Business Solution ELO HR Recruiting

Business Solution ELO HR Recruiting 1.03

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Introduction

Structure of the documentation

The goal of this documentation is to explain all functions of Business Solution ELO HR Recruiting.

Basics

The Basics chapter explains the basics of the ELO HR Recruiting program interface.

Possible actions

The remaining chapters address possible actions using ELO HR Recruiting.

Target audience

This documentation is addressed to Business Solution ELO Recruiting users. Separate documentation is available for administrators on the ELO SupportWeb.

The scope of functions presented in this documentation may differ greatly from those in your client.

If you do not find functions described in this documentation in your client, you do not have permission to perform the action.

The majority of functions can only be performed by employees of the HR department. Only the Submit personnel request function may be performed by department heads.

Basics

Basic principle

Business Solution ELO HR Recruiting covers the entire recruitment process within a company, from submitting a job request to hiring or turning down a candidate.

You can also publish job postings and accept applications on connected job portals.

General note

ELO HR Recruiting works with the following clients:

- ELO Web Client
- ELO Java Client
- ELO Desktop Client

> **Information**
>
> In this documentation, we use screenshots from the ELO Web Client.

Refer to the specific ELO client documentation for more details on how they work in general.

Requirements

Your administrator must have configured ELO HR Recruiting for you.

Program interface

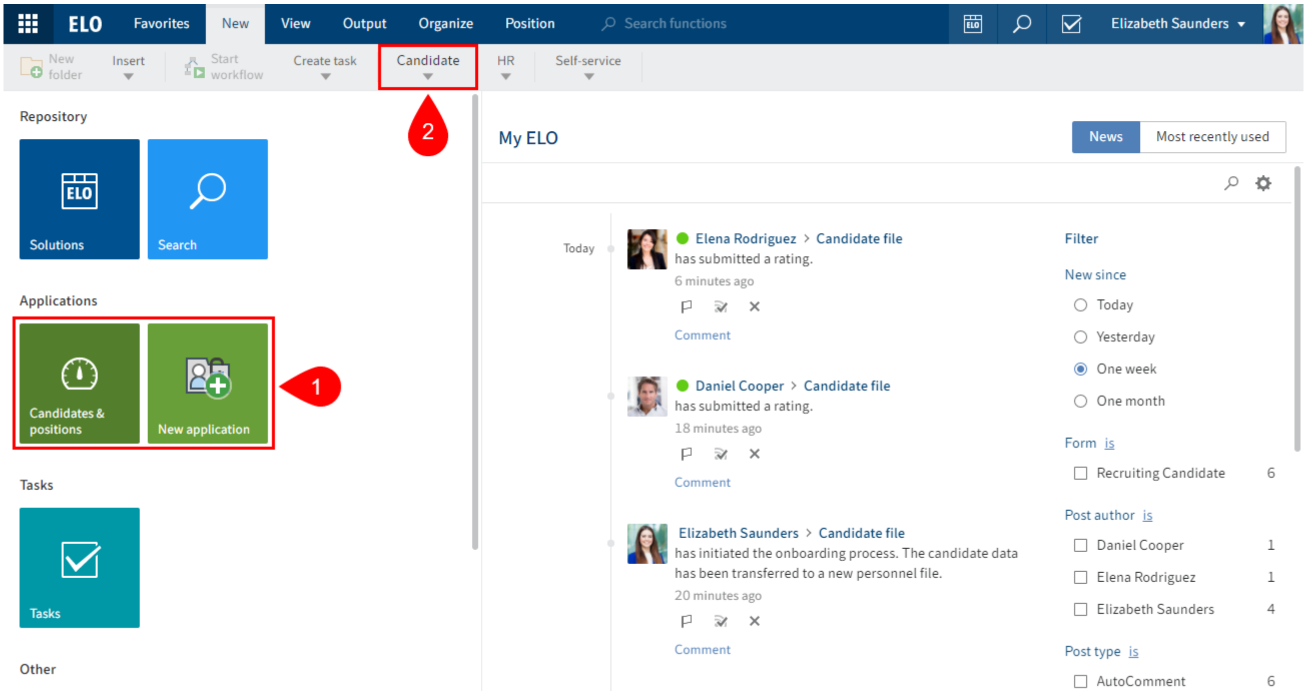


Fig.: Business Solution ELO HR Recruiting program interface

You will find ELO HR Recruiting functions in the following areas:

1 Candidates & positions and New application tiles in the tile navigation area

The screenshot shows all ELO HR Recruiting tiles in a group. However, this view can vary depending on your individual configuration.

2 *Candidate* group on the *New* tab

You can use the functions in this group to create new jobs, postings, candidate pools, and applications.

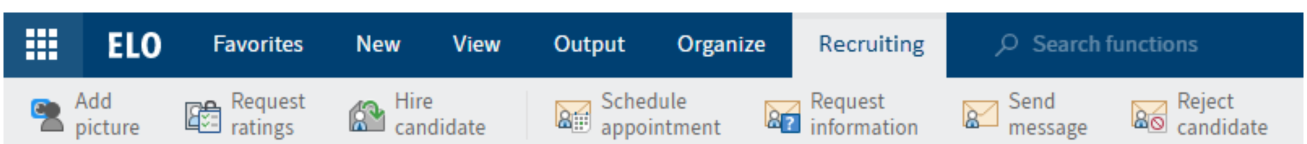


Fig.: 'Recruiting' tab

3 'Recruiting' tab

When you select a candidate, the *Recruiting* tab opens.

On this tab, you can do things such as send e-mails to candidates.

Fig.: 'Position' tab

4 *Position* tab

As soon as you select a position, the *Position* tab appears where you can close the position or publish a posting.

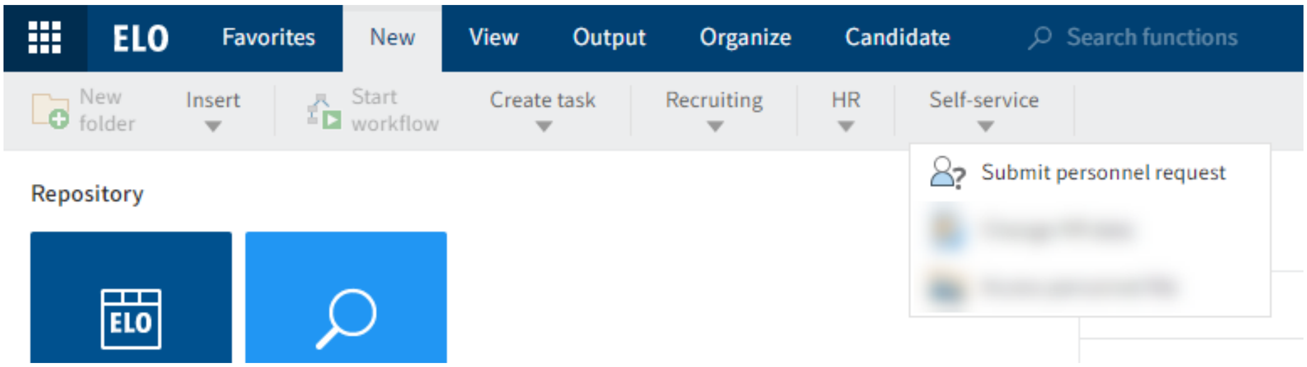


Fig.: 'Submit personnel request' function

5 Submit personnel request on the *New* tab in the *Self-service* group

The Submit personnel request function is mainly used by supervisors to notify the HR department that they have a staffing requirement.

Repository

The structure and appearance of the repository depend greatly on your specific configuration. The default state is described here.

Candidate files and positions are filed under *// Recruiting*.

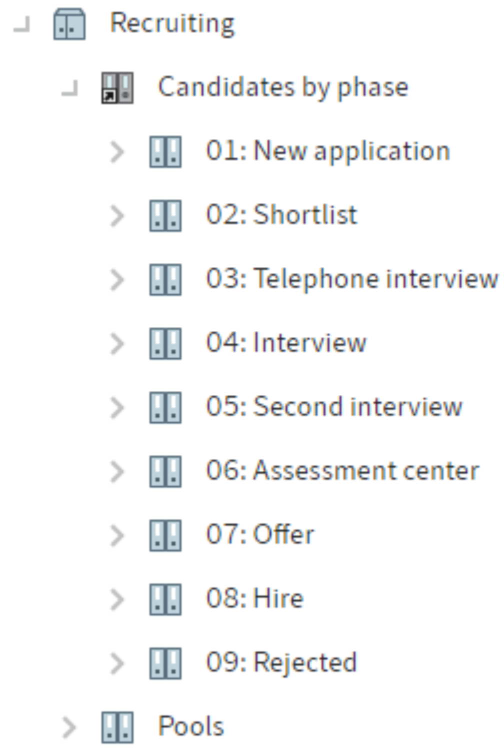


Fig.: 'Candidates by phase' and 'Pools' folders

Candidate files are filed to the *// Candidates by phase* folder.

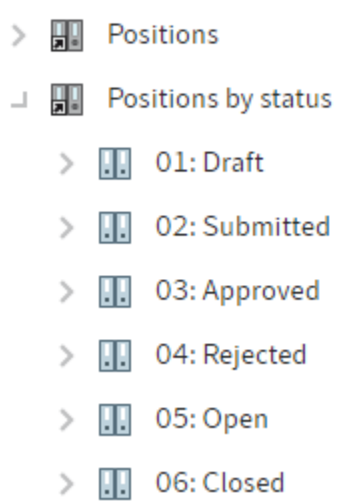


Fig.: 'Positions' and 'Positions by status' folders

Positions are filed to the *// Positions* folder and can also be accessed through the *// Positions by status* folder.

Candidate files are also assigned to the position the candidate applied to. Otherwise, they are assigned to a pool in the *// Pools* folder.

Candidate file

Candidate

Carter, Henry (D00012)

Cover sheet | Candidate data | Communication | Rating

Henry Carter
Jun 15, 1986
Digital Marketing

Candidate number	D00012
Phase	New application
Status	Received
Total score	-
Career level	Experienced
Highest education level	Bachelor's
Experience in years	5
Gender	Male
Correspondence language	English
E-mail	H.Carter866@testmail.com
Telephone	-
Mobile	+44 175 9856793243
Street	42 Winchester Road
Postal code	BH1 1AL
City	Bournmouth
Country	United Kingdom

Save | Print

Fig.: 'Candidate' form

The file of a candidate is assigned the *Candidate* form. You can store additional documents for a candidate, such as a photo, cover letter, and any correspondence in the file.

The *Candidate* form consists of the tabs *Cover sheet*, *Candidate data*, *Communication*, and *Rating*.

Position file

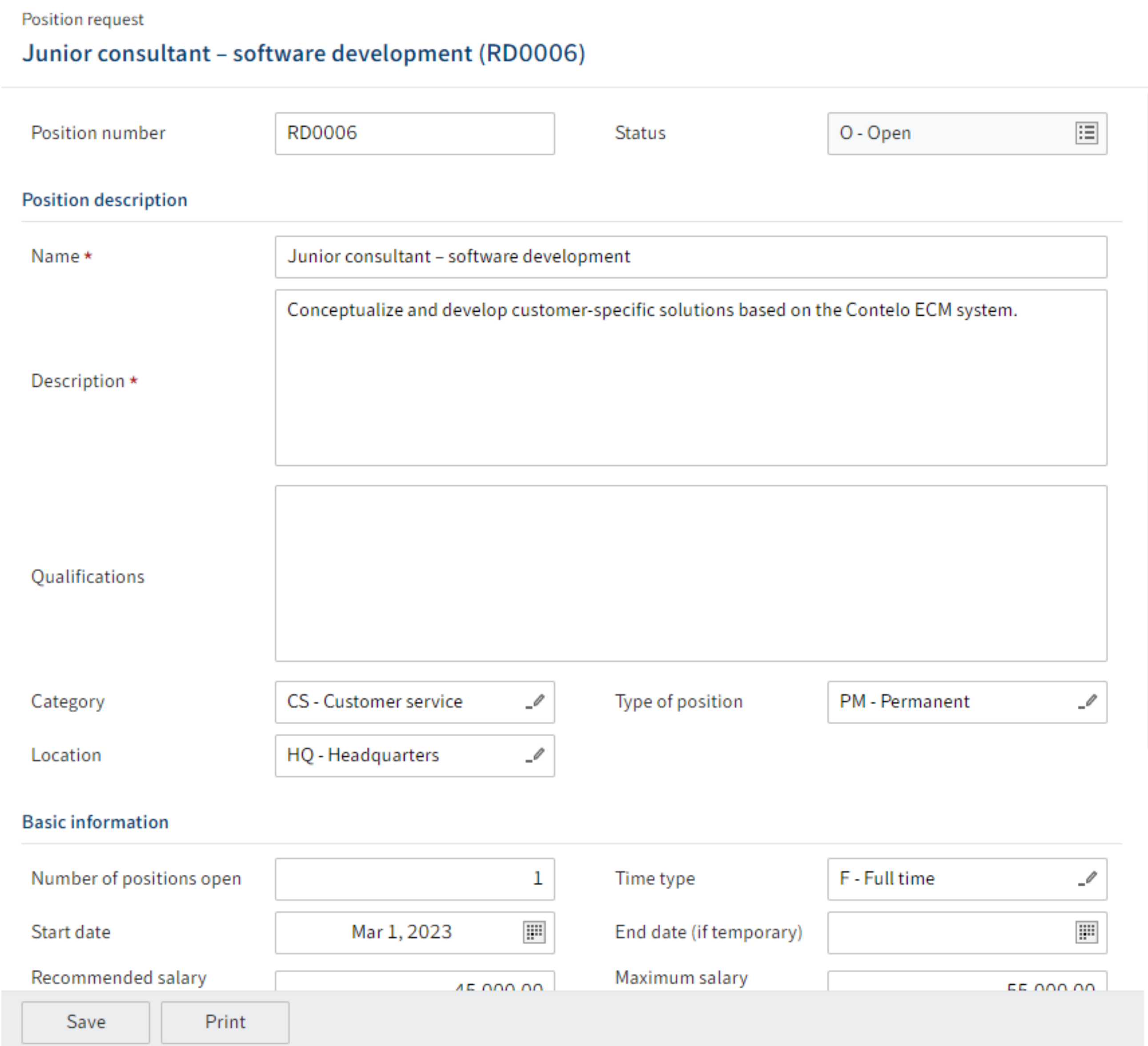

Position request
Junior consultant – software development (RD0006)
Position number: RD0006
Status: O - Open
Position description
Name *: Junior consultant – software development
Description *: Conceptualize and develop customer-specific solutions based on the Contelo ECM system.
Qualifications:
Category: CS - Customer service
Type of position: PM - Permanent
Location: HQ - Headquarters
Basic information
Number of positions open: 1
Time type: F - Full time
Start date: Mar 1, 2023
End date (if temporary):
Recommended salary
Maximum salary
Save
Print

Fig.: 'Position request' form

A position file contains the *Position request* form as well as the position posting and candidates who have applied. The *Position request* form contains an overview of the most important data related to the position.

Posting

To publish a posting, you will first have to create a position in ELO.

You can create a position as follows:

- Department heads or executive managers can submit a request via *New > Self-service > Submit personnel request*. The personnel request now has to be approved by the HR department.
- Employees from the HR department create positions via *New > Recruiting > New position*.

Once a position has been created, a posting has to be created and published for the position. If the position is no longer required, it can be closed again. The remaining candidates are sent rejections.

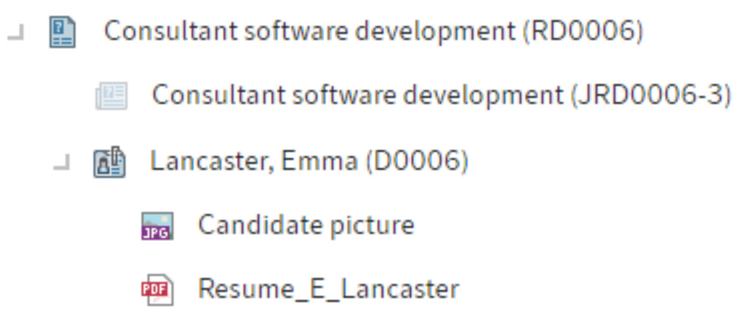


Fig.: Positions with postings and candidates

When a position is created, it is assigned a folder in ELO. The posting and all relevant candidates are filed to this folder, along with any other related documents.

Status

Every position has a status. The following statuses are available:

- D - Draft: The position has already been created, but is still being edited.
- S - Submitted: A personnel request was submitted and is currently in the approval process.
- A - Approved: The position has been approved. A posting can be created.
- X - Rejected: The position was rejected.
- O - Open: The position is open for applications. The associated posting has the status *Active*.
- C - Closed: The position was closed.

Submit personnel request

Information

As the department head, you want to submit a personnel request for your department.

Method

1. On the *New* tab, click *Self-service > Submit personnel request*.

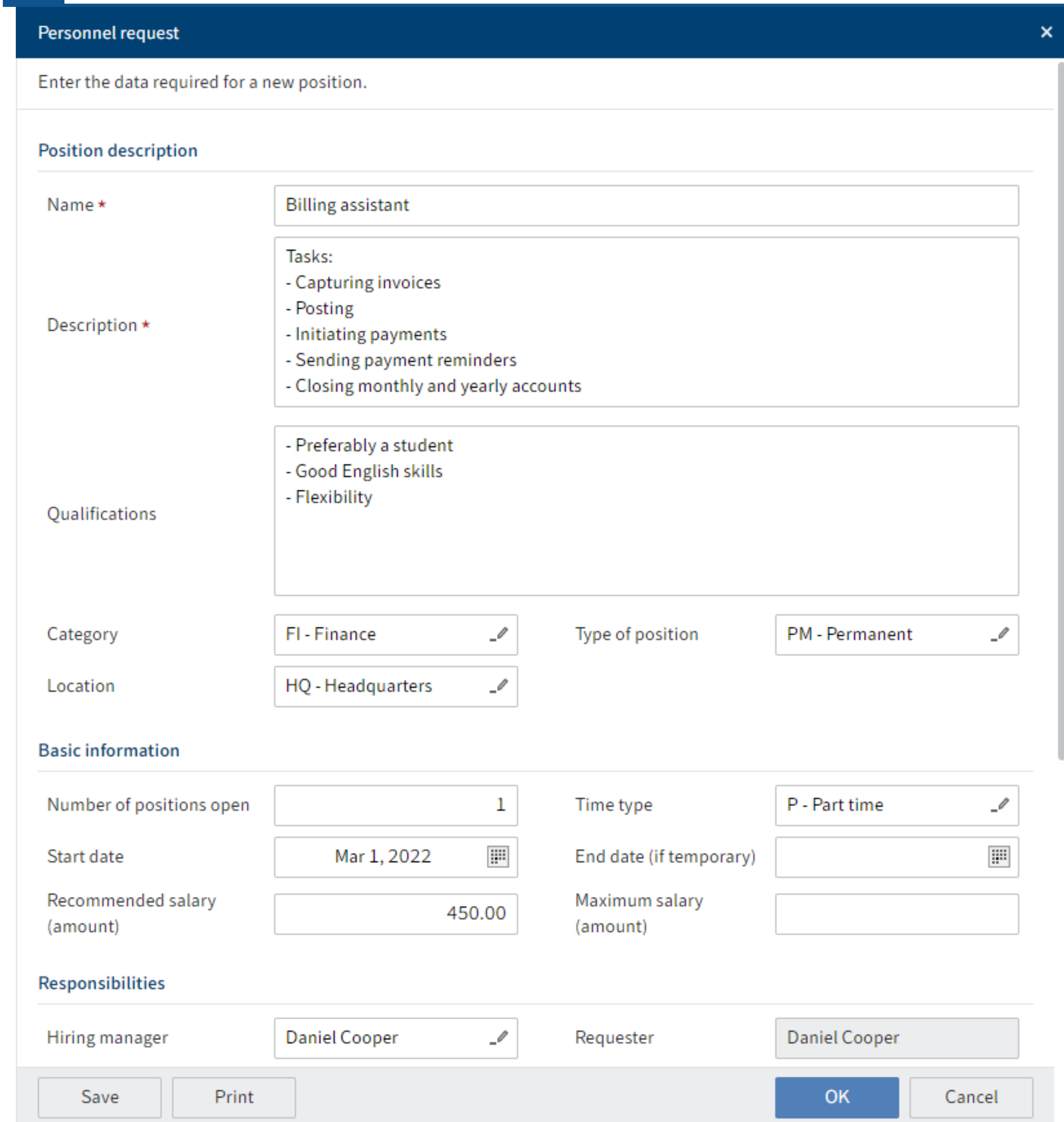


Fig.: 'Personnel request' dialog box

1. Complete the fields in the *Personnel request* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Description: Enter the requirements in brief, as the description is only intended for internal use.

1.

Click *OK*.

Result

The personnel request is sent to the HR department.

Outlook

If the HR department approves the personnel request, it can then publish a posting. You will be notified as to whether the personnel request has been approved in your *Tasks* work area.

Approve personnel request

Information

You have received a personnel request from a department head or executive manager in your *Tasks* work area. You would like to confirm the personnel request.

Method

1. Select the *Personnel request* workflow with the personnel request.

Optional: Click *Accept workflow* to process the form.

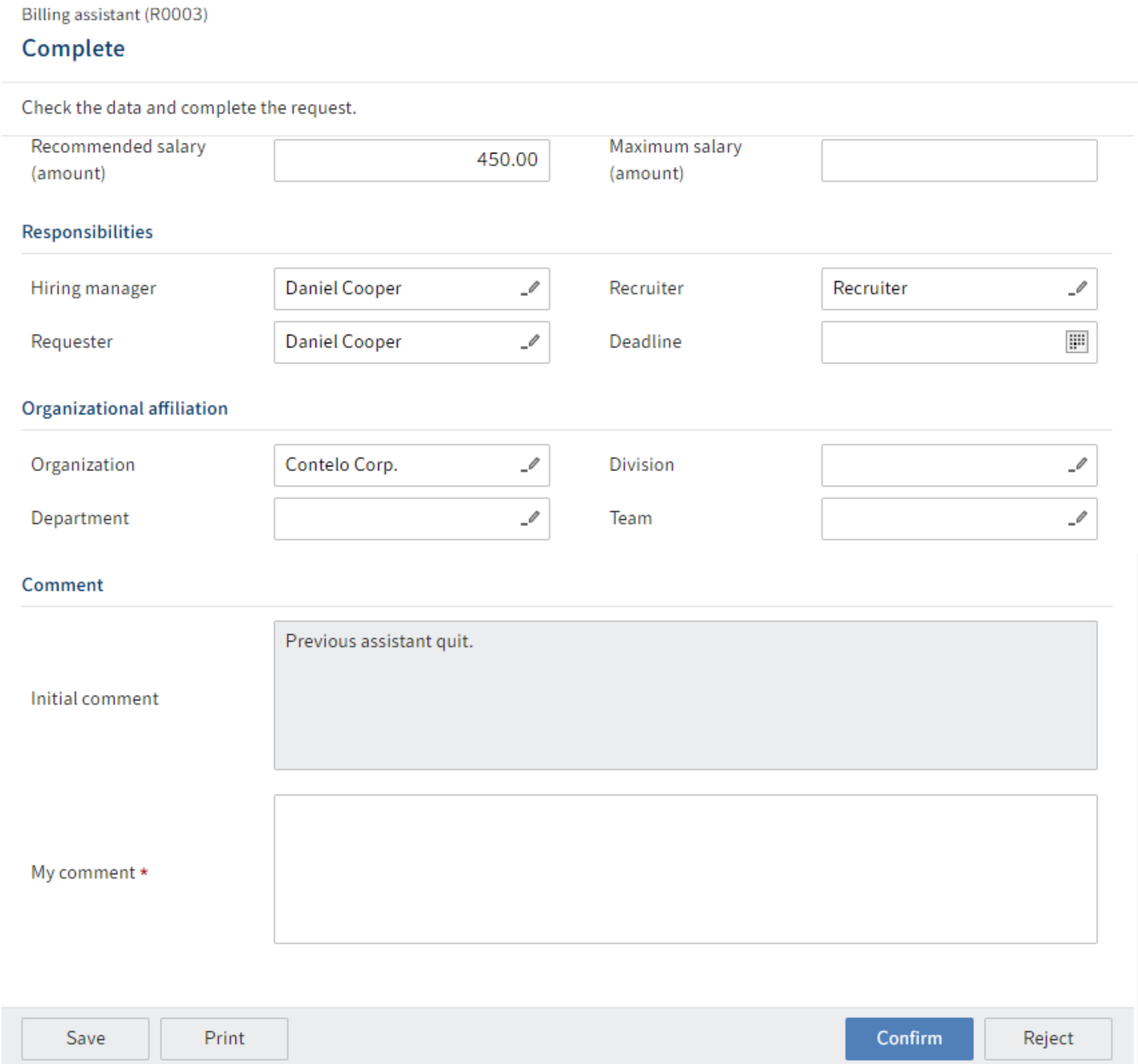


Fig.: 'Complete position request' form

1. In the *Complete position request* form, check the personnel request.
2. Enter a comment about the submitted personnel request to the *My comment* text field and click *Confirm*.

Result

The personnel request is approved. The position can be found in the repository under *// Positions by status // Approved*.

The user who submitted the personnel request receives a notification.

Outlook

You can create and publish a posting.

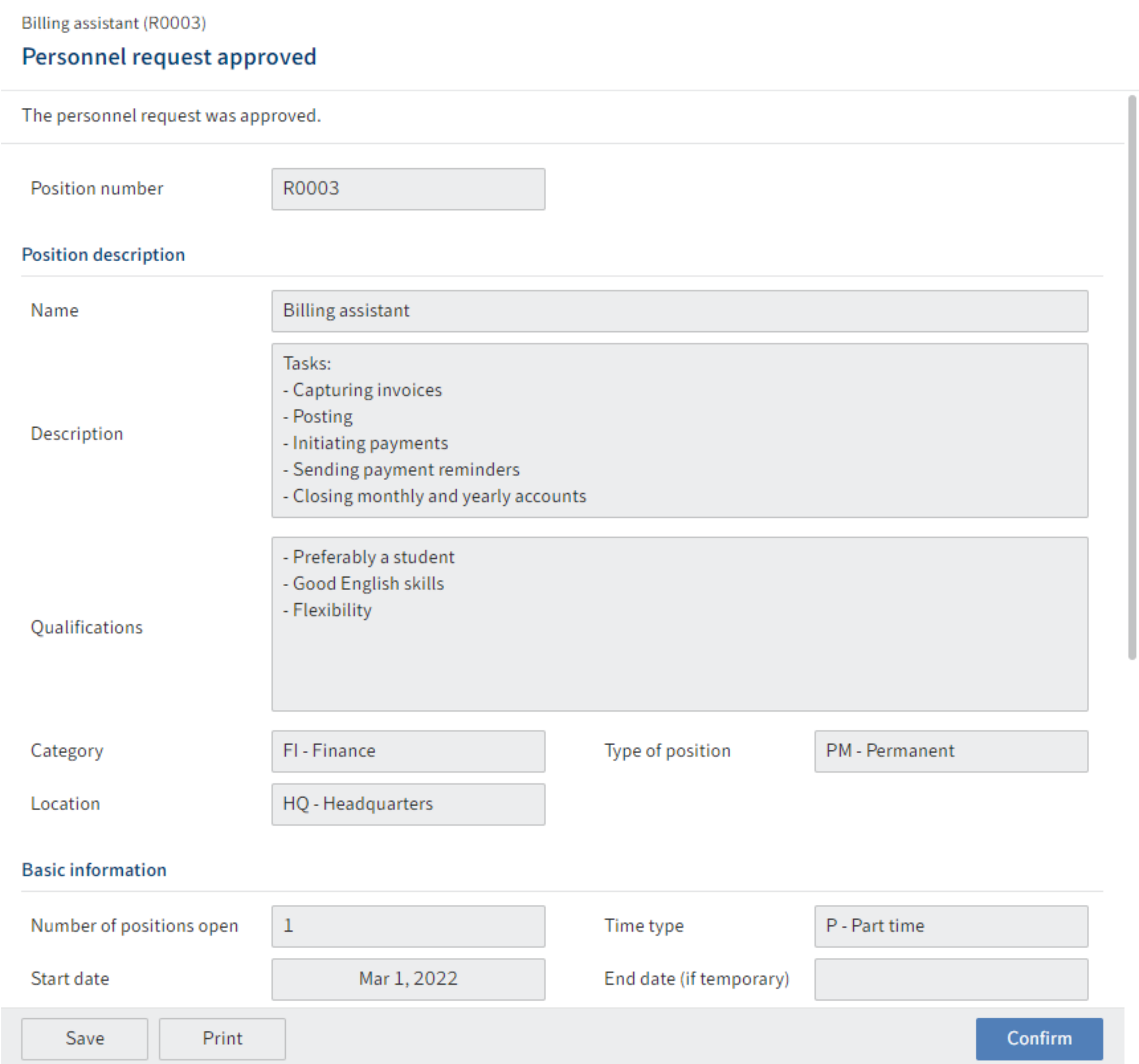
Personnel request was approved

Information

The personnel department has approved your personnel request. You will receive a notification in your *Tasks* work area for notification and to review.

Method

1. Select the *Personnel request approved* workflow.


Billing assistant (R0003)

Personnel request approved

The personnel request was approved.

Position number: R0003

Position description

Name: Billing assistant

Description:
Tasks:
- Capturing invoices
- Posting
- Initiating payments
- Sending payment reminders
- Closing monthly and yearly accounts

Qualifications:
- Preferably a student
- Good English skills
- Flexibility

Category: FI - Finance

Type of position: PM - Permanent

Location: HQ - Headquarters

Basic information

Number of positions open: 1

Time type: P - Part time

Start date: Mar 1, 2022

End date (if temporary):

Save Print Confirm

Fig.: 'Personnel request approved' form

1. In the form, click *Confirm*.

Result

You confirm that you have acknowledged the possibly revised position.

Create new position

Information

As an employee from the HR department, you want to create a new position.

Method

1. On the *Recruiting* tab, click *New position*.

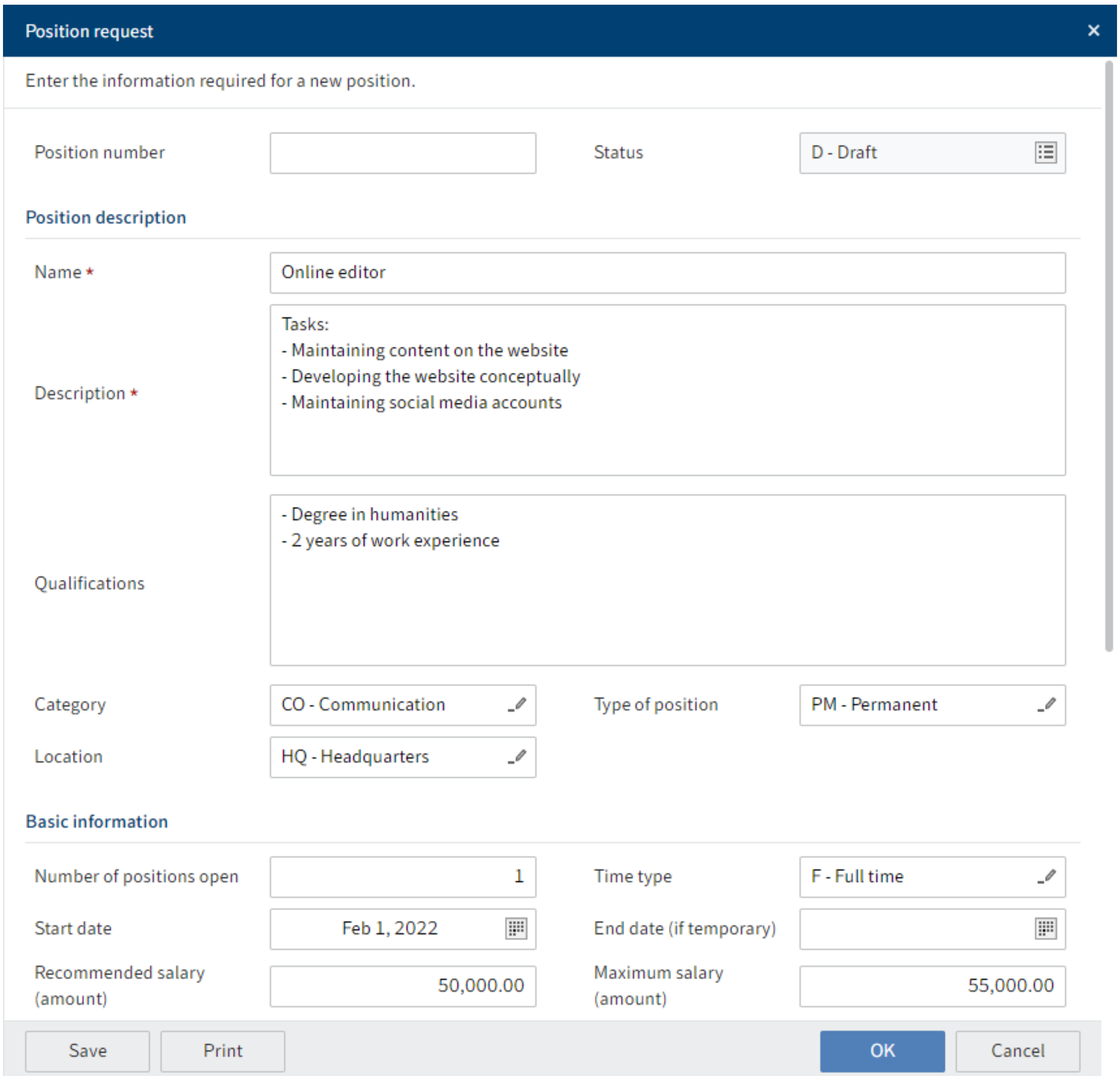


Fig.: 'Position request' dialog box

1.

Complete the fields in the *Position request* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Position number: You can enter a number based on your system. If you leave this field blank, a number is automatically generated when a position is filed to the repository.

Start approval process: If you want to initiate an approval process for the position, check this box.

1. Click *OK*.

Result

The position is created in ELO.

Outlook

To publish the position, you have to create a new posting for it.

Create new posting

Information

A personnel request was received and approved. You would like to post the position. Once you have entered information for internal use when creating the position, you now formulate the text for the posting.

To publish the position, you first have to create a posting. You can then publish the posting on a job portal.

Method

1. Select the position you want to publish.

You can also create a posting without having selected a position. When you select a position, the posting is automatically allocated correctly, and several fields are filled in automatically.

1. On the *New* tab, click *Recruiting > New posting*.

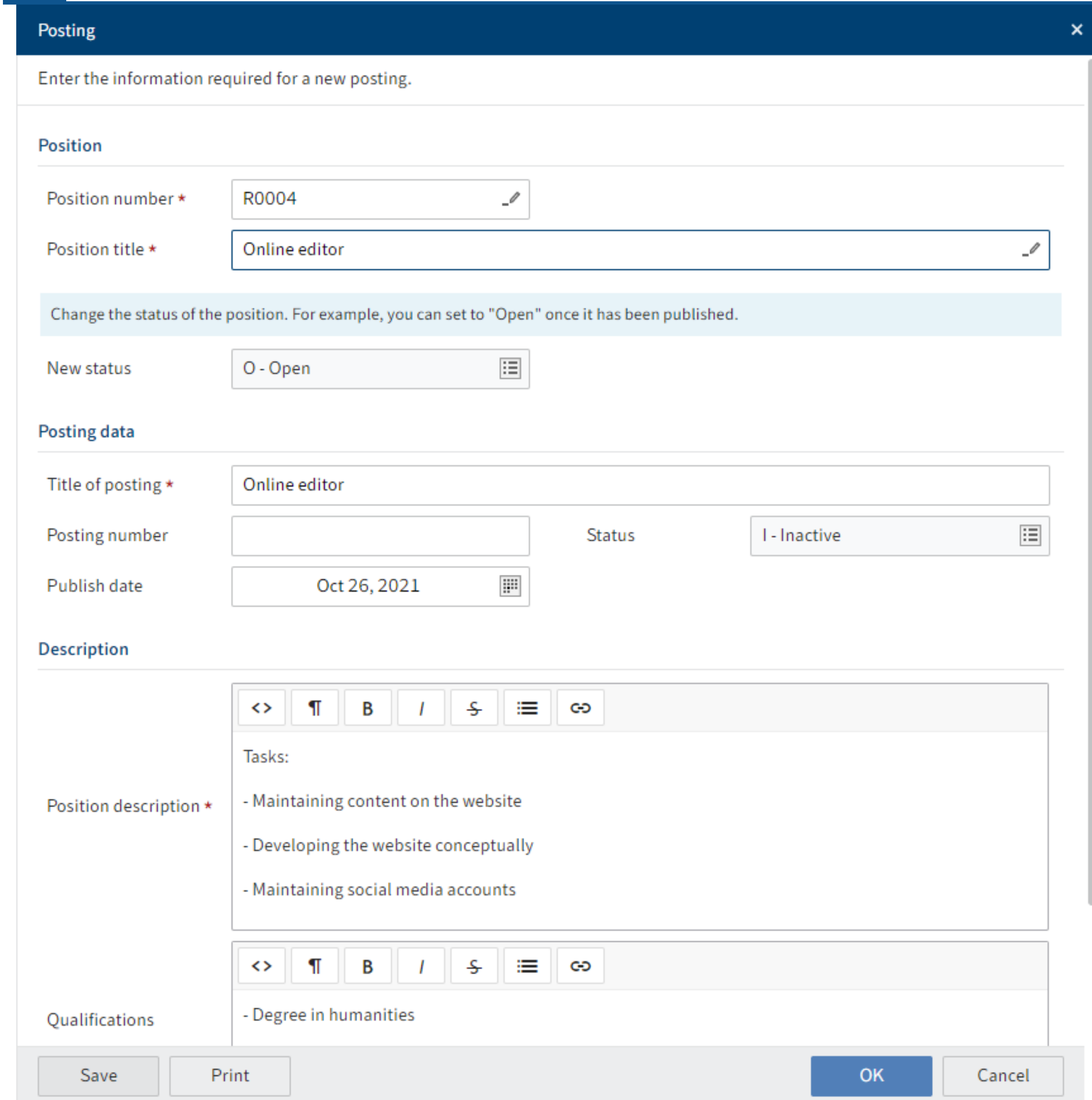


Fig.: 'Posting' dialog box

1. Complete the fields in the *Posting* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Posting number: The posting number is generated automatically as soon as you have created the posting.

Result

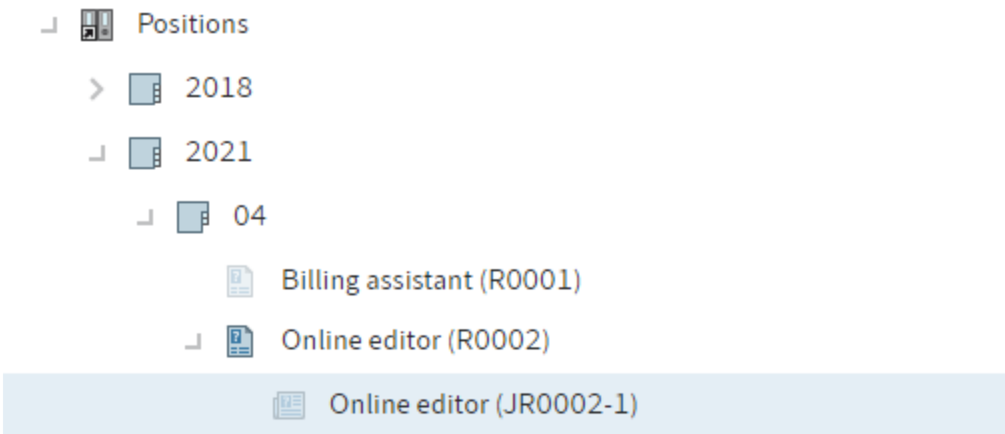


Fig.: Posting in the repository

The posting is created in the position folder. Its status is *I - Inactive*.

Outlook

With the Publish posting function, you can publish the posting on a job portal.

Publish posting

Information

You want to publish a posting to a job portal.

Requirement

You must have created the position with the Posting function.

Method

1. Select the posting you want to publish.
2. On the *Position* tab, click *Publish posting*.

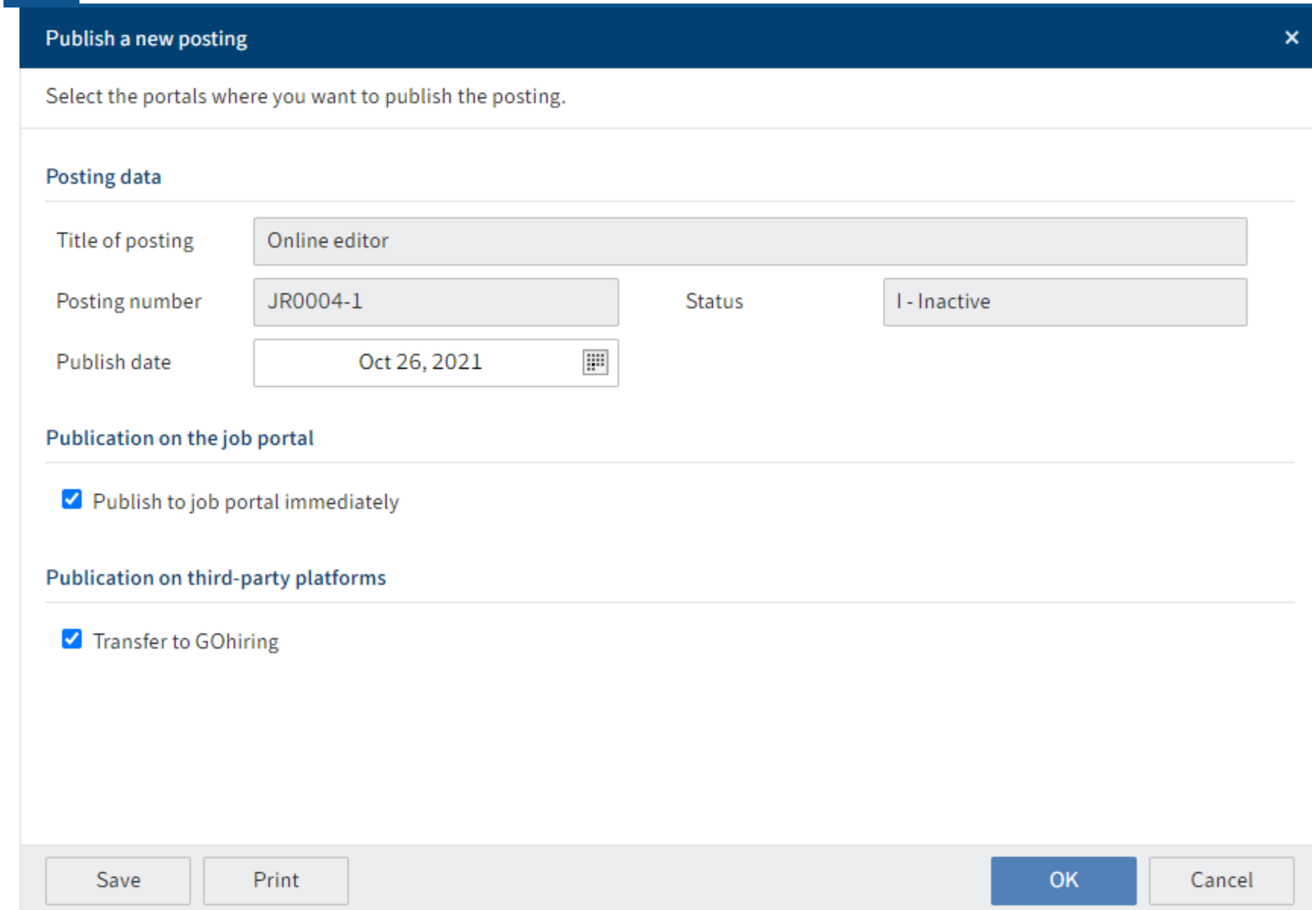


Fig.: 'Publish a new posting' dialog box

1. Complete the fields in the *Publish a new posting* dialog box as required.

The grayed out fields cannot be edited.

Publish date: You can publish the position on a certain date or effective immediately.

Transfer to GOhiring: If you select this option, a button will appear in the posting form that redirects you to GOhiring.

1. Click *OK*.

Result

The posting is published on the job portal on the desired date.

The status of the posting is *A - Active*.

Outlook

You can edit the posting on GOhiring.

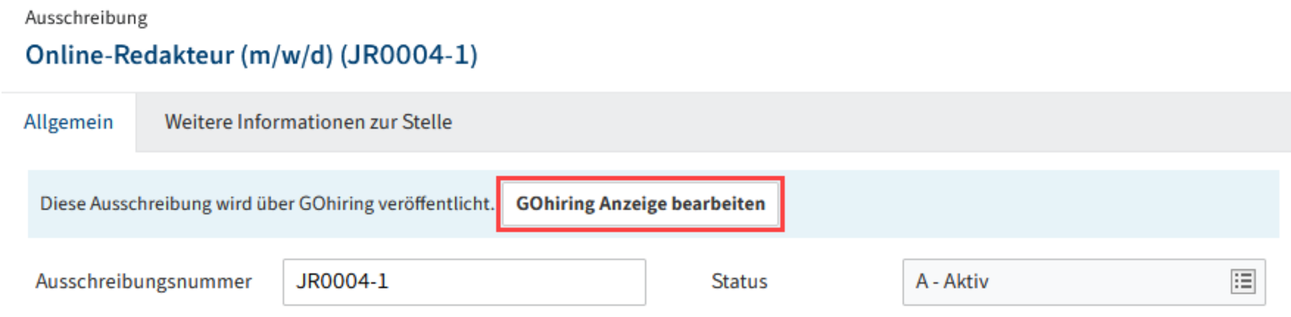


Fig.: 'Edit GOhiring posting' button

The *Edit GOhiring posting* button takes you to GOhiring where you can publish the posting.

Close position

Information

If you have filled a position or no longer want to, the position has to be closed in ELO as well. The remaining candidates automatically receive rejections and are moved to a talent pool if applicable.

Method

1. Select the position you want to close.
2. On the *Position* tab, click *Close position*.

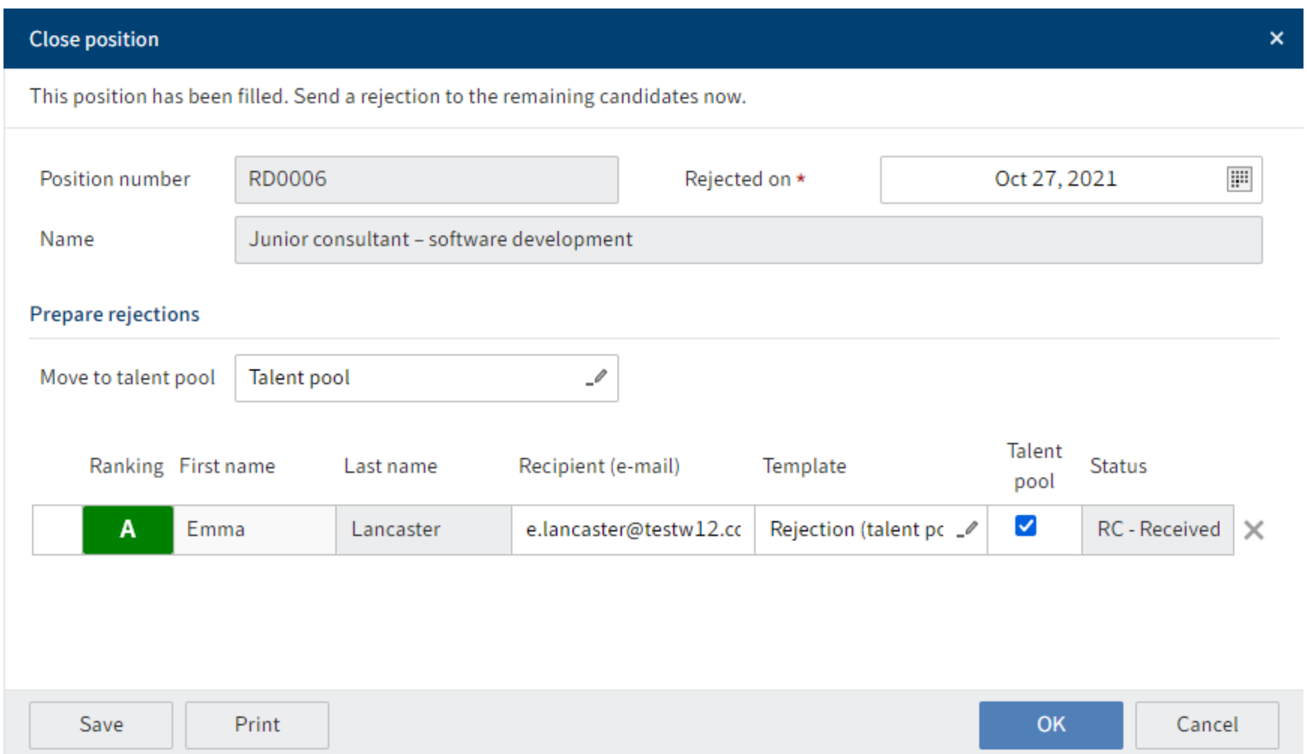


Fig.: 'Close position' dialog box

In the *Close position* dialog box, you will see an overview of the remaining candidates.

Optional: Enter the information for the individual candidates to the fields.

Talent pool: If a candidate has agreed to being added to the talent pool via the job portal, the box under *Talent pool* will be checked. If you do not want to add the candidate to your talent pool, uncheck this box.

If a candidate has not agreed to being added to the talent pool, you must not check this box.

Template: Select a suitable rejection for the respective candidate.

Result

The status of the position then changes to *Closed*. No more applications will be accepted for the position.

The candidates receive rejections by e-mail. The files of the candidates added to the talent pool are automatically moved to the talent pool.

Application process

Applications can either be received through a job portal or be created using the Create new application function.

Generally, applications are assigned to a position or a candidate pool.

Each candidate has an application phase. Using the dashboard, you can simulate real recruitment phases by moving candidates.

You can rate candidates based on selected criteria or request ratings from decision-makers to help make a decision.

If you use both ELO HR Recruiting and ELO HR Personnel File, you can create personnel files for new employees using the Hire candidate function.

Create new application

Information

You have received an application through a channel other than the job portal. You'd like to file the application.

Method

1. Select the position where you want to create the application. This can be a position or a candidate pool.

> **Information**
>
> If you do not select a position or candidate pool, a separate structure is created for the application.

1. On the *New* tab, click *Recruiting > New application*.

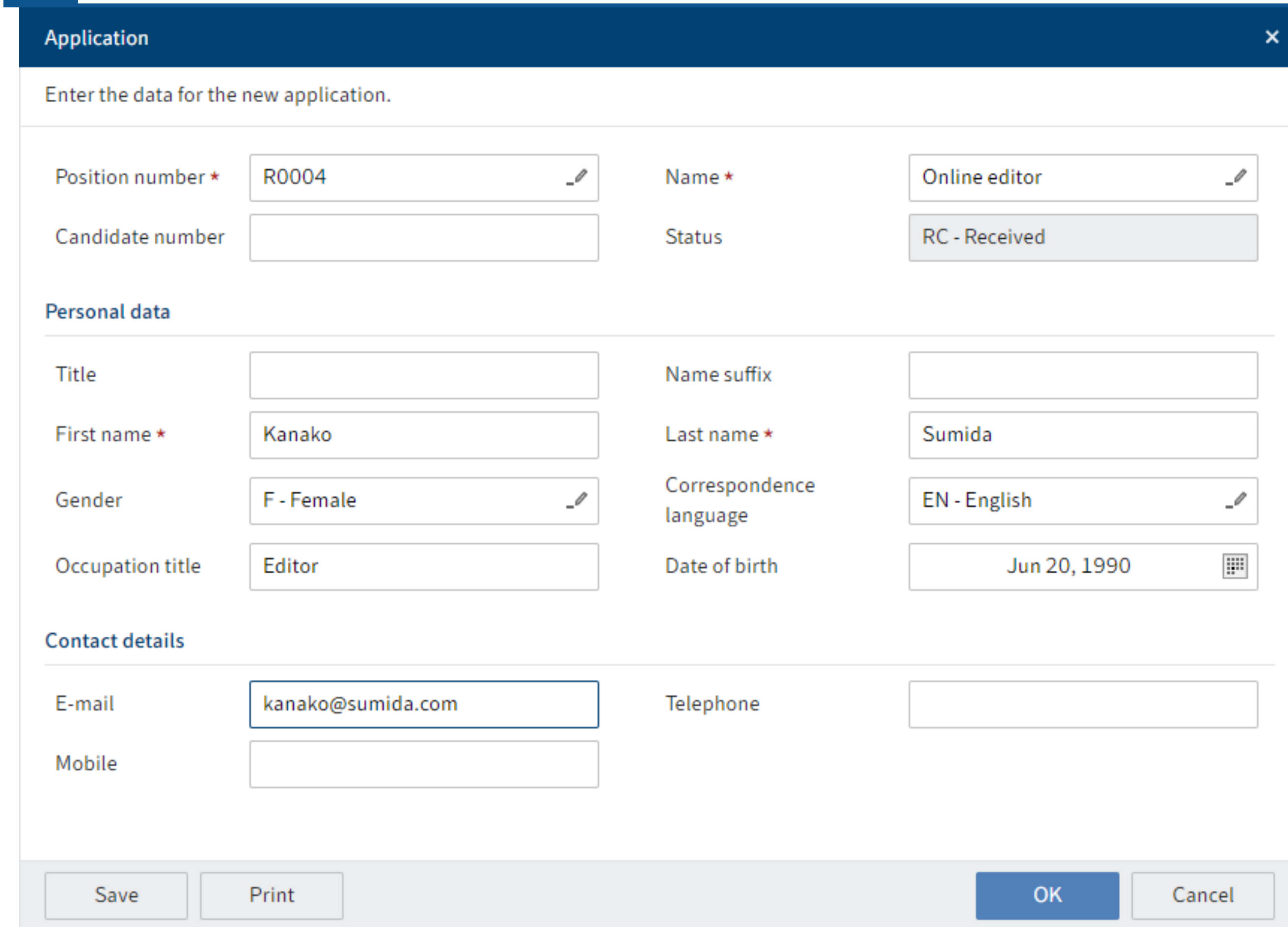


Fig.: 'Application' dialog box

1. Complete the fields in the *Application* dialog box as required.

If you have selected a position or candidate pool first, the *Position number* and *Name* fields will already be completed.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Candidate number: The candidate number is generated automatically as soon as you have created an application.

1. Click *OK*.

Result

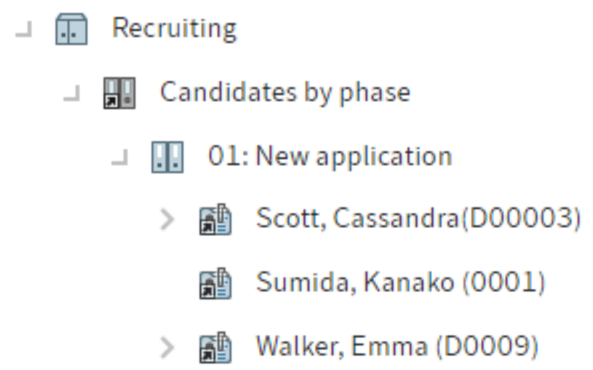


Fig.: Candidate in the 'New application' folder

The application is filed and assigned the *New application* phase.

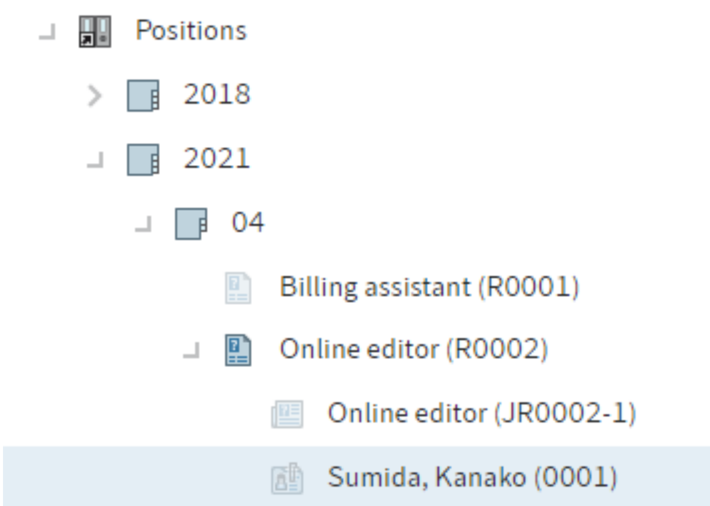


Fig.: Candidate in the folder of the selected position

If you have selected a position or a candidate pool, the application is filed to the corresponding folder. If you have not selected a position or candidate pool, a separate folder is created.

Outlook

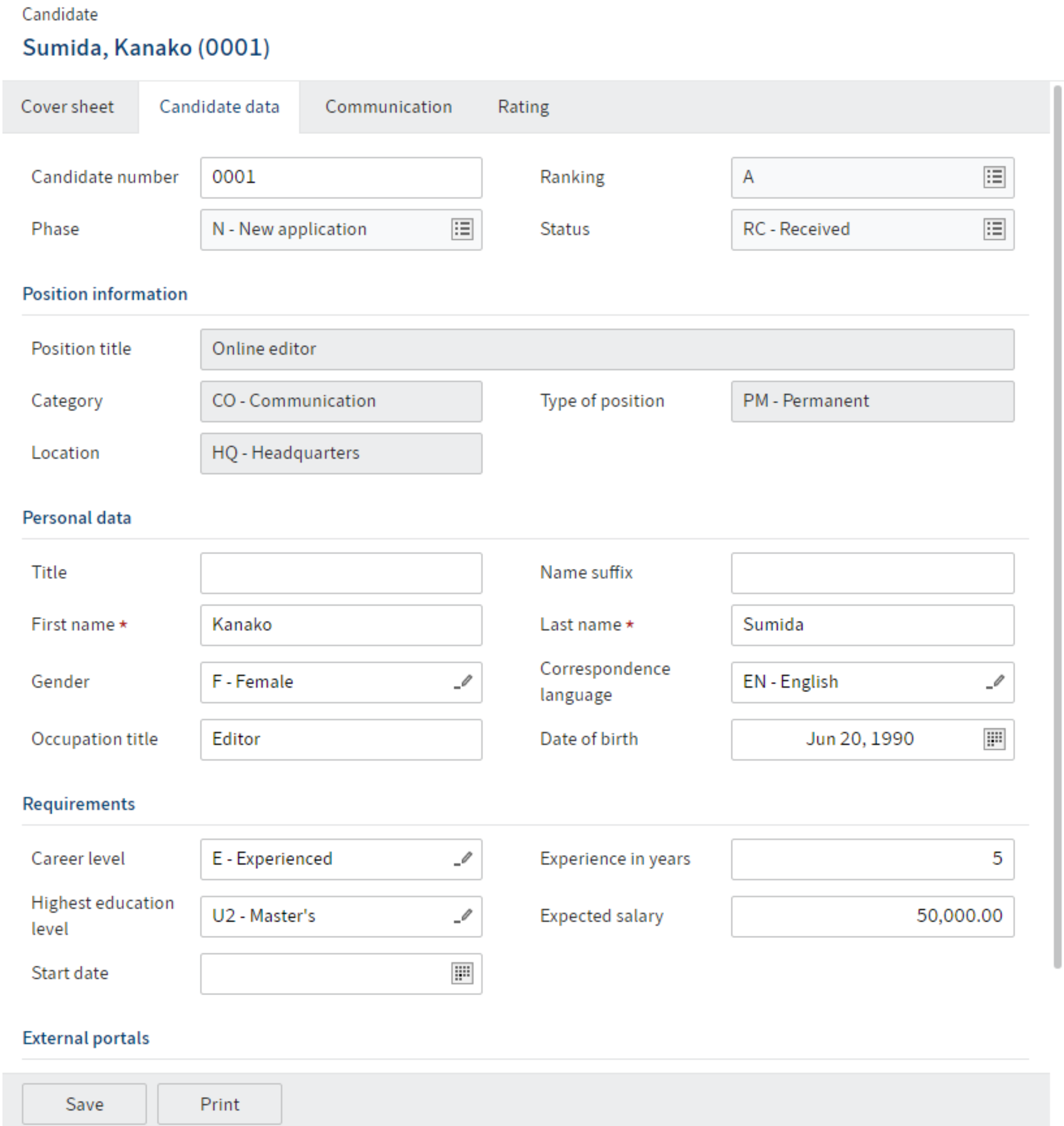


Fig.: Candidate form

You can add application documents via the form. Simply click the desired tab.

Ranking: Enter a ranking for the candidate ranging from A to C via the drop-down menu. The ranking is also shown on the candidate *Cover sheet* tab.

Add the information and confirm via *Save*.

With the *Add picture* function, you can add a picture to the candidate file.

Move candidate file

Information

You can move the candidate files to map the recruitment process. Candidate files can be moved within a position to different phases, as well as between positions and talent pools.

Method: Phases

1. On your *My ELO* home screen, click the *Candidates & positions* tile.

2. Click where you want to move the candidate files to.

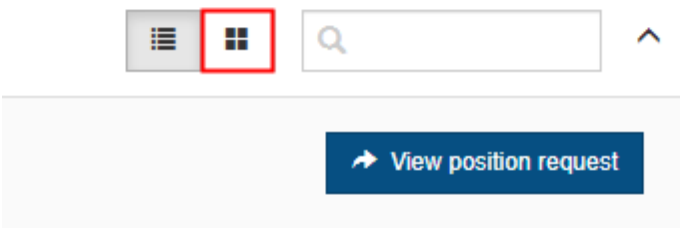


Fig.: 'Phases' button

Optional: Click *Phases* when you are in the table view.

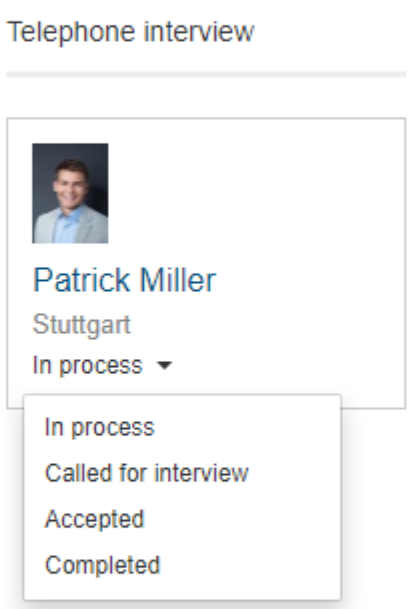


Fig.: Drop-down menu

If the status changes within a phase, use the drop-down menu.

1. Move the candidate file to the new phase via drag-and-drop.

Result: Phases

The phase of the candidate file now also changes in the repository.

Method: Position and talent pool

1. On your *My ELO* home screen, click the *Candidates & positions* tile.
2. Click anywhere in the position overview.
3. In the left bar with the position overview, click *Talent pool*.

Optional: Click *Phases* when you are in the table view.

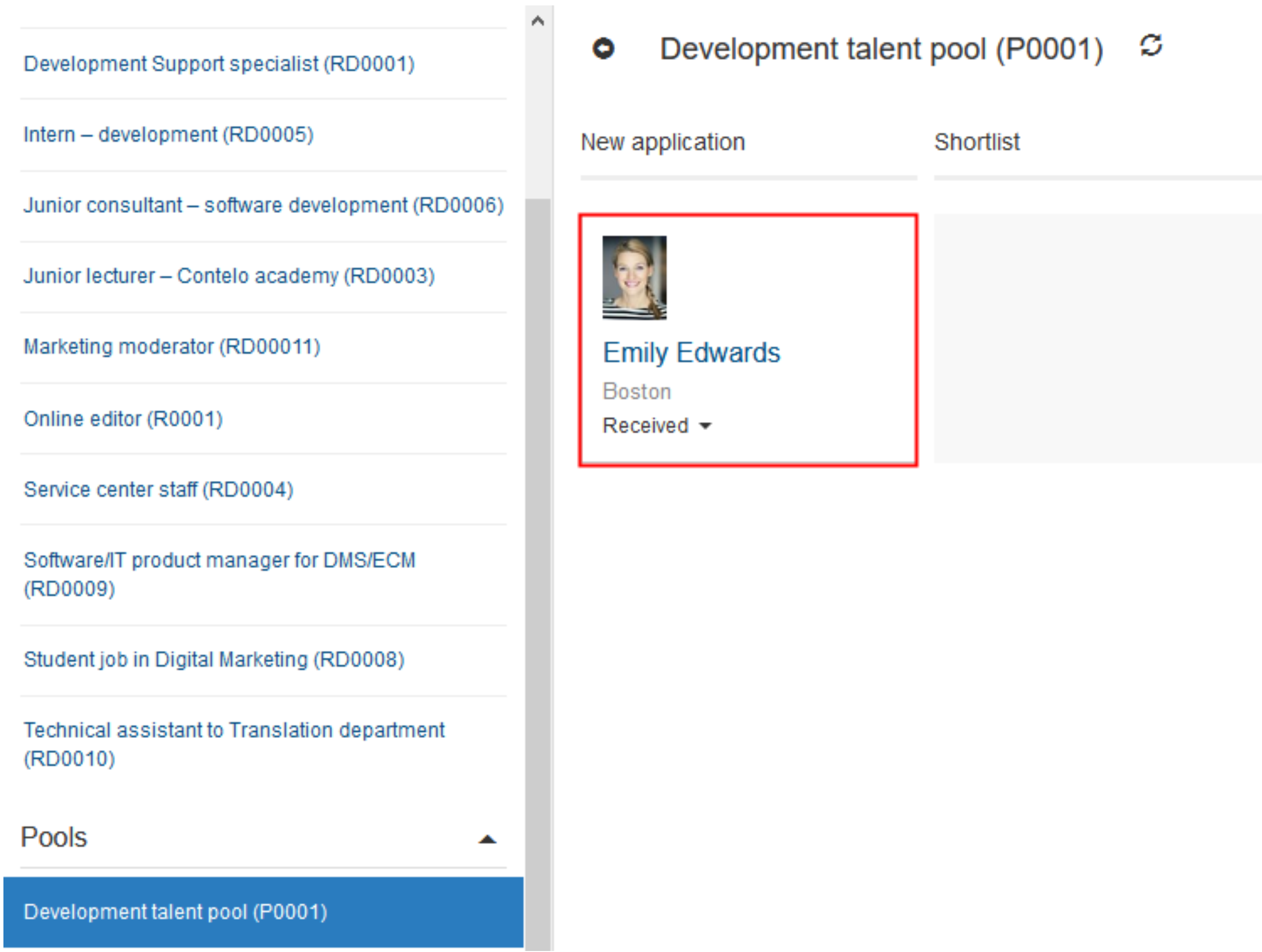


Fig.: Candidate in the talent pool

1. Click the candidate and drag-and-drop the file to the selected position.

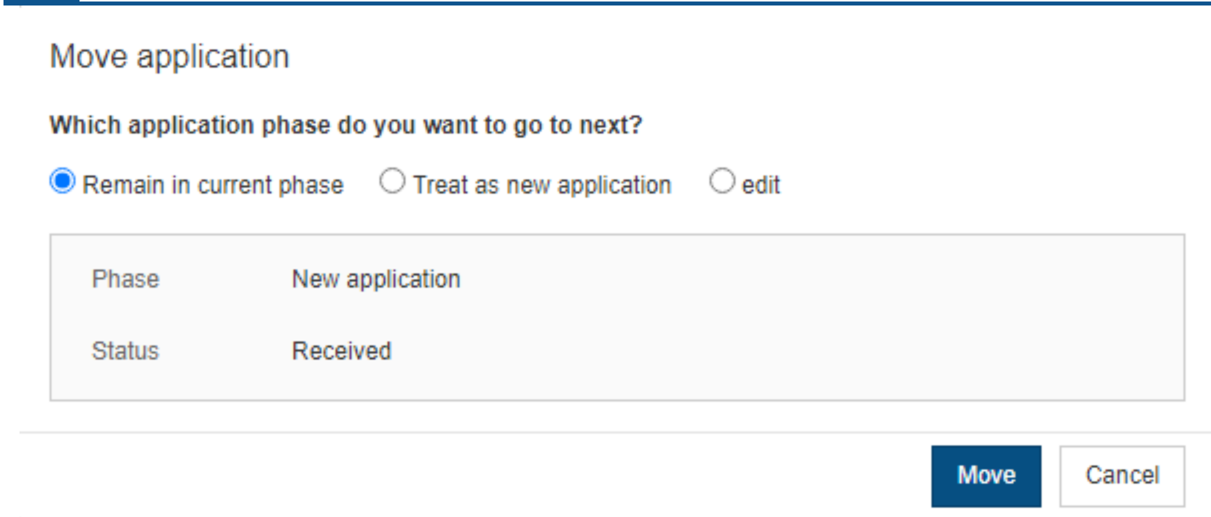


Fig.: 'Move application' dialog box

1. In the *Move application* dialog box, select a phase for the candidate after you have moved the file.

You have the following options:

- Remain in current phase: The candidate is in the same phase as before in the talent pool.
- Treat as new application: Regardless of the previous phase, the candidate is moved to the *New application* phase with the status *Moved*.
- Edit: Via the drop-down menus, you can choose the candidate's phase and status.

Result

The candidate appears in the dashboard next to the newly selected position in the selected phase.

> **Information**
>
> The candidate is also assigned to the position in the repository. This may take a few minutes.

Rate candidate

Information

You have the option to rate candidates during different phases of the recruitment process. Various categories are available.

Employees from the HR department can submit the criteria to be rated to other users involved in the recruitment process.

Method

1. Select the file of the candidate you want to request ratings for.

1.

On the *Recruiting* tab, click *Request ratings*.

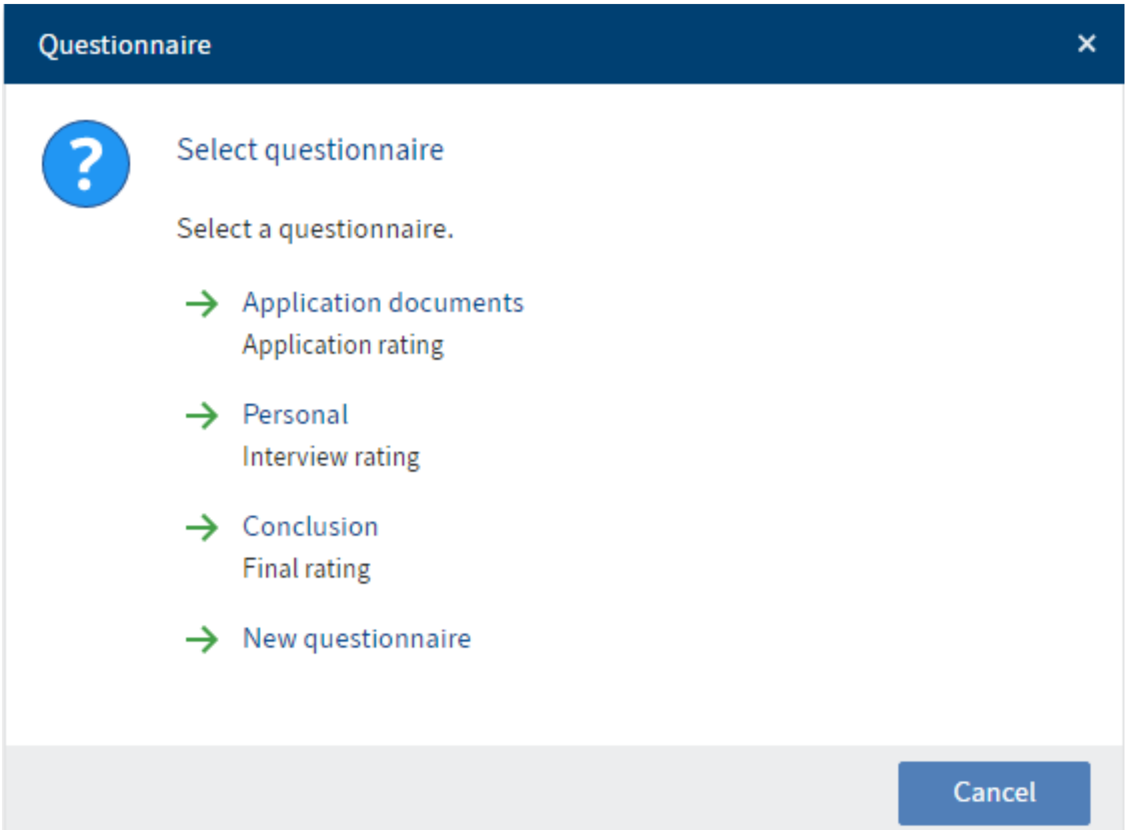


Fig.: 'Select questionnaire' dialog box

1. In the *Select questionnaire* dialog box, select the questionnaire you want to assign.

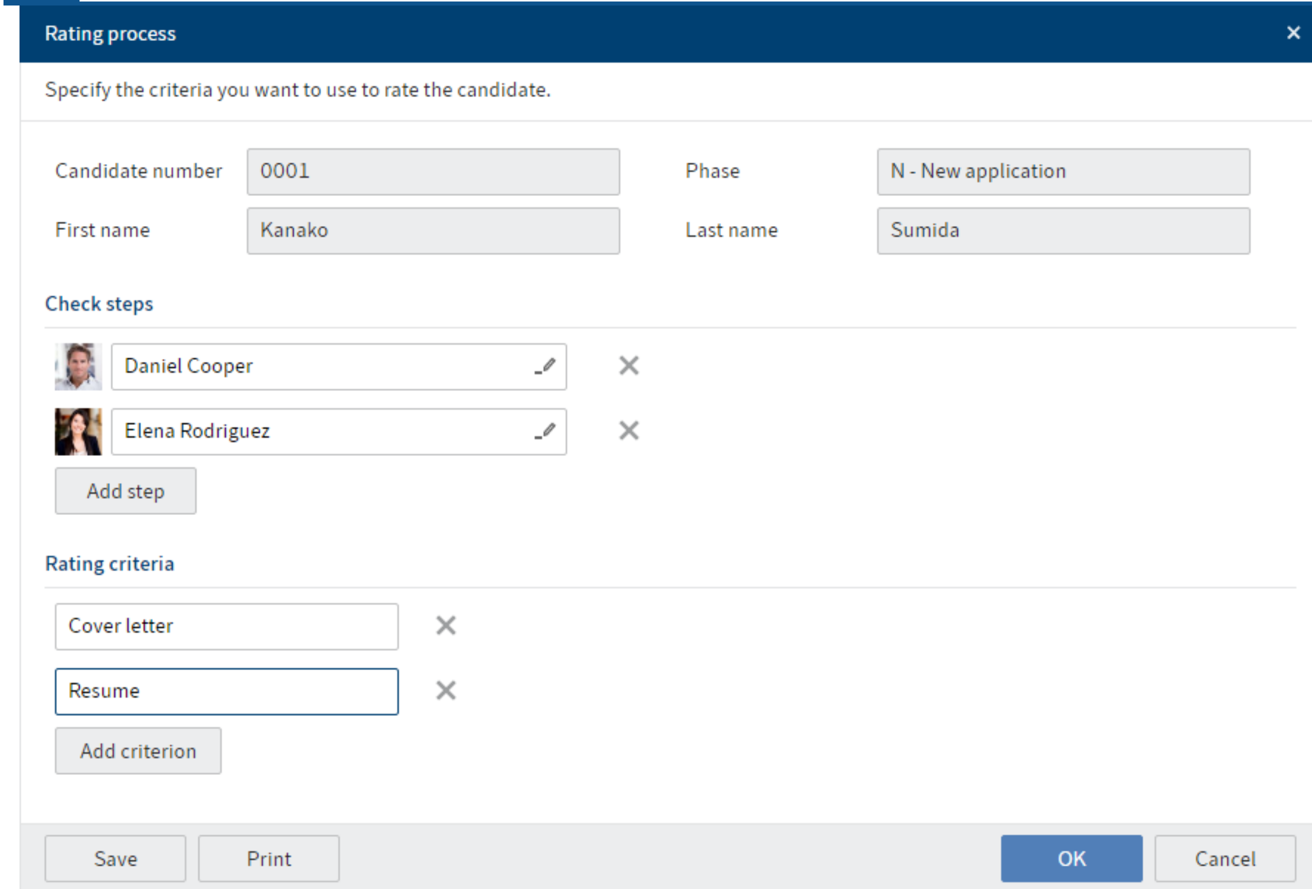


Fig.: 'Rating process' dialog box

1. In the *Rating process* dialog box, determine who should rate the candidate under *Check steps*. Clicking the *Add step* button inserts an additional input field for an additional check step.

Optional: Add another rating criterion by clicking *Add criterion*.

1. Click *OK*.

Result

The selected employees receive the *Rate candidate* workflow in their Tasks work area.

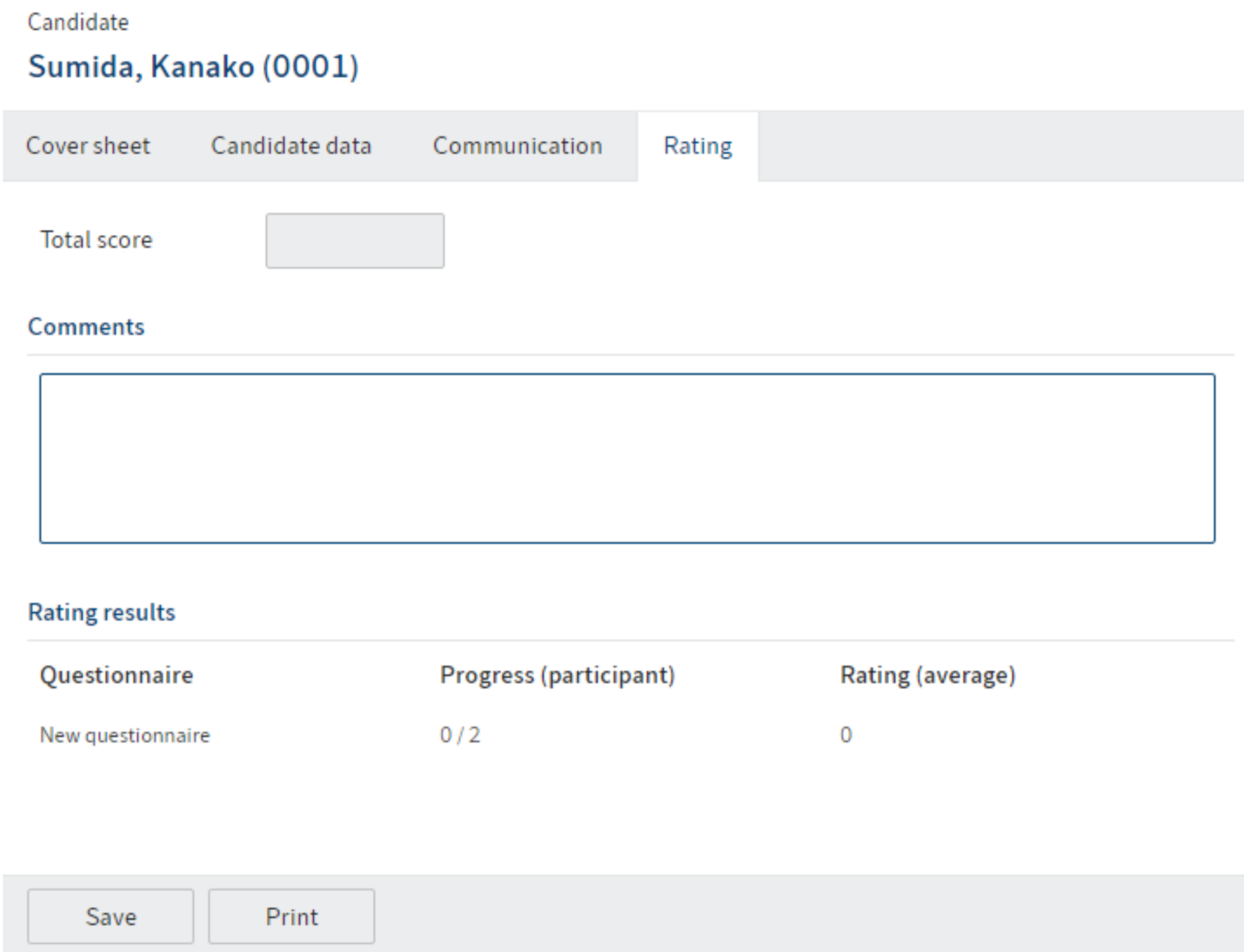


Fig.: 'Rating' tab in the candidate form

In the candidate file form, the selected questionnaire appears on the *Rating* tab.

Outlook

Under *Progress (participant)*, the first number indicates how many ratings have already been submitted. The second number indicates how many ratings have been requested in total.

You will see the average rating from the questionnaire under *Rating (average)*. The average value of all questionnaires appears in the *Overall rating* field.

Received ratings are shown in your feed.

Ranking: You can rank candidates based on these ratings. You will find the *Ranking* field on the *Candidate data* tab in the candidate file. The value you enter here (A, B, or C) is shown both on the *Cover sheet* in the candidate file and on the dashboard.

Hire candidate

Information

After the application process is complete and the candidate is hired, you want to transfer the candidate to ELO.

Requirement

This function is only available if you use ELO HR Personnel File in addition to ELO HR Recruiting.

Method

1. Select the file of the candidate you want to hire.
2. On the *Recruiting* tab, click *Hire candidate*.

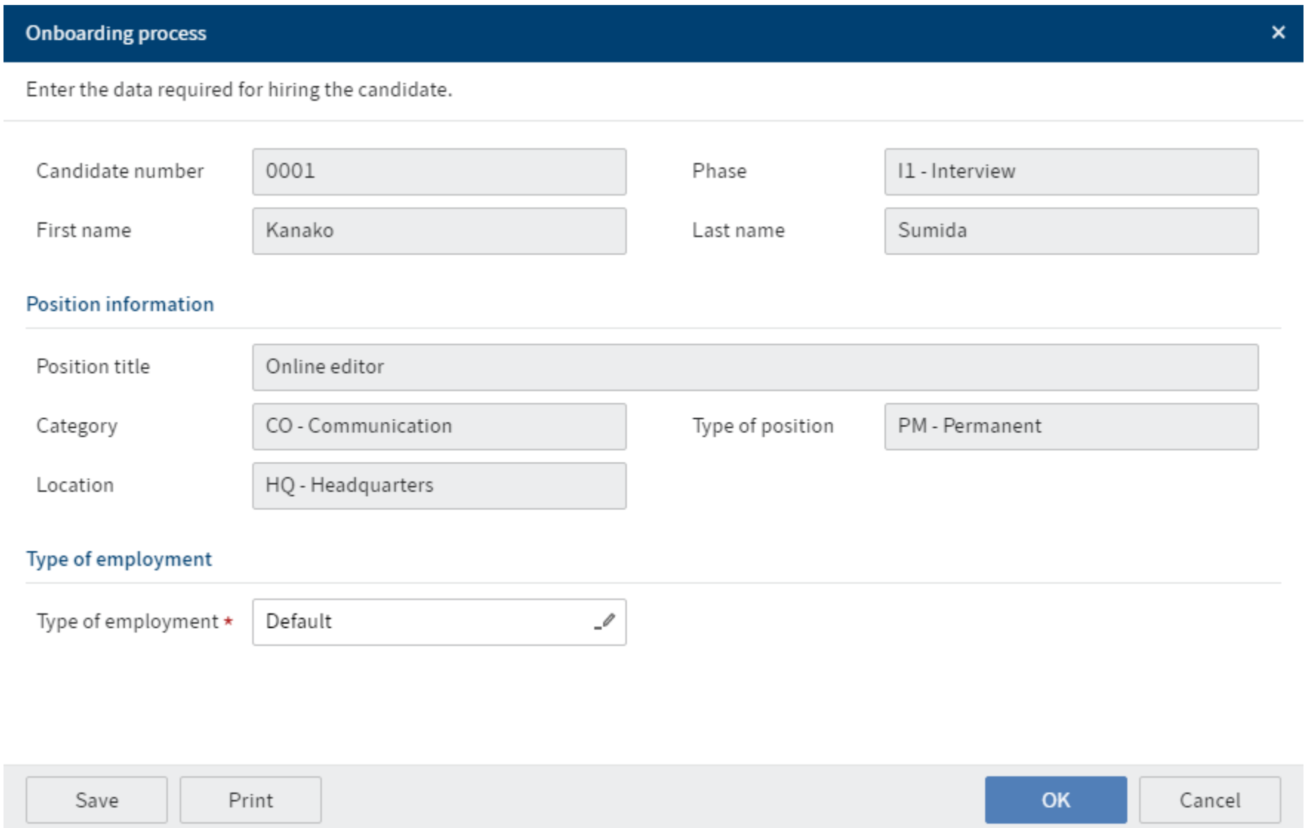


Fig.: 'Onboarding process' dialog box

1. In the *Onboarding process* dialog box, enter the type of employment.
2. Click *OK*.

Result

The candidate phase changes to *H – Hired*.

A personnel file is created in ELO HR Personnel File based on the candidate file.

Delete files of rejected candidates

Information

You want to delete the data of rejected candidates.

Method

1. On your *My ELO* home screen, click the *Candidates & positions* tile.
2. Click the position containing candidate files you want to delete.

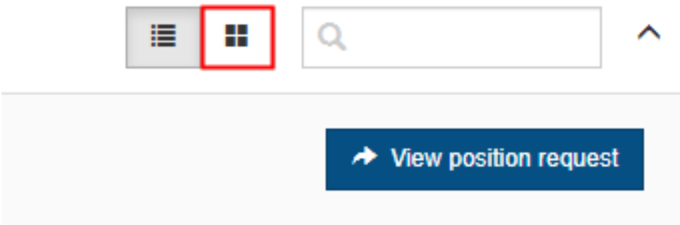


Fig.: 'Phases' button

Optional: Click *Phases* when you are in the table view.

1. Drag-and-drop the candidate files to the *Rejected* phase.

Result

After the set deletion period has passed, the candidate files are deleted automatically.

> **Information**
>
> This only assigns candidate files a deletion marker, and does not delete them permanently. Deleted entries have to be removed from ELO permanently by an administrator. They can be restored until the point at which they are permanently deleted.

Create new candidate pool

Information

You'd like to create a new pool for promising candidates.

Method

1. Select the *Pools* folder.
2. On the *New* tab, click *Recruiting > New candidate pool*.

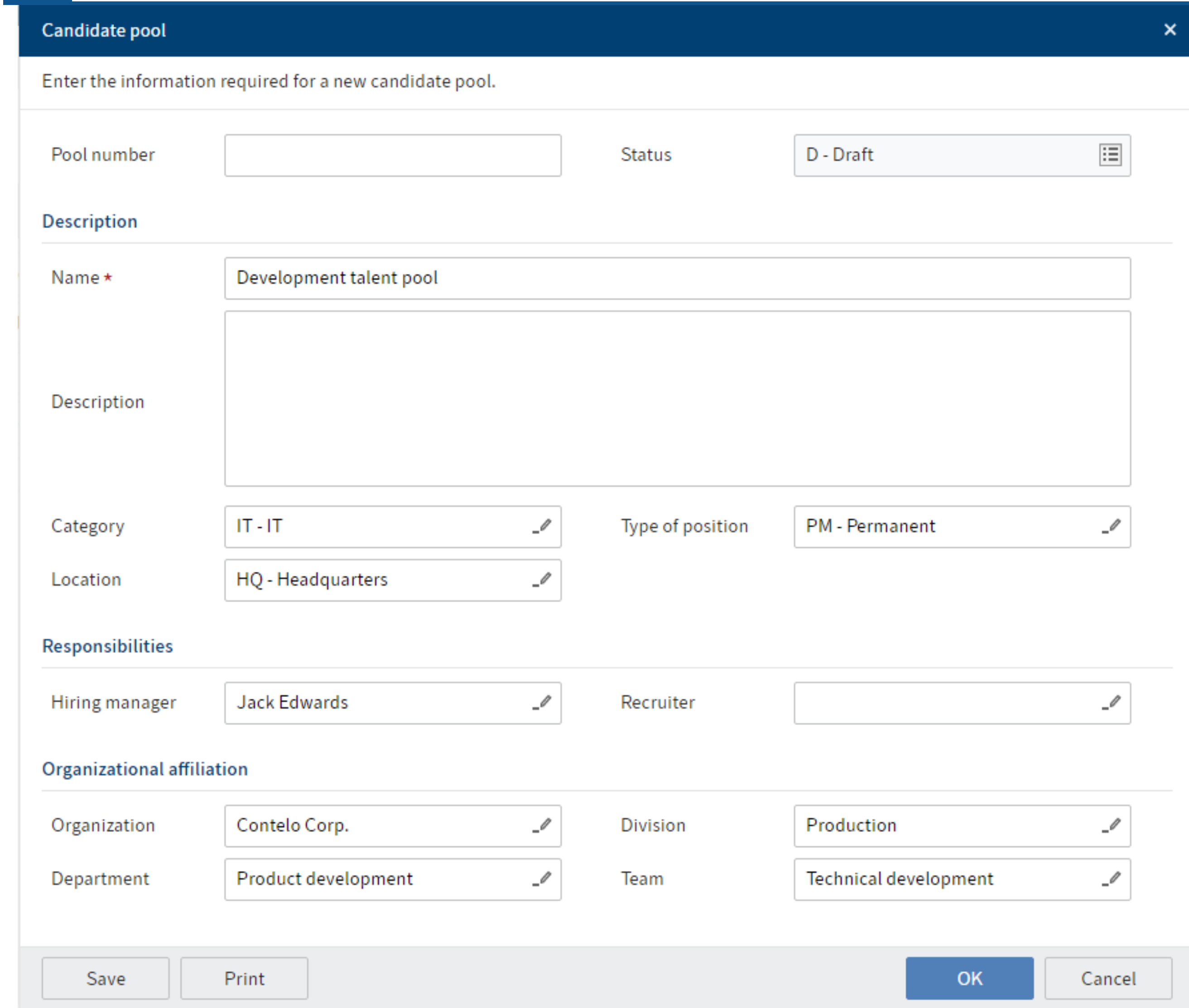


Fig.: 'Candidate pool' dialog box

1. Complete the fields in the *Candidate pool* dialog box as required.

Mandatory fields are marked with a red asterisk.

Fields with a pencil icon contain keyword lists. When you enter a value in the respective field, matching list entries appear.

Pool number: The pool number is generated automatically as soon as you have created the pool.

Status: If all information is complete and you'd like to use the pool right away, set the status of the pool to *Open*.

1. Click *OK*.

Result

The new candidate pool is created at the selected location.

Outlook

If the pool has the status Open, you can now move the candidate files to the candidate pool via drag-and-drop in the dashboard, or automatically file candidate files to the candidate pool using the *Close position* function.

Correspondence with candidates

Information

To streamline correspondence with candidates, various text templates are available for e-mails.

The following templates are available for correspondence:

- Reject candidate
- Request information
- Schedule appointment
- Send message

Correspondence can be divided further, for example different templates can be used for applicants rejected in different phases.

Method

The method is identical for all types of correspondence. In this manual, it is described taking the *Request information* function as an example.

1. Select the file of the candidate you want to request information from.

2. On the *Recruiting* tab, click *Request information*.

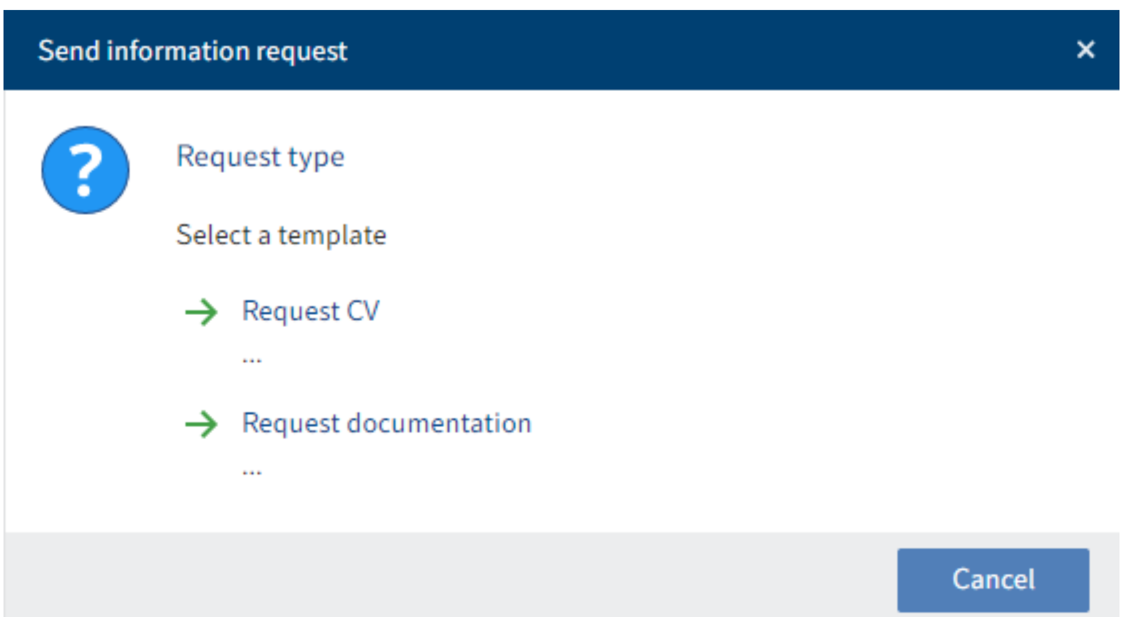


Fig.: 'Request type' dialog box

1. In the *Request type* dialog box, select the type of request you want to send.

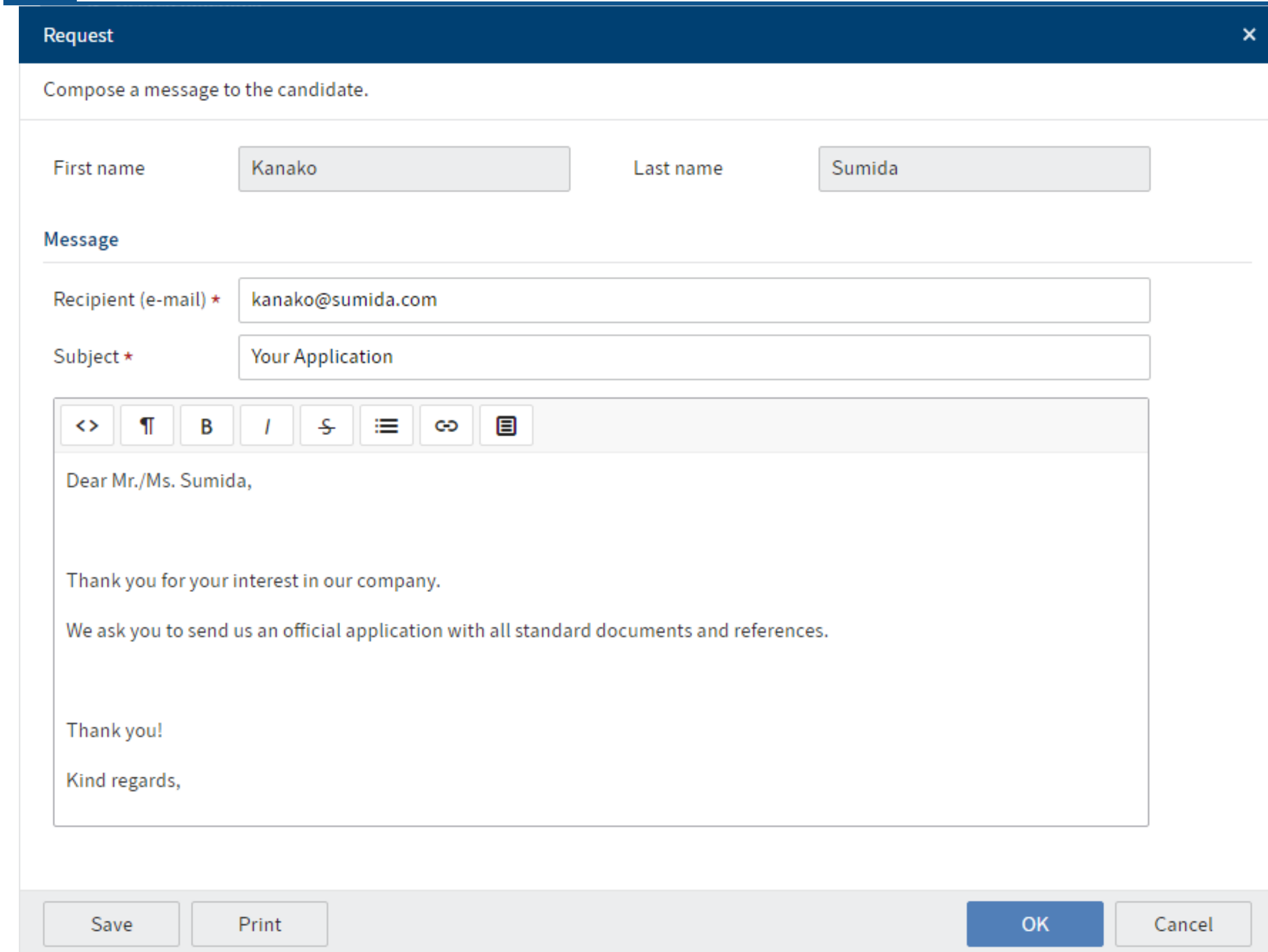


Fig.: 'Request' dialog box

The *Request* dialog box already contains a standard text. You can change and format this text as needed.

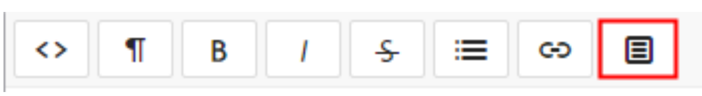


Fig.: 'Clips' button

Clips: Clips help you add to the text. They contain information on the application and can be inserted into the text. To use them, select the position in the text where you want to insert text and click *Clips*.

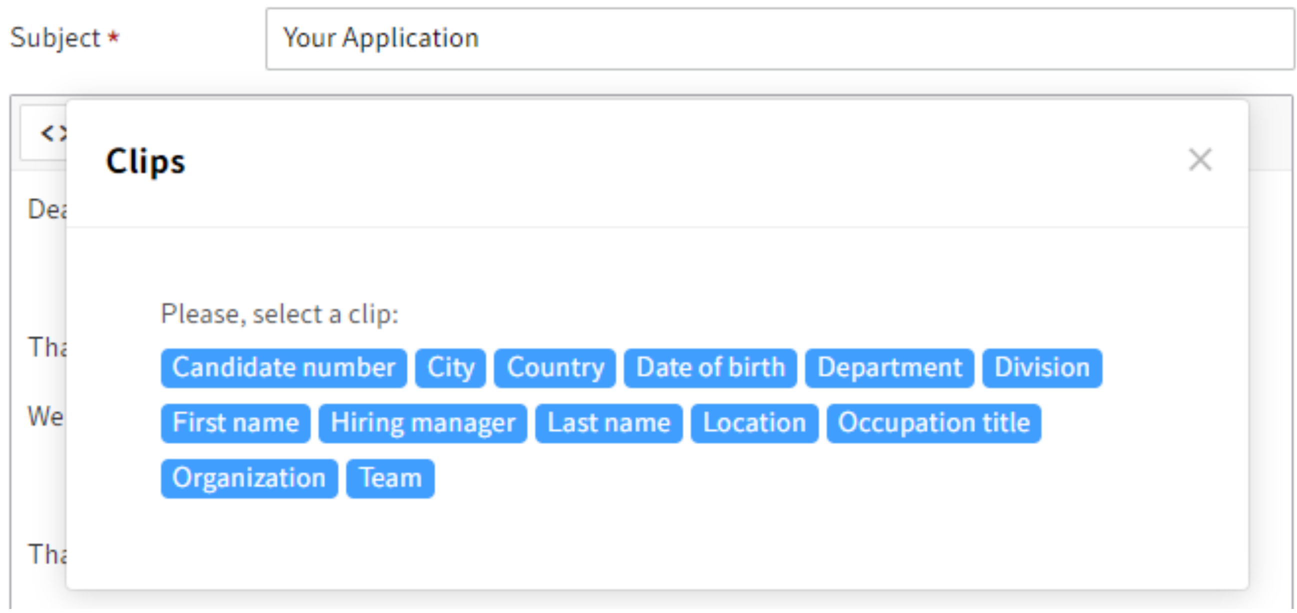


Fig.: Configured clips

When you select a clip, the corresponding information is inserted.

1. Click *OK*.

Result

The request is sent to the candidate by e-mail.

The e-mail is filed to the candidate's file.

Dashboard overview

The dashboard offers different views of available positions and candidates.

During the phase view, you can also replicate the application process for individual candidates.

You can reach the dashboard by clicking the *Candidates & positions* tile in the *My ELO* area.

The dashboard remembers your settings. When you close then open the dashboard again, it remembers and displays your most recent view.

Position view

When you open the dashboard, you will see the position view.

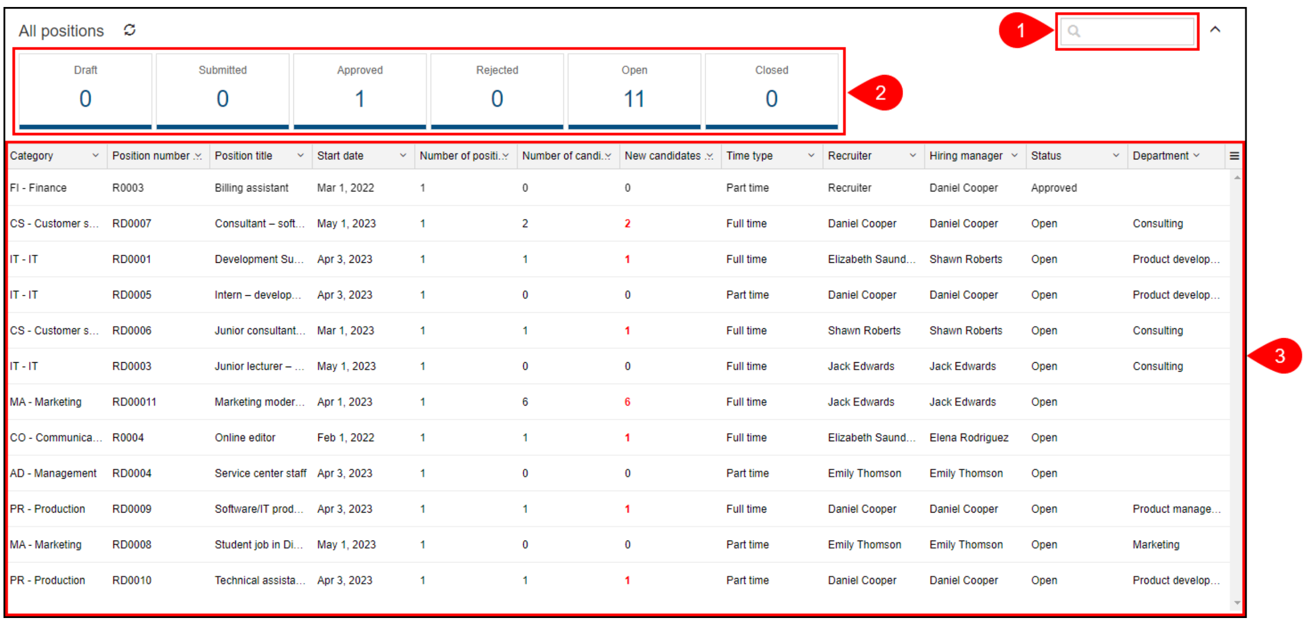


Fig.: Dashboard in the position view

The dashboard is divided into the following areas:

1 Search: In addition to text values, you can also search for number values. All data that you can select as column values in the position view serves as the basis.

2 Status: The dashboard header contains a button for each status. If a button is active, all positions with the corresponding status are shown in the dashboard viewer pane.

3 Viewer pane: In the dashboard viewer pane, you will see a list of positions. This list changes depending on the filter criteria applied.

Customize the view using the drop-down menus.

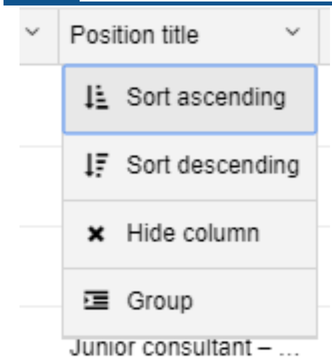


Fig.: Customize view

The drop-down menus in the column headings contain the following functions:

- Sort ascending
- Sort descending
- Remove sorting: This option appears if you have sorted the column. Click *Remove sorting* to clear the sorting option.

Alternative: You can sort the column by clicking the column heading. Clicking once sorts in ascending order. Clicking a second time sorts in descending order. Clicking a third time clears sorting.

- Hide column
- Group: The content of a column is joined into groups. The number of positions in each group is shown in brackets. Click the plus icon before the group to expand it and view all contained positions. The minus icon minimizes it again. Clicking the plus icon in the header expands all groups.

> **Information**
>
> You can combine multiple groups. You can specify a hierarchy with the order in which you select the columns.

- Ungroup: This option appears if you have grouped items. Click *Ungroup* to discard the group.

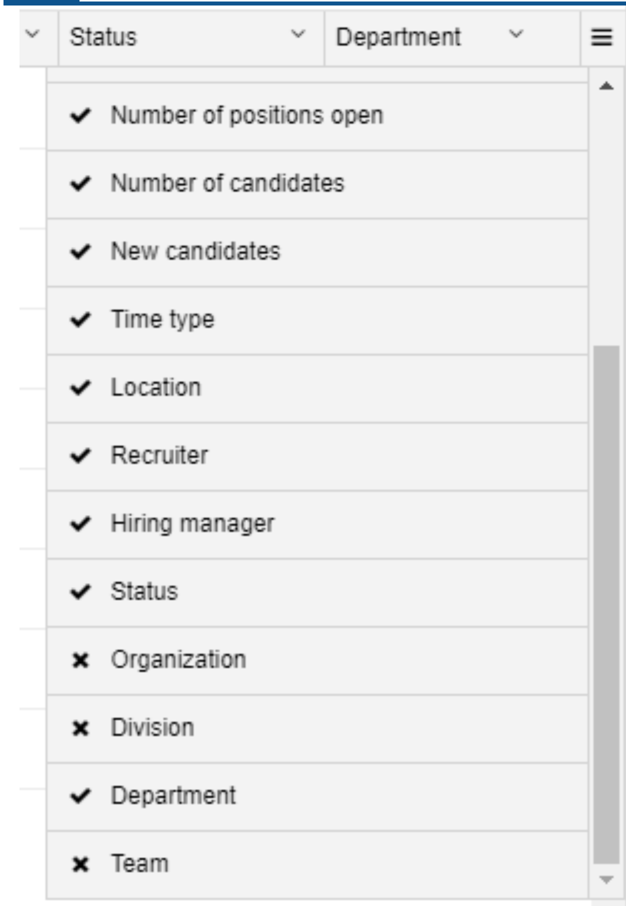


Fig.: Overview of all columns

Menu: You can show hidden columns. Click the button with three lines at the top right of the dashboard viewer pane. A drop-down menu with all available columns appears.

Candidate view

Clicking a posting brings you to the dashboard candidate view.

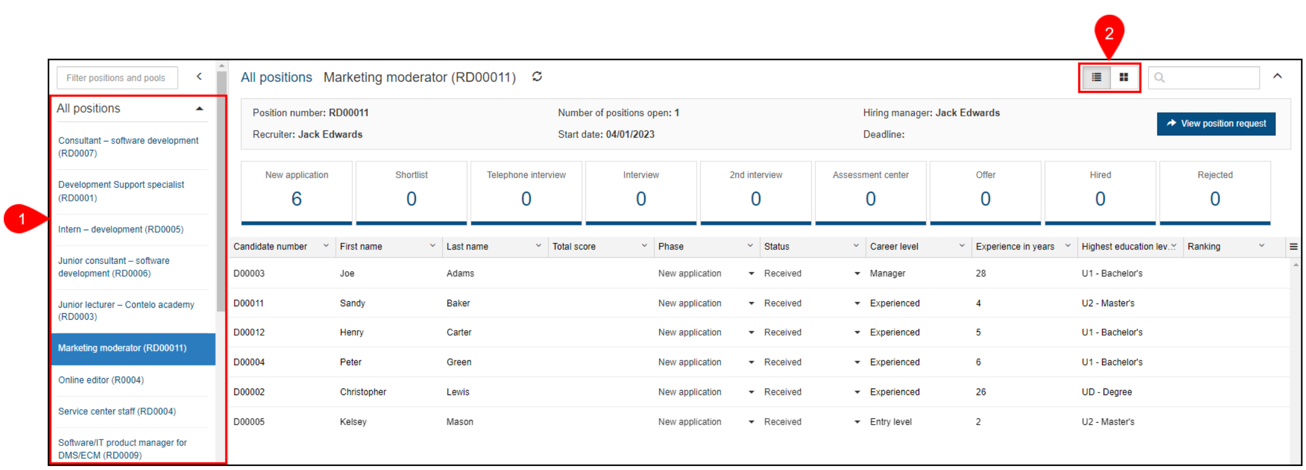
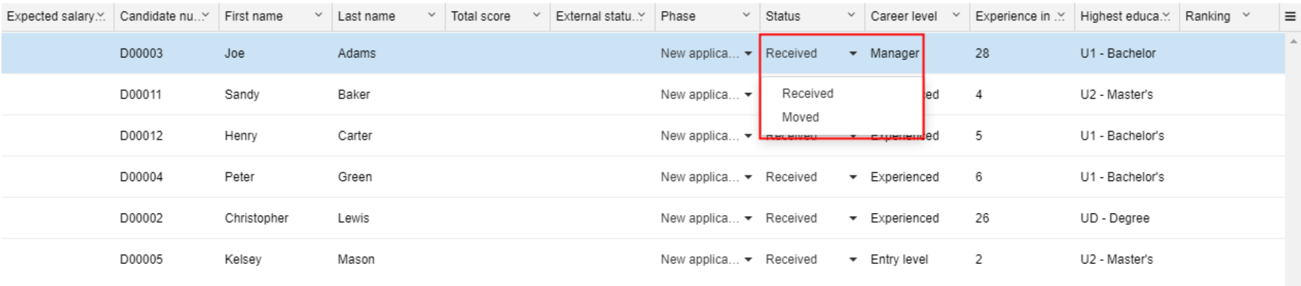


Fig.: Dashboard in the candidate view

1 All positions/Pools/Candidates: You will find a list of the available entries here. Clicking an entry opens the entry in the viewer.

2 Table/Phases: In the candidate view, you can choose between these two dashboard views.

Table



Expected salary	Candidate nu...	First name	Last name	Total score	External statu...	Phase	Status	Career level	Experience in ...	Highest educa...	Ranking
	D00003	Joe	Adams			New applica...	Received	Manager	28	U1 - Bachelor	
	D00011	Sandy	Baker			New applica...	Received Moved	...ed	4	U2 - Master's	
	D00012	Henry	Carter			New applica...		...ed	5	U1 - Bachelor's	
	D00004	Peter	Green			New applica...	Received	Experienced	6	U1 - Bachelor's	
	D00002	Christopher	Lewis			New applica...	Received	Experienced	26	UD - Degree	
	D00005	Kelsey	Mason			New applica...	Received	Entry level	2	U2 - Master's	

Fig.: Position view in table form

If you have selected a position, you will see the candidate who applied for the position here.

If you have selected a pool or an application phase, you will see all candidates in the pool or application phase.

Clicking an entry shows a preview of the entry. Double-clicking an entry brings you to the repository.

You can edit *Phase* and *Status* using drop-down menus.

Phases

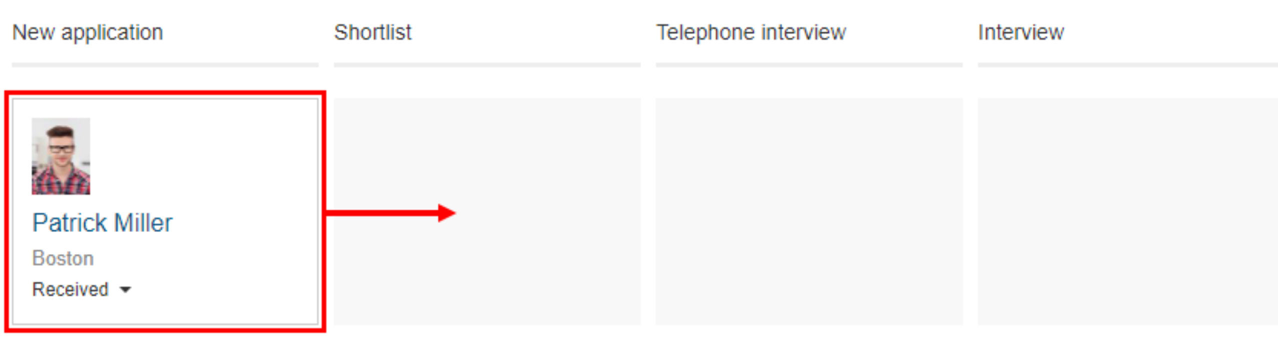


Fig.: Position view in phase form

If you have selected a position, you will see the candidate who applied for the position here.

If you have selected a pool or an application phase, you will see all candidates in the pool or application phase.

Move a candidate to another phase or another position/pool via drag-and-drop.

Each candidate file is shown in the form of a business card. Clicking the name of a candidate opens the preview for the candidate file. Double-clicking a name brings you to the selected candidate file in the repository. You can change a candidate's status via the drop-down menu. For example, in the *Interview* phase, you can change the status from *In process* to *Called for interview*.