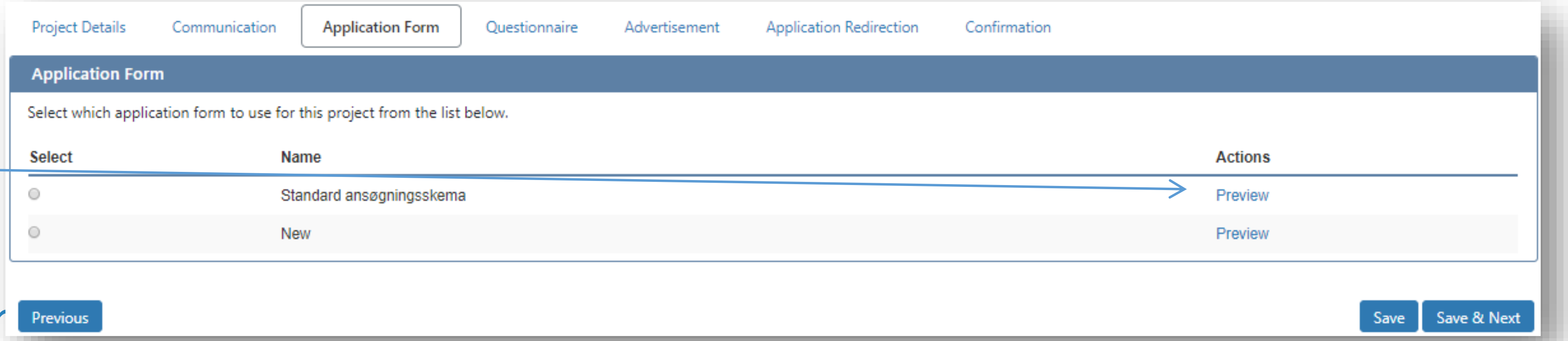
Application form

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.



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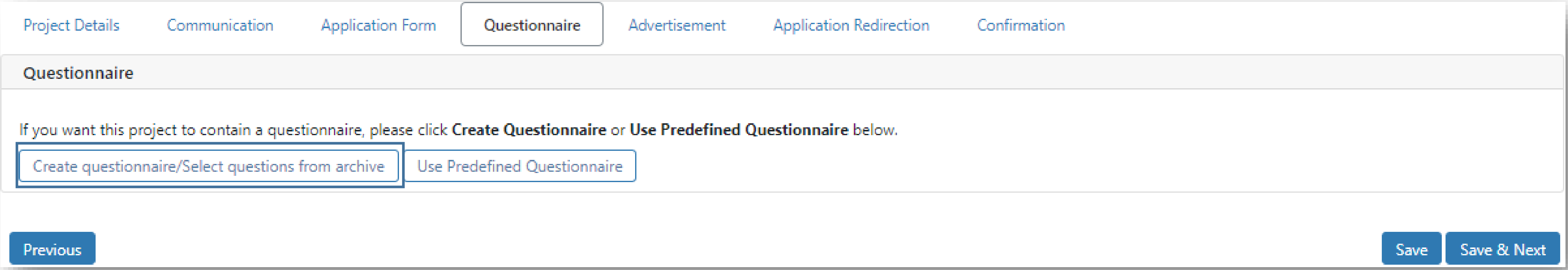
Questionnaire

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 on the project or select a predefined.



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

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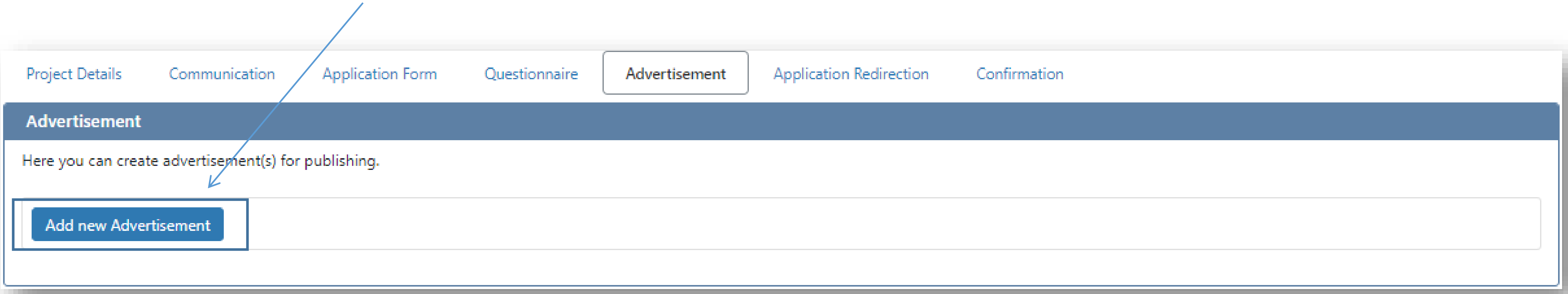
Advertisement

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

Click 'Add new Advertisement' to start creating advertisement.

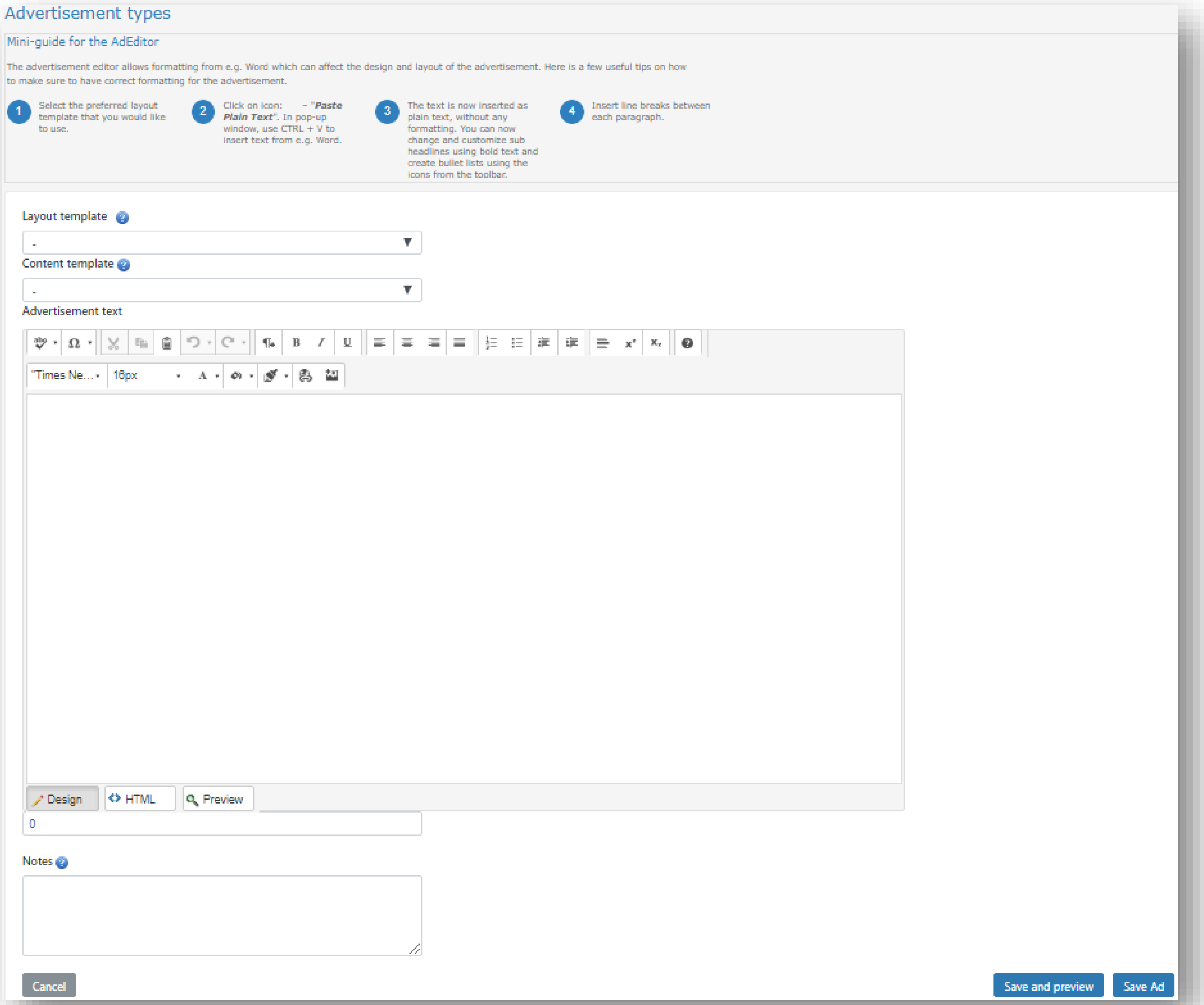


Advertisement

Create the advertisement in the AdEditor by:

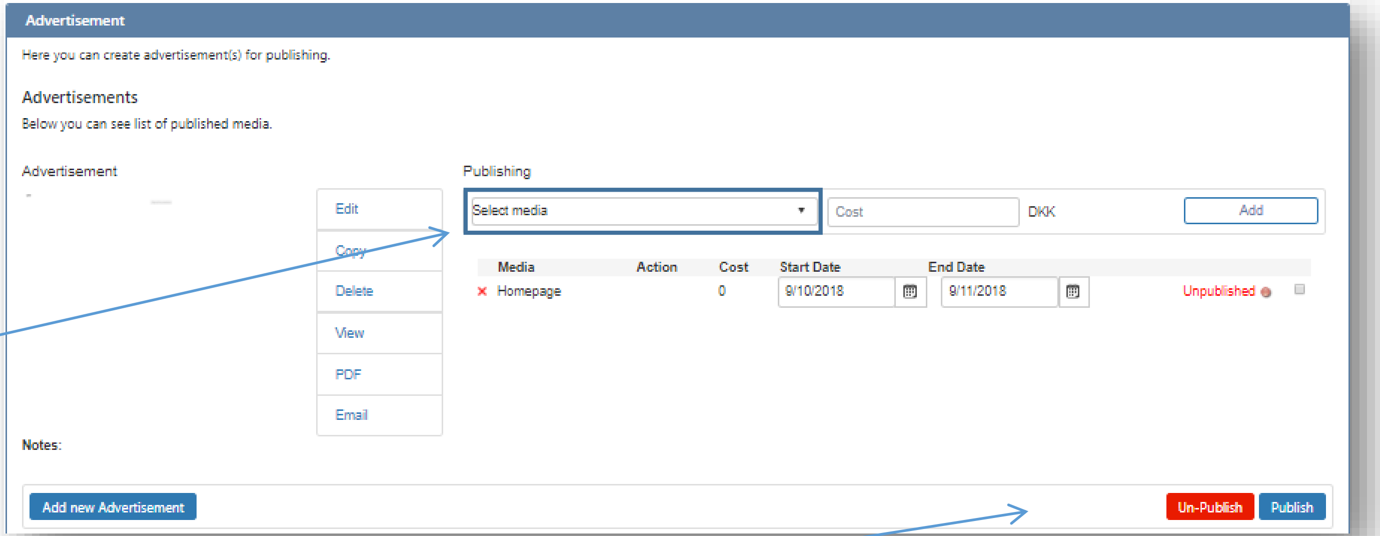
- Select ‘Layout template’
- Select image, if no permanent image is used in your template
- Write the content of the advertisement

Save and see preview when done.



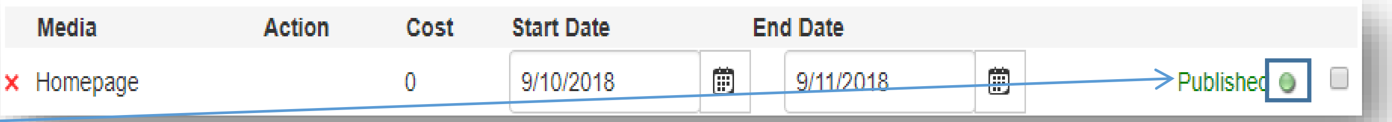
Advertisement

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.

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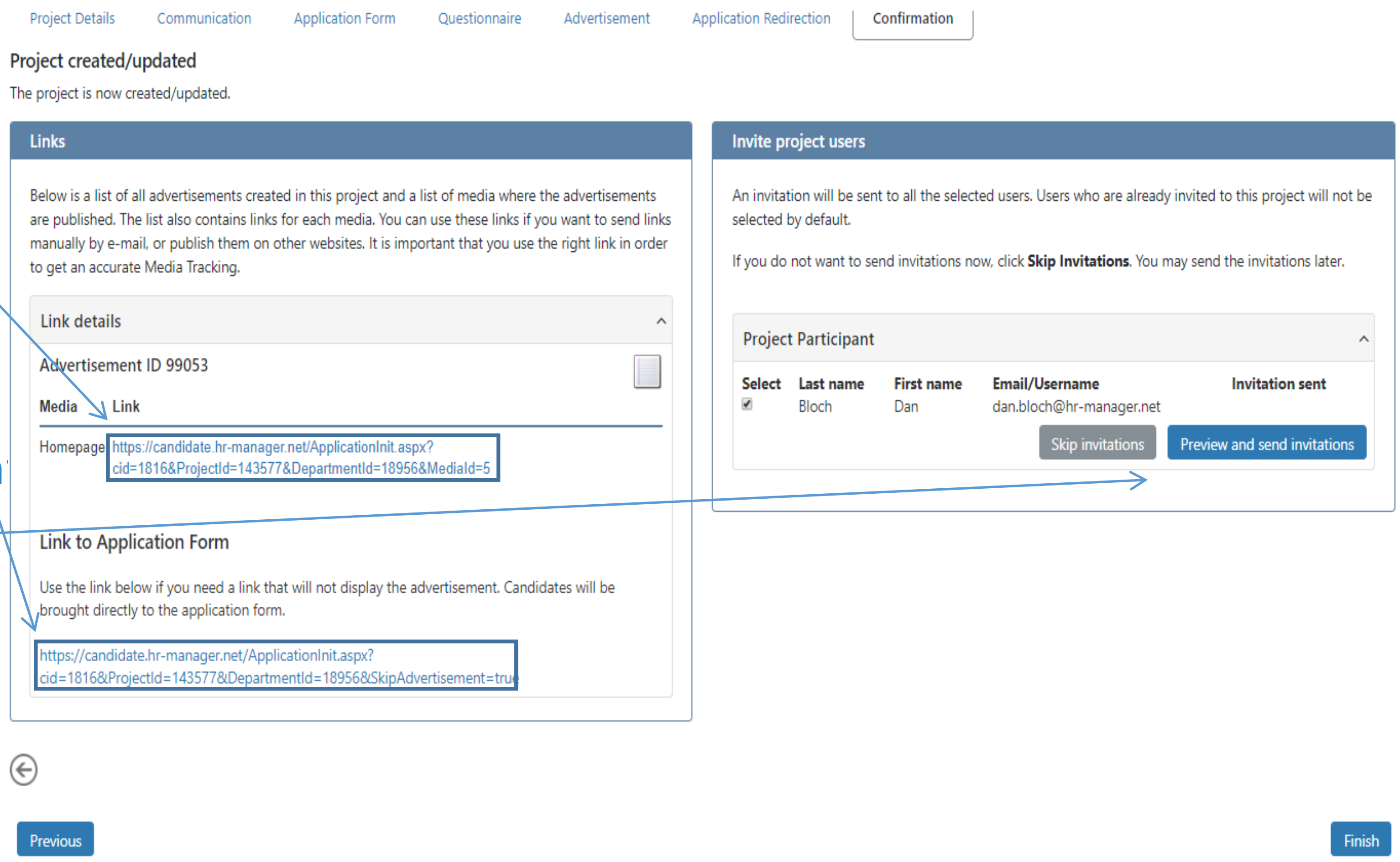
Confirmation

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 participan with information about the project.



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Your project is now created

Please contact Support for any further information ☺

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