Getting Started with

ApplicantStack® is designed for small to mid-size businesses that require affordable and easy to use solutions for their recruiting needs. We are proud that our customers can log on and get start using the product in the first sitting.

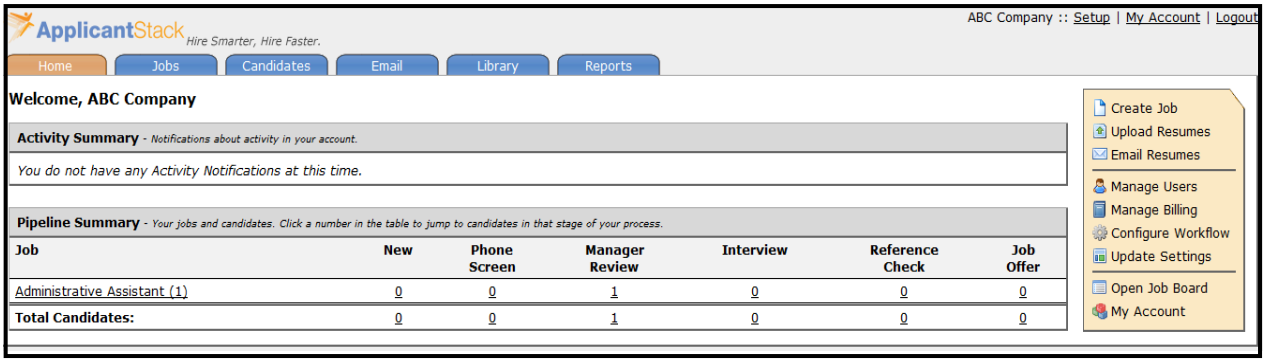
This Quick Start Guide illustrates core features and benefits of ApplicantStack and serves as a guide during your trial period. ApplicantStack is designed to provide organizations the ability to easily manage their hiring process without being complicated.

The system has a standard set of values that allows you to begin utilizing the system immediately. However, you also have the ability to setup the system in a more customized way to support your process and effectively manage both candidates and your internal users with ease (*for more information see the Setup section*).

Home

The Home Page is command central, allowing users to view Activities, navigate the system as well as perform certain tasks directly from the menu.

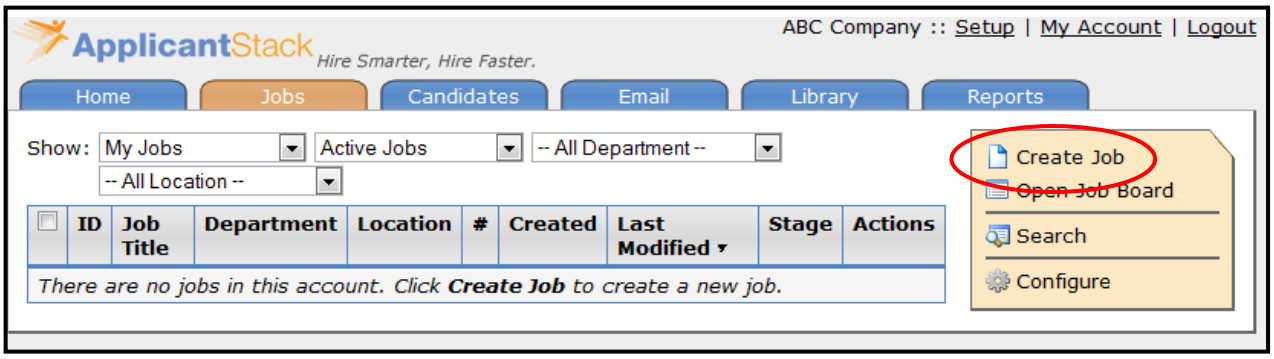
At a glance, users can see the status of the positions being filled and what activities are taking place with the Candidates. Additionally, users can create new jobs, bring in resumes, manage the Administrative functions as well as access the Job Board from one location.



Jobs

The **Jobs** module provides a straightforward way to organize positions and manage them efficiently. Selecting the Jobs tab is the first step towards posting and accepting online applications.

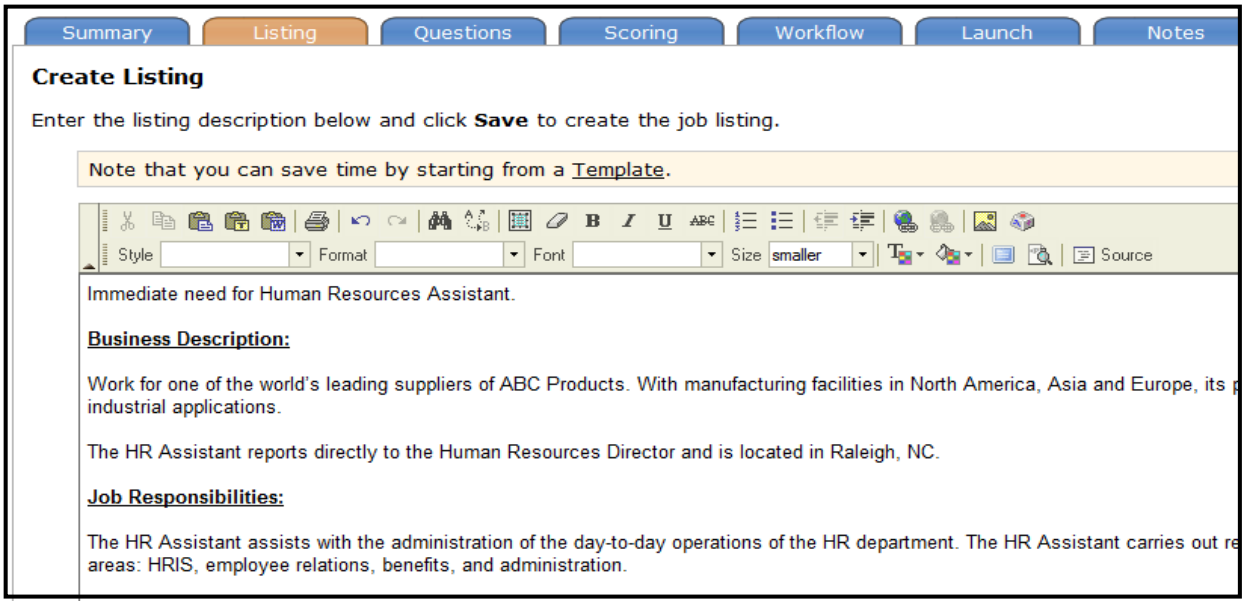
An easy to use navigation panel will get you started:



Create Job begins with determining basic information; a unique Job ID and Title, what Department and Location for the job as well as establishing User Access. All this information will eventually display in the job listing and can be used for searching and sorting.

Listing

The **Listing** allows users to utilize a Word Processing feature to create the Job description, qualifications and any other information that your organization wants to communicate about the job. **Templates** can be created if your organization has a standard format or set of job descriptions already available (*for more information see Templates under the Library section).*



Questions

ApplicantStack has a robust **Questions** module that allows users to present a specific set(s) of questions to an applicant as part of the online application process. This feature makes it possible to capture important data from the applicant and takes them through the application process. There is no limit to how many sets of questions can be associated with a job; link as many sets as is appropriate.

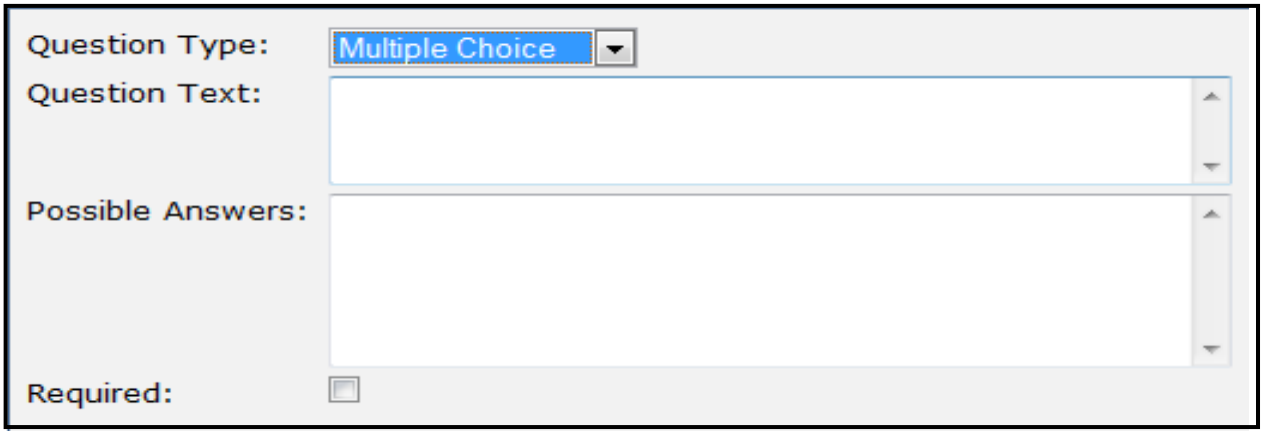
Once again, using **Templates** provides the opportunity to re-use a customary set of questions presented to applicants.

Question Type: Selecting the Question Type is important when considering how the answers may be used for reporting, sorting and scoring. The choices are:

YES/NO **Multiple Choice** **Select Many**

Single Line Text **Multi-line Text**

For each Question, users determine the **Question Text** (the exact wording of the question) and in the case of Multiple Choice and Select Many, the **Possible Answers**. You can also indicate if the question should be required.



Once a Questionnaire is complete, simply click “Apply” to associate it with the Job. The Questions can then be managed from the edit page functionality where you are able to create duplicates, edit existing and re-order the questions.

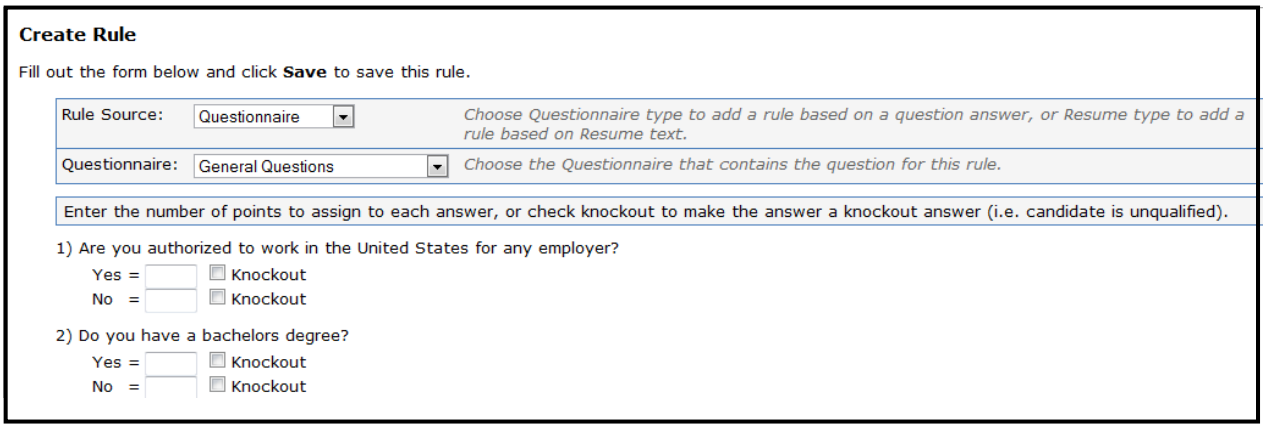
Preview provides an exact view of how the questions will be presented to the applicant during the online application process. **Advanced Settings** does provide the ability to create a Layout Template for a Questionnaire to customize the way the questions are displayed. Creating a Layout Template is an advanced task that requires knowledge of HTML. If you do not have this expertise, it can also be completed as a custom project.

Scoring

The **Scoring** module is a valuable tool which uses candidate answers and words/phrases in their resume to identify key factors. Being able to score candidates based on these data elements allows you to quickly and easily sport those that are unqualified and classify the candidate pool in a way that is meaningful. This is especially useful for managing a large volume of applications and offers an effective way to put focus on the most viable candidates.

To **Create a Rule** you first determine the Rule Source. The Rule Source can either be the answer to a Question or a word/phrase in a candidate's resume. Users can assign points to a certain answer, or decide that an answer shows a candidate is unqualified.

In the example below, the rule source is **Questionnaire**, and is based on a question posed in the online application:



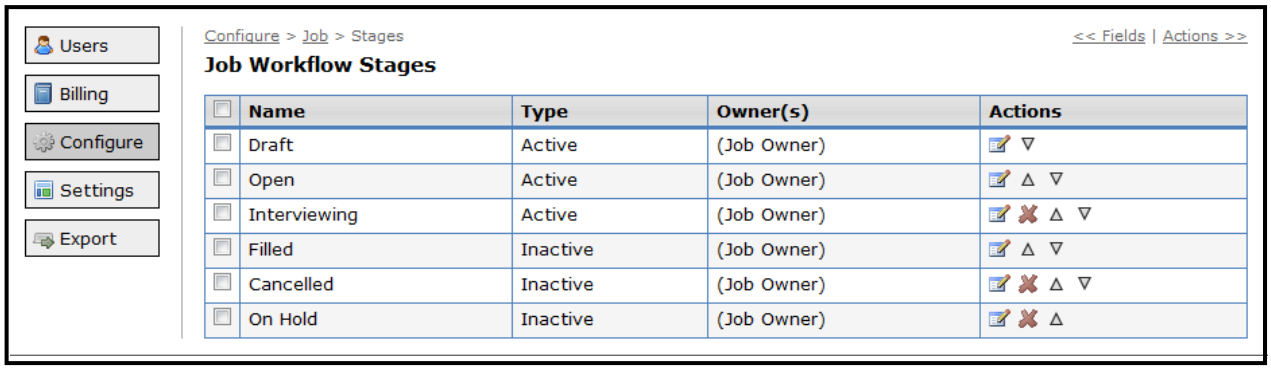
Or, a rule can be created with a source of **Resume** that will either assign a certain number of points to the candidate or indicate they are unqualified if that word or phrase is found in their Resume text.

Anytime an online application comes into the system, the rules will be run and the candidate's scoring will be displayed. Rules can also be run manually if additional rules are added after the application has been received.

Workflow

Each organization has a unique way of managing the hiring process. ApplicantStack can be customized to support your workflow, track the status of the job and candidates, capture the appropriate documentation and help keep stakeholders informed and engaged.

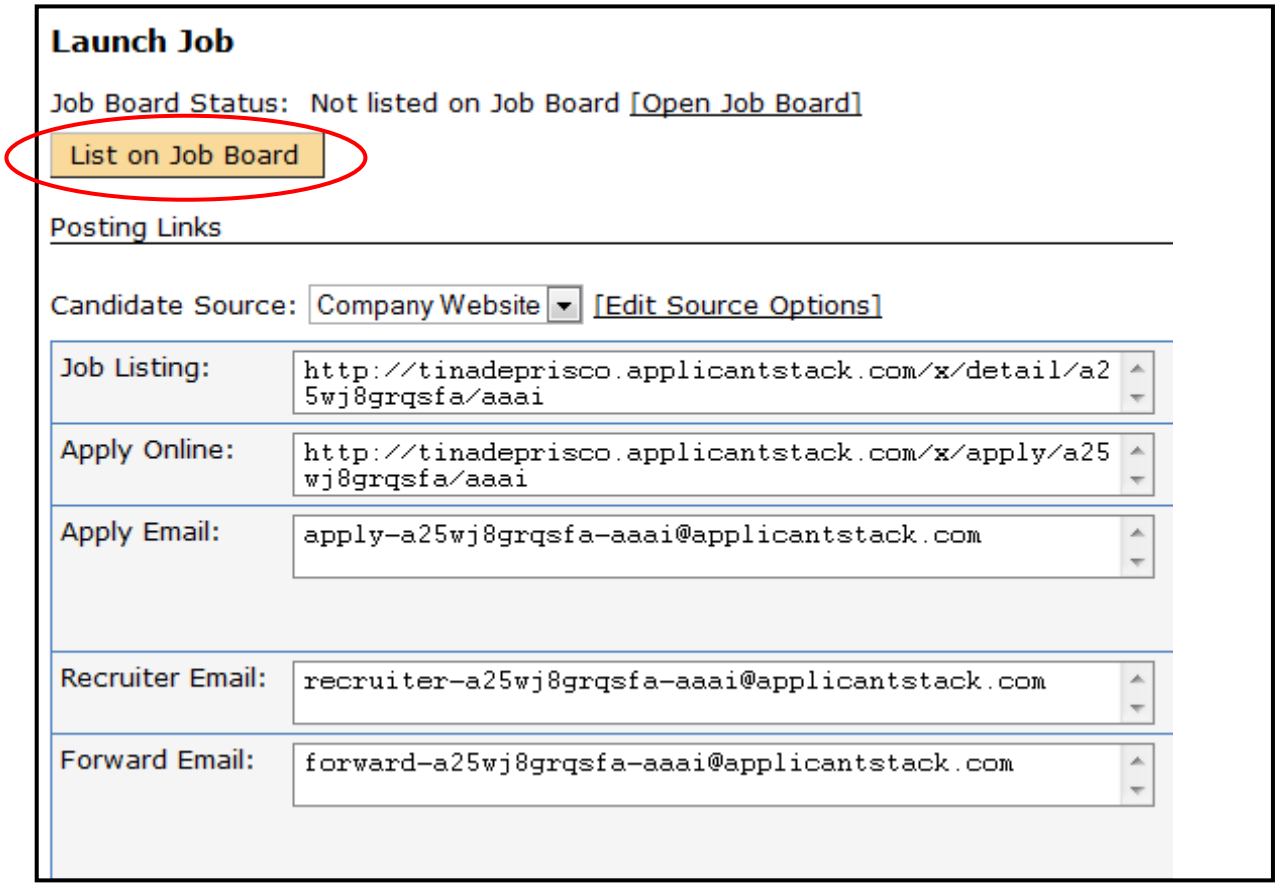
By selecting the **Workflow** tab, you can view the Workflow Stages that have been completed. The Workflow stages are set up and edited either via the **Configure** Button on the Workflow tab or from **Setup** (for more information see Setup section).



While being developed, a Job is in *Draft*, once it is ready to post on the **Job Board** the Stage can be changed to **Open** from the **Workflow** tab.

Launch

The **Launch** tab provides the ability to post the job to your job board by clicking **List on Job Board** as well as serving as a point of reference for all the posting links that can bring candidates into the system through other sources.



Selecting the **Source** is important as the page will display the specific Posting Links that will allow the system to distinguish where the application was initiated. The URL's listed can be used for other communication mechanisms to direct the applications and resumes into the system.

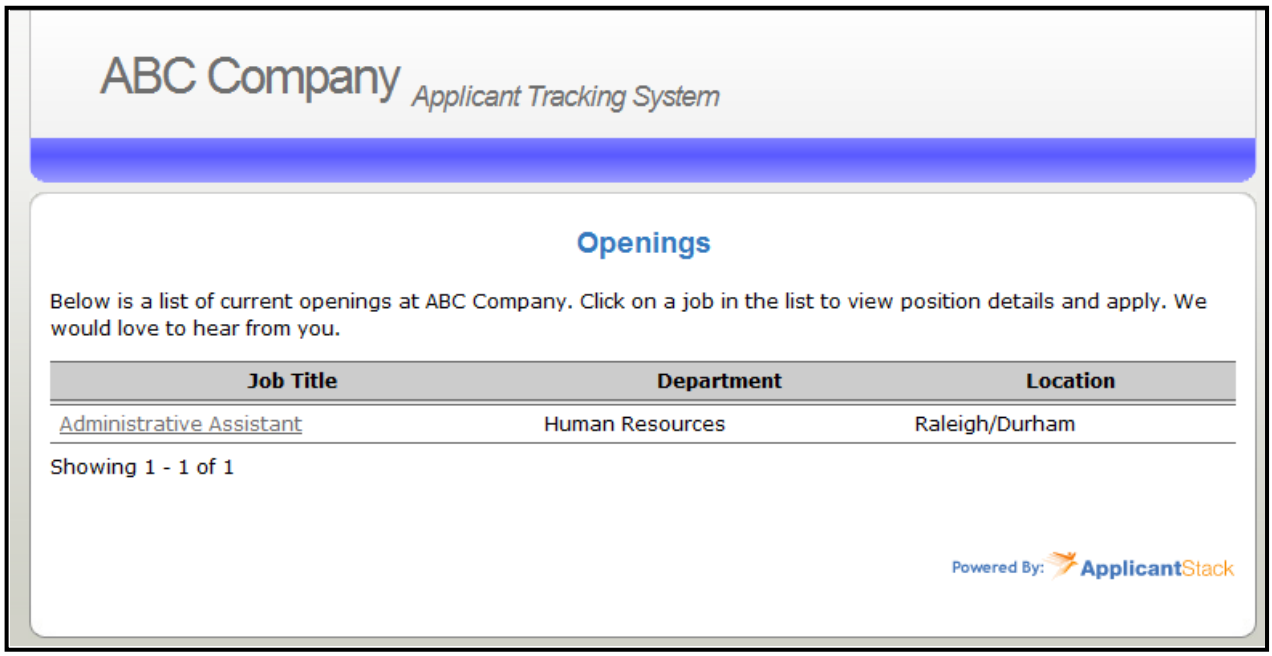
Notes

Notes offer users a place to document additional information regarding the job. The Notes are specific to the job and can be used to document important information that can be shared across the organization in one location.

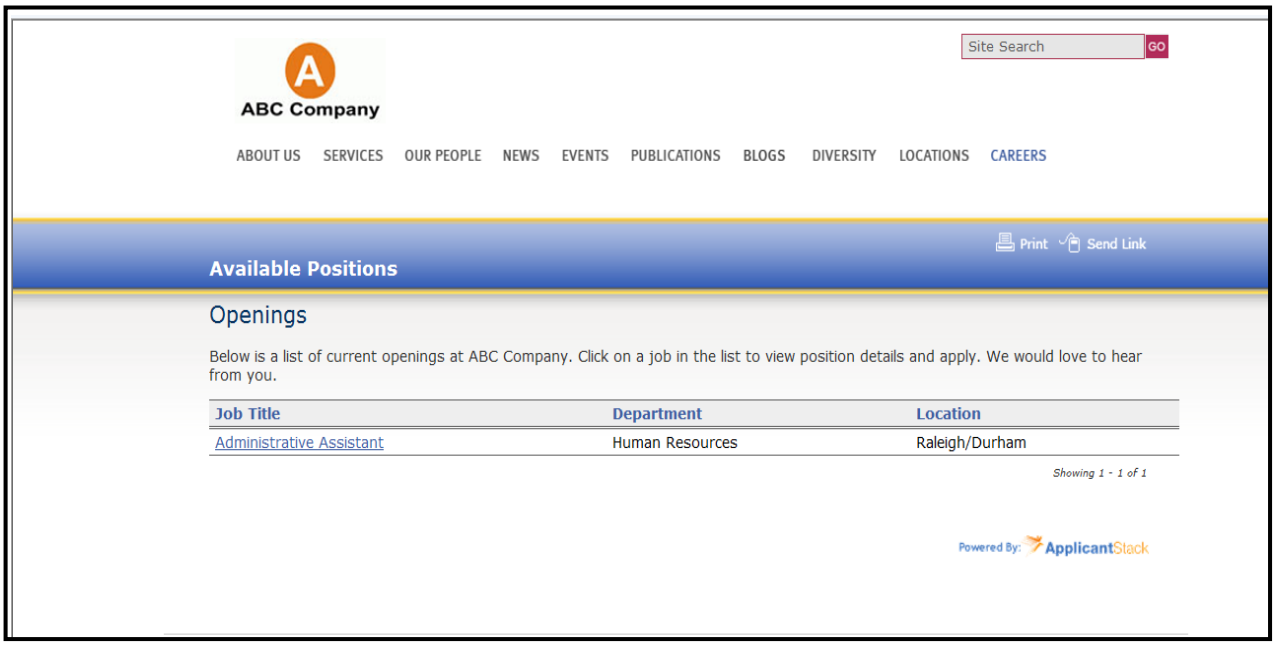
You are now ready to accept online Applications!

	To access the Job Board, click Open Job Board on the Launch tab.	

From your **Job Board** page, applicants are able to select a Job and view the Listing as well as Apply for the Job immediately. Utilize the standard Job Board template (as pictured below):



Or we can build you a custom template to match your website for a seamless display:



	Contact your ApplicantStack support representative to ask about building a custom job board template that matches your website.	

By selecting the Job, the Applicant is presented with the Job Description and the ability to Apply:

ABC Company *Applicant Tracking System*

Openings >> Administrative Assistant

View Job - Administrative Assistant

Job ID: 1
Job Title: Administrative Assistant
Department: Human Resources
Location: Raleigh/Durham
Description: Immediate need for Human Resource Assistant.

Business Description:

Work for one of the world's leading suppliers of ABC Products. With manufacturing facilities in North America, Asia and Europe, its products are used in a wide range of consumer and industrial applications.

The HR Assistant reports directly to the Human Resources Director and is located in Raleigh, NC.

Job Responsibilities:

The HR Assistant assists with the administration of the day-to-day operations of the HR department. The HR Assistant carries out responsibilities in some or all of the following functional areas: HRIS, employee relations, benefits, and administration.

Key Responsibilities:

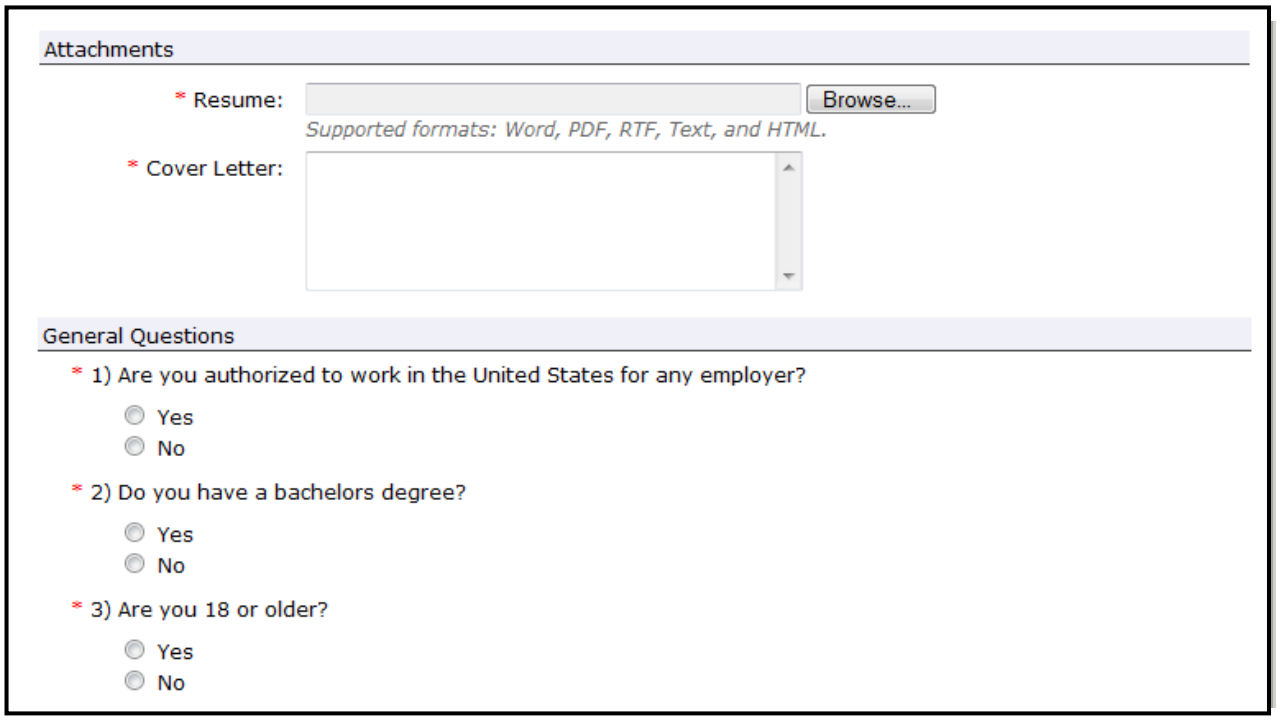
•Create and maintain confidential employee files to ensure all required documents are in place.
•Assist with HRIS database maintenance.
•Prepare employee badges and input information in to time keeping system.
•Assist with new hire orientation.
•Respond to employee inquiries.
•Assist in auditing and reviewing HR files/documents.
•Assist in preparation and distribution of employee announcements, reports, and other communications.
•Provide administrative support to the HR department.
•Assist with special projects as needed.
•Assist in preparation for audits
•Assist in policy development and documentation

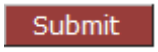
Qualifications:

•Must be actively seeking a degree in Human Resources or related area
•Computer and Internet proficient; specifically with MS office applications
•Experience with Ceridian HRIS or other HRIS applications
•Proven ability to work independently and as part of a team.
•Demonstrated organizational skills, ability to multi-task and attention to detail is required.

Apply

Once the applicant selects **Apply**, they are brought into the online application and prompted to enter basic contact information *(for more information on Application Configuration options see Setup section).* The applicant is also directed to attach their resume, provide Cover Letter text as well as answer any questions that have been associated with the Job.



Click 

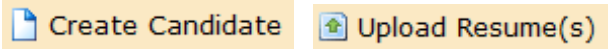
and the application is on its way to the ApplicantStack Work Queue!

Candidates

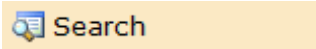
Being able to effectively and efficiently manage candidates who apply for the Jobs within an organization is critical to Human Resource professionals. Especially in today's climate where hundreds of applications are received for one position, being able to quickly prioritize qualified matches is critical.

From the **Candidates** tab, users can filter and sort the full list of Candidates in the system by Job, Stage, Source, Score or Rating. This offers the user the ability to view the list in a way that is meaningful to their objectives.

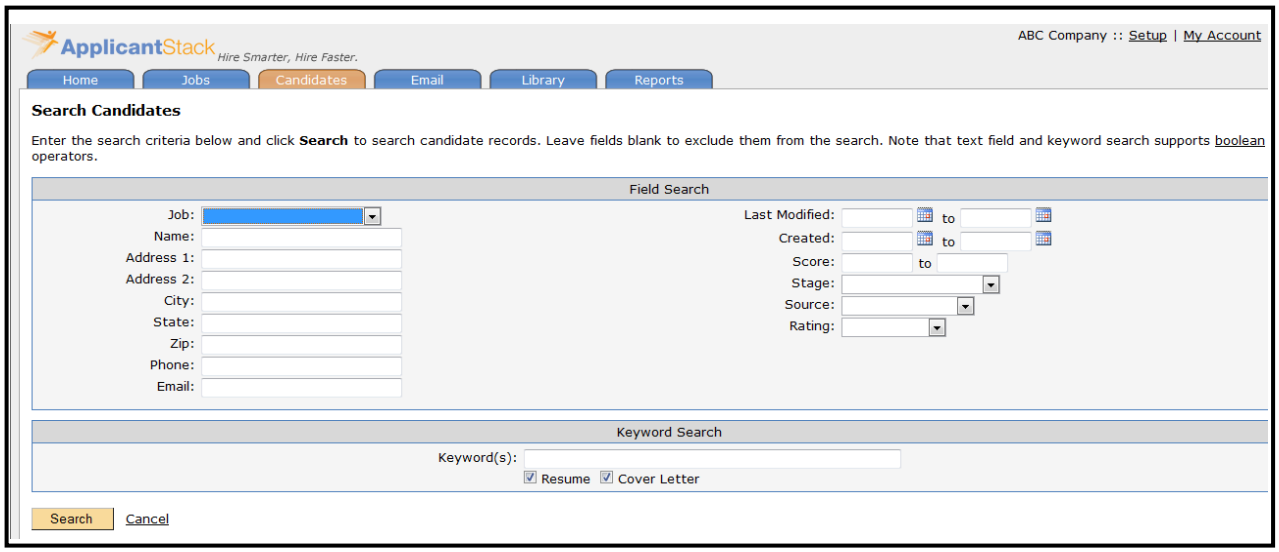
Right from the grid, users can perform many actions in the system. Some of the most utilized:



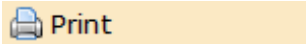
In additional to bringing in Candidates through online applications, utilize **Create Candidate** or **Upload Resume(s)** to manually create a Candidates or load in Resumes received from other sources to produce individual Candidate records in the system.



Candidate Search also offers a quick and easy way to find a specific candidate or group of candidates. Demographic information or a Keyword in a Resume or Cover letter helps to quickly and easily find the Candidate.



ApplicantStack offers numerous **Email** capabilities for bulk e-mailings to candidates as well as internal users. Need to communicate a single message to all Candidates who are no longer being considered? Simply filter the Candidate list and the same e-mail can be sent to all candidates who meet that criteria or Forward multiple candidates to an internal user by Email.



Meeting with a Candidate face to face? Utilize the **Print** feature for a printer-friendly printout of the complete online application.

	Access Candidate's details by clicking on their Name link or select the details icon from the grid.	

Summary

Summary provides a complete Candidates view at a glance.

Resume

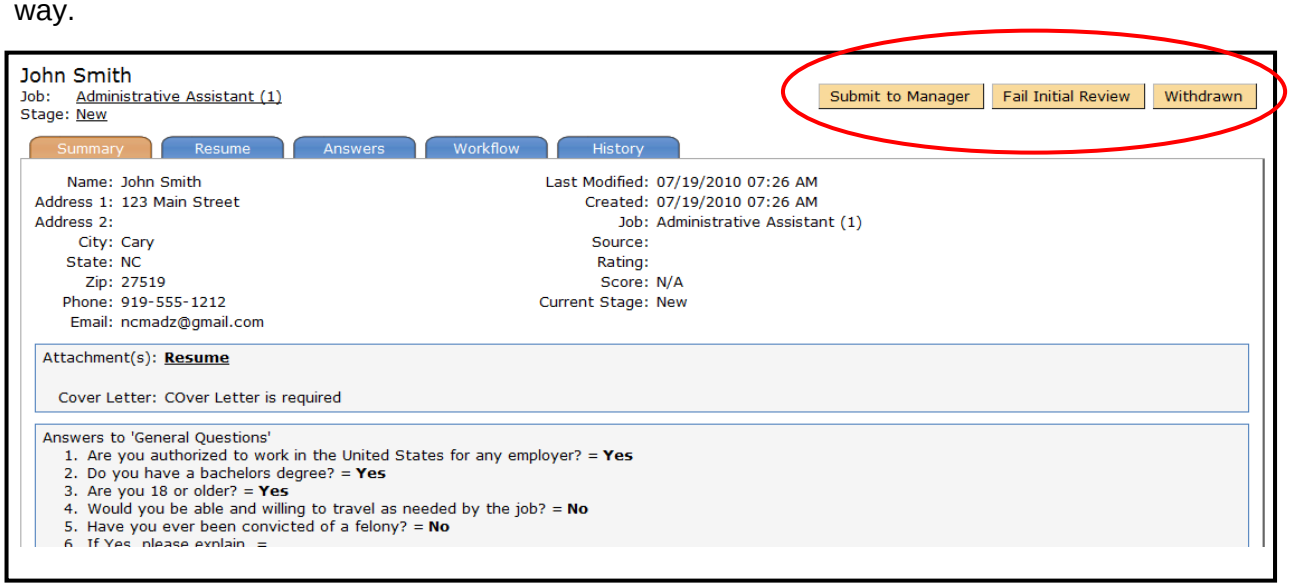
By selecting the **Resume** tab the user is presented with the full resume as submitted by the applicant. There is no need for excess attachments or spending time looking for the file or the paper resume; easily access the candidate's information with one click.

Answers

Selecting the **Answers** tab shows the candidate's answers to any Questionnaires that are associated with the Job. Additionally, the ability to open another questionnaire and answer it for the candidate is available and a useful feature to capture additional data after the initial application.

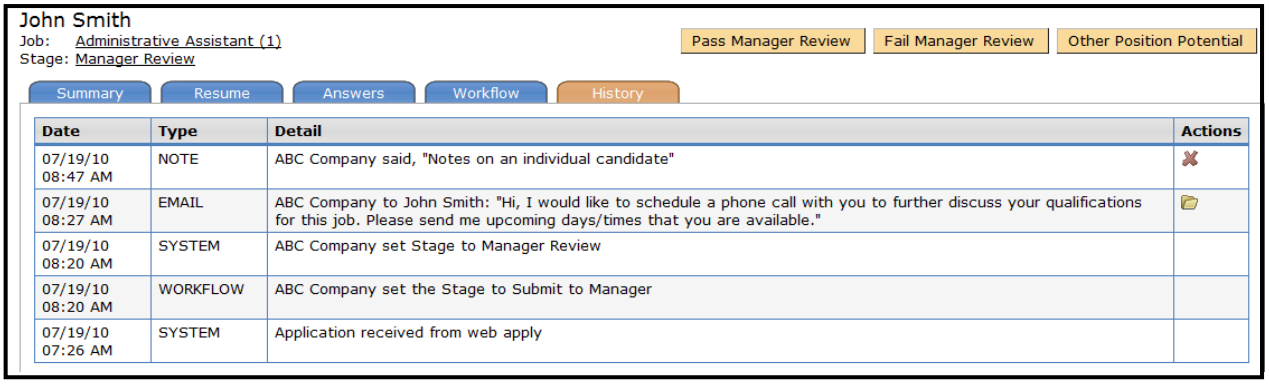
Workflow

At any point while in a Candidate's record, the **Workflow** buttons are available. This allows users to send a candidate to the next step in the hiring process. Clearly displaying the stage the Candidate is currently in, internal users can manage the process and candidate each step of the way.



History

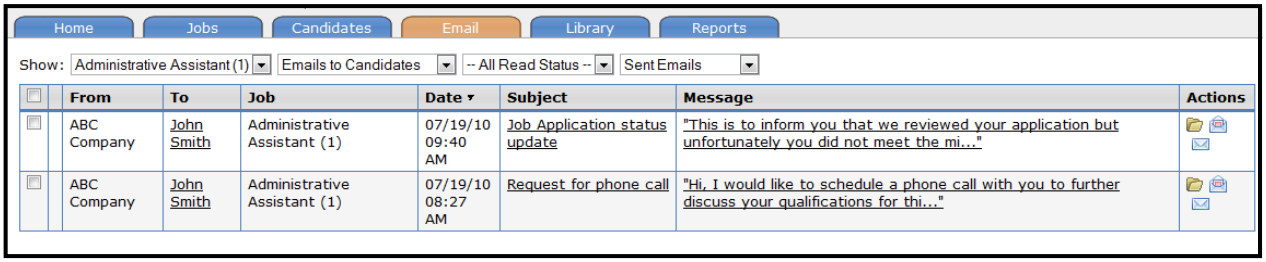
History is a useful chronological summary of all the actions that have taken place for a candidate.



Date	Type	Detail	Actions
07/19/10 08:47 AM	NOTE	ABC Company said, "Notes on an individual candidate"	
07/19/10 08:27 AM	EMAIL	ABC Company to John Smith: "Hi, I would like to schedule a phone call with you to further discuss your qualifications for this job. Please send me upcoming days/times that you are available."	
07/19/10 08:20 AM	SYSTEM	ABC Company set Stage to Manager Review	
07/19/10 08:20 AM	WORKFLOW	ABC Company set the Stage to Submit to Manager	
07/19/10 07:26 AM	SYSTEM	Application received from web apply	

Email

Manage all the **Email** sent through the system for tracking and reference. View Email for a particular Job, Recipient Type, Read or Unread mail as well as filter for Received or Sent mail.



Library

Simplicity and re-usability are available through the use of the ApplicantStack **Library**. The Library makes it possible to create Templates for Listings, Questionnaires as well as Emails. Long gone are the days when your organization had to re-create job descriptions and applications for each new opening. Using the word processing feature, users create **Templates** that can save time and create structure.

In addition to saving time, Templates add consistency to the process. Through Templates, users are able to develop standard formats and re-use Job Listings for positions that are filled often. Constructing a standard set of questions provides a baseline for all online applications, and questions which are specific to the job can be added with ease.

You can save even more time by setting up **Email Templates** to send out automatically to candidates as they move through your process. Assign a **Trigger Stage** to an email template and it will be sent out automatically when a candidate is moved to this stage of your process. You can use triggers for things like sending an Email to a candidate when their application is first received, when they are rejected as being unqualified, or when they are selected for a phone screen or interview.

Reports

ApplicantStack **Reports** offers your organization flexible and powerful reporting capabilities. This module offers features that range from a simple report to show how many Jobs are being managed per month to a detailed listing of candidates that can be exported from the system.

A standard set of reports are offered with the system as well as the ability to create Ad Hoc reports. When creating an Ad Hoc report, users are able to decide which data you wish to

report on (Job or Candidate data), choose Summary or Detail report and finally decide what data fields you wish to bring into the report.

Setup

Once you are ready to begin to customize ApplicantStack to meet your organization's recruiting needs, you will want to review the Setup for all the modules. This section provides a brief overview of the options you have when configuring the system.

Users

Under User Setup Administrators can create and maintain the information on the Users of the system. Additionally, **Contacts** can be setup. Contacts are not granted permission to log on, but are setup in the system so that they can easily be sent Candidate information from the system.

Capture basic contact and password information and determine what access the User(s) needs within the system. Below lists the permissions granted when assigning the security level to a User:

Security Level	View Job & Candidates	Edit Job & Candidates	Create Job & Candidates	Templates & Reports	Setup
Administrator	X	X	X	X	X
Recruiter	X	X	X	X	
Hiring Manager	X				

Configure

Configure is broken down into three sections, Configure Job, Candidate and Application.

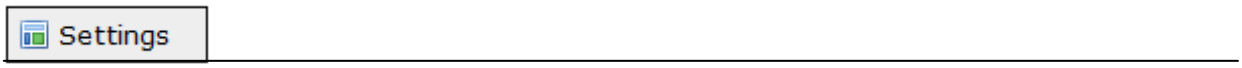
Configure Job walks you through determining basic **Job Fields** that need to be captured such as Department and Location of a Job. Also determined are the **Workflow Stages** specific to Jobs such as Open, Interviewing, Filled, Cancelled. The **Workflow Actions** are also setup, determining what actions are appropriate within a Stage.

Candidate fields designate the information you wish to collect on every candidate. This can be as basic as collecting demographic data to asking more detailed questions that your company captures on all applicants.

Configure Application also walks the Administrator through determining basic **Application Fields** needed such as the Source or Rating of the Application. As with Jobs, determining the **Workflow Stages** and **Workflow Actions** specific to the Application process is available. These fields illustrate to users the status of the application (i.e. in interviewing or reference

check) as well as the Actions needed to be taken along the way (i.e. Failed phone interview, Passed Manager Review).

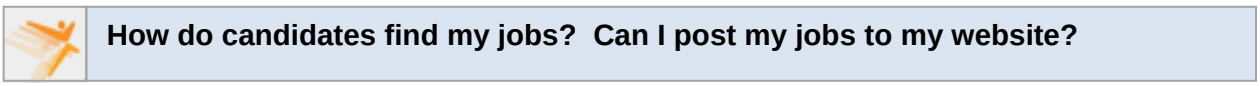
Job Workflow Stages also allow customization of the system to reflect the steps in an organization's hiring process. By assigning Owner(s) of a Stage they can be notified when there is activity in the stage such as a new candidate or job to review.



Company Settings are established for **Account** settings and **Job Board** settings. Choices to be made include:

- Organizational and Domain Names
- Email address as it appears to applicants
- Determine if applicants Apply online or simply send a resume via email
- Establish if Resumes and Cover letters are required to Apply
- Will you ask and track EEOC data (i.e. Gender, Race)
- Do applicants need to create an account on your Job Board to Apply, which allows them to edit their application later.

Frequently Asked Questions



If you have a company website, it is recommended that you add a link from your website to your ApplicantStack job board to direct your website visitors to view and apply to your jobs. Contact your webmaster to request they add a link to the Openings page of your ApplicantStack job board.

If you are linking to your Job Board from your website, we can build a custom job board template to match your website and provide a branded, seamless experience for your users. Contact your ApplicantStack support representative for details.

In addition to linking from your website, you can post your jobs to other third-party job boards like Monster.com™, CareerBuilder™ or CraigsList™. Although ApplicantStack doesn't automatically post to third-party job boards at this time, you can create the job post according to that job board's directions and direct people to apply through ApplicantStack using the **Apply Online** link from the Launch tab of the job.

I have an employment application that I would like candidates to fill out when they apply online. Can I put it on my job board?

Yes, you can collect all the information you normally capture on your employment application or other forms as part of the online application by using the Questionnaires functionality in ApplicantStack. By converting a form to a Questionnaire you can collect the data in a simple electronic form and utilize online validation to ensure you collect all the information you need from candidates.

There is a standard Employment Application Template in the Library that can be used, or your existing application can be converted into an ApplicantStack Questionnaire. Contact your ApplicantStack support representative to ask about converting an existing employment application or other forms into ApplicantStack questionnaires.

Who in my organization will need a User login to our ApplicantStack account?

A user login is necessary for anyone who will be logging in to your account to post/manage jobs, administer the system or review candidates. Typically, this includes HR staff and recruiters, administrators, and hiring managers. ApplicantStack has flexible roles and permissions built into the system that allows you to give users access to only the functionality, jobs and candidates that they need to perform their job.

Can I export Data from ApplicantStack?

Yes, there are a number of ways to export your data out of ApplicantStack. We offer a simple CSV/Excel export of your data by creating a Report that contains your Job or Candidate Details, then exporting the report to a CSV (comma separated value) file. CSV is a generic delimited text file format which can be opened by numerous software programs, including Microsoft Excel™.

To get a complete export of your data, go to the **Export** page under Setup. From there you can download an **SQL Export** of your database file which your IT administrator could use to recreate your database locally. You can also download an **Attachments** file which contains all the resumes and other attachments uploaded by your candidates.