Specifications Overview

## What is BALANCE*trak*?

For recruiters, Human Resource personnel, and hiring managers – tasked with attracting, screening, and hiring the right candidates for job openings – BALANCE*trak* software provides recruiting-to-hiring support –

### Home page Dashboard

Key notifications, saved views, and graphical objects (Requisition status and recent Job Seekers) are at your fingertips.

### Manage Requisitions

Build job postings, with intuitive tools to:

- Develop, save, and reuse job descriptions
- Initiate or participate in an approval process
- Post to branded Career page and job boards
- Communicate with colleagues
- View Job Seekers who applied, with quick links to Job Seeker tools

### Review Job Seekers

- Search for candidates; review resumés
- Review and communicate with Job Seekers
- Set up Calendar events, and send Job Seeker information to others
- Submit candidates for third-party background check, and hires for onboarding
- Assign status to applicants
- Review openings a Job Seeker has applied to
- Submit or approve a candidate for hire

### Reports

Customize and output reports on key Requisition and applicant tracking statistics.

### Job Seeker Experience

Integrated with your organization's Website, a Career page will display custom content, job postings, and tools to assist Job Seekers.

- Mobile-optimized job application, including an available integration with *Indeed Apply*

### Custom Implementation by Berkshire

Berkshire's Implementation team will align settings to your organization's workflow, and for Federal contractors, install an applicant tracking system to support AA/EEO/VETS requirements:

- On-line prescreeners, applications, self-ID forms, assessments, and scoring schemes
- Unique requisition/hiring approval processes
- Integrations with job boards and other vendors
- Notification preferences and email templates

### On-line Access

- Compatible with Chrome, Firefox, Edge, and Internet Explorer
- Collaborate with an unlimited number of users from any location, at any time

### Product Support

- In-line Help documentation, video tutorials, and *Training Guide*
- Technical support by telephone and email is included as long as a client account is maintained.

### Security

- 256-bit https on-line platform via Transport Layer Security, data are encrypted in transit (For best safety, use a current browser.)
- Password requirements include minimum length, complexity, version control, and expiration
- Access to tasks and information is controlled by system roles and permissions
- 24/7-monitored data center with physical and network security is SSAE-16-certified and meets the PCI Data Security Standard

| Module | Tools |
|---|---|
| **Account Settings** | Customize defaults for:<br>• Task-area home-page views<br>• Receipt of notifications on Job Seeker/Requisition activity<br>• Time zone |
| **Home Page**<br>***All pages:***<br>*Side navigation menu to access task areas* | **Dashboard** features include:<br>• Pie Chart (Current Requisitions)<br>• Graph (Recent Job Seekers)<br>• Calendar of upcoming events (including “send to” Outlook)<br>• Notifications (Requisitions/Job Seekers requiring approval)<br>• Saved Views list (most-used searches and filters) |
| **Requisitions (Job Postings)**<br>***Special List Features:***<br>*Search, sort, filter, and access job postings*<br>*View Requisitions by status, such as accepting applications*<br>*Customize and save views for future use, based on sort and filter settings* | Add Requisitions to the system:<br>• Auto-generate Requisition numbering or enter for each job opening<br>• Enter or select required information for each job posting, and set start/end dates<br>Requisition information menu and toolbar:<br>• Update Requisition information<br>• Send emails to colleagues about Requisition matters<br>• Assign status, which initiates “intuitive” tools at each stage until Requisition is closed<br>• Copy a Requisition as the starting point for another one<br>• View number of applicants; jump to Job Seekers list for the Requisition<br>Build and use the Requisition:<br>• Develop or import the job description (or use the job title’s default description)<br>• Post job opening to the branded Career page and on-line job boards (with third-party contracts), and track costs by posting<br>• Start or participate in the Requisition approval process, using automatic email notifications, tools, and a comment field; resubmit for approval, as necessary.<br>• Upload associated documents<br>• Keep track of Requisition Calendar events, such as interviews<br>• View Requisition history, and keep a record of (and share) related notes<br>• Export Requisition data<br>Review Job Seekers who have applied:<br>• See resumés, application responses, and test scores<br>• Review current status, as well as status of background check and hiring approval, as applicable<br>• Access the full Job Seeker record |

| Module | Tools |
|---|---|

**Job Seekers**

**Special List Features:**

*Manage, search, sort, filter, and access candidate records*

*View Job Seekers by requisition and category, such as recent or not reviewed*

*Search resumés*

*Customize and save views for future use, based on sort and filter settings*

Toolbar buttons are available to:

- Open Job Seeker documents and forms
- Assign applicant status
- Send Bulk emails (using original text or existing templates) to Job Seekers
- Forward Job Seeker information and documents to colleagues
- Flag and review a group of Job Seekers at the same time
- Import a resumé to add or update Job Seeker data

Use the Review Job Seeker detail:

- Update Job Seeker information, including password security functions
- View openings the Job Seeker has applied to, along with submitted forms (and test scores, if applicable)
- Access the most recent cover letter or resumé
- Add a supplementary document to the Job Seeker's record
- Track system activities in, or add a note to, the Job Seeker record

Perform Job Seeker-related actions:

- Send a form to the Job Seeker for completion
- Copy the Job Seeker to another Requisition
- Add a calendar event, and send Job Seeker information to colleagues
- Submit Job Seeker for background check (with external contract)
- Initiate or participate in the hiring approval process, with automatic email notifications and tools; view approval status and history
- Submit the hired applicant for third-party onboarding (with external contract)
- Export Job Seeker data (including to BALANCE*aap*)

**Reports**

**Special Features:**

*Determine export settings for report results*

*Organize, filter, and sort results to customize reporting content*

***Select from a list of built-in reports:***

**Executive Summaries**
- Job Seekers
- Requisitions
- Open Requisitions
- Closed Requisitions

**Referral Source**
- Referral Source Summary
- Individuals with Disabilities
- Veterans
- Applicant Status

**Requisitions**
- Open Requisitions
- Closed Requisitions
- Requisition Detail
- Drop Off Rates

**Job Seekers**
- Job Seekers by Requisition
- Hires

**EEO**
- Applicant Detail
- Applicant Summary
- EEO Counts
- Job Seeker Zip Code Analysis

**History** (Administrator)
- Requisition History
- Job Seeker History
- User History
- Search History



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| **Administrative Settings**<br>*Designated client-side Administrator only* | Update and add to existing libraries (see below) in support of workflow changes:<br>• Reference tables (e.g., create new answers for a form question; import/save job descriptions by job title; create menu of position types for Requisitions)<br>• Questions, form templates (prescreener, application, self-id, background check, assessment), and scoring schemes<br>• Approval process for Requisitions and candidate hiring<br>• Email templates and notifications |
| **Custom Implementation** | **Berkshire will build initial settings and libraries —** |
| **Client Settings**<br>*Customized by Berkshire for client workflow* | User list, with system permissions:<br>• Functional Profiles to control access to task areas by role (e.g., Recruiter, HR Administrator, Hiring Manager)<br>• Data Profiles to control data access levels (e.g., Read-write, read only)<br>• Access to Requisitions by business unit<br>Default Account settings *(which can be changed by the individual user later)*:<br>• Select task-area home-page views<br>• Set how and when to receive email notifications on Job Seeker/Requisition activity<br>• Select time zone<br>Branded Career page on the Web:<br>• Includes custom content; a job postings table, with necessary links for the Job Seeker to log in and complete the job application; plus EEO language<br>• Will allow Job Seekers to search, sort, subscribe to job postings in areas of interest, and send job postings to friends<br>Job Seeker settings:<br>• Determine when Job Seekers become visible to users<br>• Define Applicant Stage and Applicant Status<br>• Option to create separate application paths for internal and external applicants<br>Requisition settings:<br>• Order Requisition fields; define Requisition statuses; and define how the system will close Requisitions and assign Job Seeker status, when closed<br>• Integrate with America's Job Exchange, Careerbuilder, Indeed, Monster, us.jobs<br>• Integrate with particular background screening and onboarding providers<br>• Option to limit the number of Job Seekers<br>Reference tables (Determine specific menu values; e.g., applicant disposition codes)<br>Templates:<br>• Set up questions, forms, assessments, and scoring schemes for screening Job Seekers (e.g., exempt, non-exempt)<br>• Set up email templates for communications with Job Seekers and colleagues<br>Approval processes for Requisitions and hiring |


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