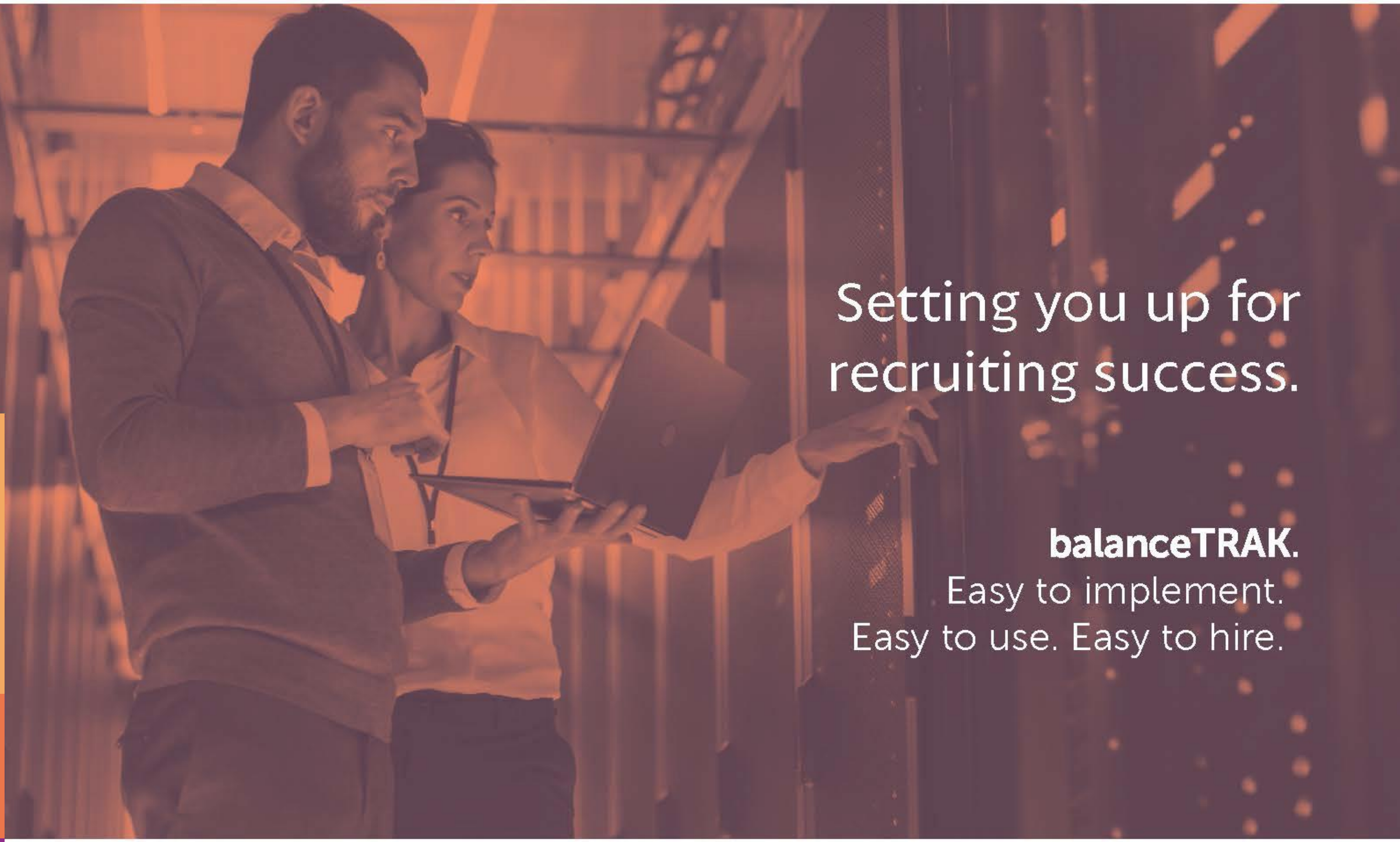

Help Topics for Administrators

Version 4.0

balance|TRAK

Table of Contents

*Below are **Help** topics, specifically geared towards **balanceTRAK** Administrators. Simply click on one of the links below. If you need further technical assistance, contact Berkshire's Product Support.*

For best navigation in this document, keep Acrobat's Bookmarks column open, located on the left side of the page display.

Resolve Duplicate Job Seekers (Administrators only)

KEY TOPICS:

- About the Administrative Feature to Resolve Duplicates
- Review and Resolve Duplicate Records

About the Administrative Feature to Resolve Duplicates

When this optional Administrative feature is in place, the system scans the **Profile** for each Job Seeker to determine whether identifiers indicate the potential for duplicate records. On the Job Seeker list, each item in question will be marked with the **Duplicate** icon, adjacent to the Job Seeker Name.

In addition, the *tab header* in each relevant Job Seeker detail will present the **Duplicates** tab (between **History** and **Screenings**) to support the Administrator in resolving any issues or merging records, as needed.

> ***Note:*** Client Settings control both the installation of this feature and the formula used to determine which records qualify as potential duplicates. If you have questions, please contact Berkshire's Product Support.

Review and Resolve Duplicate Records

Quick Tip for Multiple Duplicates of the Same Name: Before you begin, conduct a Search by Job Seeker Name to reduce the Job Seeker list. Then, sort the duplicates by Application Date / Descending. Highlight the uppermost record on the Job Seeker list to activate the most recent record. This will place the most recent record in the first *column* position on the **Duplicates** tab.

In one of the identified Job Seeker details:

1. Access the **Duplicates** tab. Here, a *column*, comprised of data entries, will represent each equivalent Job Seeker Profile.^
2. Review the Job Seeker records to determine which record represents the most current, accurate, or relevant record. Above this *column*, click the **[Select]** button for: Primary Job Seeker.
3. Fields that were scanned for matches between that record and the other(s) will display in bold font. Teal highlighting indicates Fields in which the Primary information will be retained, and the secondary version(s) dropped.^
4. Identify the record(s) to be merged into the Primary record, and above the *column(s)*, check off the record(s). (The Primary Job Seeker cannot be selected.)
5. Select the **[Merge]** button, located at the boĀom of the window.
6. Click **[Save]**.

^***Notes:***

- Depending on the software Implementation, up to nine Fields may display. The data entries will include iden. fiers, such as Name, Date of Birth, Address, City, State and Date Applied – Requisition Number.
- The formula for determining poten. al duplicates is based on the number of Fields to be scanned and the number of matching identifiers among those Fields.
- Review the data entries carefully because identifying information in the secondary records will be lost during the merge.
- Since the Date Applied and Requisition Number entries will be appended together in the merged record, these entries are shown in a plain font.
- Federally covered employers should merge records rather than delete a Job Seeker.

An entry in the **Job Seeker** detail > History will log that the record has been merged.

BalanceTRAK > Reports > Export (Data)

KEY TOPICS:

- What Default Data Exports are Available?
  - Restore Defaults
- Prepare a Data Export by Selecting Filters and Fields
  - Determine **Filters**
    - Set Location (If applicable)
    - Set Date Parameters
  - Select **Fields**
  - *Outline of **Job Seeker** Export Options*
  - *Outline of **Requisition** Export Options*
- Save an Export View for Future Use
  - Delete a Saved Export View
- Use a Saved or a Default Export View
- Run the Export

Export BalanceTRAK Data to Excel

Job Seeker and Requisition data can be saved to Excel for use outside of **balanceTRAK** — such as for inclusion in a federally required Affirmative Action plan (AAP) or for data research. This feature is available under **Reports** in the *side navigation menu*, by choosing **Export**.

To ensure you obtain the necessary data and to improve processing time, **Export** displays tabs for honing in on data by: **Job Seeker** OR **Requisition**. Within those data sets, parameters include Location Code (if applicable), Requisition Category, Fields, Date Range, and the like.

For those who would like to run recurring exports, an Export view can be saved for reuse. The settings for a saved Export view (e.g., Date Range) can be further adjusted as necessary (and saved). In addition, the system provides some typical Job Seeker exports as defaults, as described in this article, next.

What Default Data Exports are Available?

Default Export views are available on the **Export > Job Seekers** tab, with preselected Filters that produce the most typically needed Job Seeker "snapshots":

- **Job Seekers**
- **AAP Import** — Includes demographics and SELF-IDENTIFICATION for disability and Veteran statuses for inclusion in an Affirmative Action Plan.

  The Date range must also be set to reflect the annual or interim AAP analysis period. See *Set Job Seeker Date Parameters*, above.

  BalanceAAP Users: The data set can then be imported into this companion application.

  Hires — Job Seekers with a Disposition Code indicating "hired"
- **No Disposition Code**
- **No Job Seeker Stage** (if applicable)
-

Quick Tip: As described in this article, parameters for Application Date, Posting Start Date, and/or Posting End Date can be added to the Default Export to produce an Export for a particular time period.

Restore Defaults

To return to the Default Export parameters after Filters have been changed, choose the **[Restore Defaults]** button from the *upper toolbar*.

Prepare a Data Export by Selecting Filters and Fields

While preparing an export, **Job Seeker** and **Requisition** menus will be presented to you in a similar fashion, but the variables will be specific to each of the two databases. *Therefore, the instructions below are followed by outlines that list the available Job Seeker and Requisition variables.*

Begin by selecting **Job Seeker** OR **Requisition** from the **Export** *tab header*. Then follow the steps below to organize data by the following sub-tabs:

- Filters
- Fields

Determine Filters

Review the upper menus, which are organized into columns that represent each variable and the variable's corresponding data entries. Make selections from these menus to hone in on particular information to include in the export. Along with these menus, you will also find status Category options as check box options.

Set Location (If applicable)
If your organization has only one Location, the corresponding Location Code will be selected, and you can proceed. Multi-location clients will select one or more work sites.

Set Date Parameters
Each date-range query will provide a drop-down menu, comprised of options for choosing a relative date range (e.g., Current Year Quarter). Select one.
OR

Select: Custom. Then, configure the date range with entries (two-digit month/two-digit day/ four-digit year).

Select Fields

☑ Make selections from the provided check boxes to include specific Fields.

> ***Quick tip:*** If your organization has numerous Fields (e.g., Job Codes), enter a few letters or digits in the **Search** box to help locate the option.

Outline of Job Seeker Export Options

The following options for **Job Seeker > Filters** are available:

- Location
- Requisitions (by Job Title, Requisition Number)
- Job Seeker Stage
- Disposition Code
- Requisition status Category (Pending, Open, Closed)

Job Seekers can be included, based on Form completion:

- Prescreener
- Assessment
- Application
- Self-ID
- Background Check
- Other

Within **Filters**, there are five options for limiting data by date range:

- Hire Date
- Application Date
- Status Date

- Posting Start Date
- Posting End Date

The following options appear on the **Job Seeker > Fields** sub-tab:

- Personal Information
- Requisition Fields
- Form Types (PRESCREENER, APPLICATION, and if applicable, ASSESSMENT)
- Questions

Outline of Requisition Export Options

The following export variable for **Requisition > Filters** are available:

- Category (Pending, Open, Closed)
- Location

In addition, the following date ranges can be applied:

- Date Created
- Closed Date
- Posting Start Date
- Posting End Date
- Internal Posting Start Date
- Internal Posting End Date

Requisition > Fields include, but are not limited to:

- User Access Code
- Requisition Number
- Job Code
- Job Title
- Type of Employment
- Salary Range
- Posting Start Date
- Posting End Date
- Employee Acceptance Date

- Employee Start Date
- Recruiter
- Hiring Manager
- Location
- Tracking Code
- Posted Internally
- Education Level

Save an Export View for Future Use

After selections have been made, the current Export configuration can be saved in the system for display in the *upper drop-down*. Click the fourth button in the *upper toolbar*, **[Save]**, and enter a name for the view.

Delete a Saved Export View

The saved Export view can be removed from the system by choosing the adjacent **[Delete]** button.

Use a Saved or a Default Export View

Once the view is saved, it will be available for selection, along with the system's default export views.

1. ▾ Simply expand the Change Export *drop-down*, located in the *menu header*, and make a selection.
2. ☑ Checked boxes will indicate the current settings for the Default Export. Review, and edit as necessary.
3. (Optional) *Set the Date Parameters*, as described above.
4. Select the **[Run Export]** button from the *upper toolbar*.

Run the Export

Finally, click **[Export]**, and **[Open]** or **[Save]** the file.

BalanceTRAK > Settings > Reference Tables

KEY TOPICS:

- What are **Reference Tables**?
- Select a Reference Table to View
    - Sort by a Reference Table Column
    - Display Inactive Codes
- Rename an Existing Table
- Edit a Reference Table Code
    - Make a Code Active/Inactive
    - Add a Code to a Reference Table
    - Delete a Code from a Table
- Add a Reference Table
- Import Reference Tables
- Export Reference Tables
- Special Settings by Reference Table

Manage Reference Tables

By accessing **Settings > Reference Tables**, the user with appropriate Administrative-level permissions can manage tables that are necessary for **balanceTRAK** operation.

Before Making Changes

Administrators: *Because **Reference Tables** are critical for software operation, please take the following steps before making changes:*

- Review this article, and *Special Tools by Reference Tables*, as linked above.
- Consult Berkshire's Product Support at product.support@berkshireassociates.com, or call (800) 882-8904, for guidance.

What are Reference Tables?

Organized by topic, **Reference Tables** serve as "legends" for the information your organization collects as job openings are advertised and filled. In doing so, these tables house the options, or codes, you will have when entering data or making menu selections in **balanceTRAK**.

Some codes will be specific to your organization's workflow for filling job openings. Others may be answers to Questions, to be completed or selected by the Job Seeker on a Form.

The following Reference Tables are typically present in a **balanceTRAK** Implementation:

- Applicant Type
- Disposition Code
- Gender Code
- IWD (Individuals with Disabilities) Status (Self-ID form)
- Job Seeker Stage
- [Location] Code
- Job Code
- Referral Source
- Position Type
- Race Code
- Veteran Status (Self-ID form)

Each Reference table will have specific content, with most tables including *columns* for: Code and Description. All tables will also display the following *columns*:

- In Use
- Active (based on user selection to display this *column*, as outlined below)

Select a Reference Table to View

From the Select Table drop-down in the *upper toolbar*, ▾ choose a table, and the associated information will be displayed for review and editing, as described below.

Sort by a Reference Table Column

Sort the Reference Code table by clicking on a *column header title*. Click the *column header* once to sort in ascending order. Click the *header* again to sort in descending order. Click a third time to remove the sort.

You can also sort by multiple columns. The multiple-column sort will show the codes in the order in which the columns were clicked.

Display Inactive Codes

For a complete display of the table, check the box next to the upper tagline: ☑ Display Inactive Reference Codes.

Rename a Table

If the Reference table contains no records, the table may be renamed. Choose the **[Rename]** button from the *upper toolbar*; update the entry, and click **Save**.

Edit a Reference Table Code

After the table is selected for viewing, click the **Edit** icon for a record, activating the line item. Make any necessary changes, and click the **Save** icon.

Make a Code Active/Inactive

If the Reference table record displays a ✔ **Check mark** in the Active *column*, other users may select that code in menus where it applies.

To make the code inactive, enter the record from the Active/Inactive display (as described above). Then, deselect the check box. Click **Save** to gray-out the **Check mark**.

> ***Note:*** When a current code is made inactive, the code will no longer be available for new records, but the code will appear for Requisition and Job Seeker records that previously used the value.

Add a Code to a Reference Table

> ***Example:*** Your organization has a new type of "Contract" position, so the Position Type Reference table needs to be updated to make this menu option available when a new Requisition is created.

Click the **[Add]** button in the *second-level toolbar*. A line item will be added to the table. Enter: Code and Description; then click **Save**. By default, new codes are: ✔In Use.

Delete a Code from a Table

Once the table is displayed, click the **Delete** icon to the left of the record.

Add a Reference Table

> ***Example:*** Your organization is adding a Question to the APPLICATION Form that will present answer options to the Job Seeker.

Choose the **[Add]** button from the *upper toolbar*, and enter a: Table Name. Click **Save**. The Table Name will be added to the Select Table drop-down, and an empty table will display. Continue with adding line items, representing each code (as described above).

Import Reference Tables

If the Reference table does not exist in the system, add the table (as described above). From any **Reference Tables** screen, click the **[Import]** button. An import wizard will guide you through five steps:

1. **Select Import Type —** Most users will select: External Data.^

2. **Select Tables —** Move one or more tables from the Tables Available *column* to the Tables to Import *column*. Click **[Next]**.

3. **Upload Files —** If an external source, select a file type:

    - Excel
    - Access
    - Text

    Locate the file on your computer. Click **[Next]**.

4. **Match Import Tables and Fields —** If using an Excel file with multiple tables, select the sheet name. Match the system's fields to the fields in the incoming table. Fields marked with an asterisk (*) are required. You can refer to the Preview of data at the bottom of the page.

5. **Process Data —** Select one of the following options:

    - Overwrite (Delete all existing records and replace)
    - Overwrite Matching (Delete and replace only records that match)
    - Append (Add to existing records)

    Click **[Import Data]** to complete the process, and view results, which will indicate whether the process was successful. (Optional) Check to box to: ☑ Save my files for later use.

Finally, you may choose the next designation:

- Back to Import
- Return to Reference Tables

^***BalanceAAP users:*** If you have created an Affirmative Action plan in ● **balanceAAP** with the relevant table(s), you may select to: Import from balanceAAP (and select the plan, using the provided drop-downs).

Export Reference Tables

From the page for any Reference table, choose the **[Export]** button from the *table header bar*. ☑ Check the box for each table you want to include, or select: All.

At the bottom of the menu, select a File Type:

- Excel 97-2003
- Excel 2007
- Text (CSV)

Click the **[Export]** button. Then download, save, or print the file.

BalanceTRAK > Settings > Special Settings by Reference Table

KEY TOPICS:

- Job Code
  - Import a Job Description for a Single Job Code
  - Import a Job Description for Multiple Job Codes
  - Associate a Video with the Job Description
- Job Seeker Stage and Disposi. on Code
  - About Auto Assign and Status
  - Order Values (for use with Auto Assign)
  - Manage Job Seeker Stage Notifications
  - Implement Silver Medalist Ranking for Job Seekers
- Location Code
  - About Location Codes and Multiple Career Pages
  - Assign to Career Page

Use Tools for a Specific Reference Table

Access to editing **Reference Tables** or changing table-related settings is limited to users with Administrative-level permissions. Serving as a reference for Administrators, this article describes special management tools, associated with Reference Tables for Job Code, Job Seeker Stage/Disposition Code, or Location Code.

Administrators: Because **Reference Tables** are critical for software operation, please do the following before making changes:

1. Review *Reference Tables* (earlier page) and this article.
2. Consult Berkshire's Product Support at a product.support@berkshireassociates.com, or call (800) 882-8904, for guidance.

Important Tip: To begin working with a Reference table that is not currently displayed, select the table (by name) from the *upper toolbar*.

Job Code

Job Codes are the vehicle for linking each job posting with an associated job description. In this manner, Job Codes support your efforts in maintaining consistency as the qualifications for a position are communicated to potential Job Seekers across multiple or repeat job postings.

By accessing the Job Code Reference table via **Settings**, default job-description files can be imported into **balanceTRAK** from Word. The system will then parse the documents into the designated Job Description Sections.

First, select the Job Code table from the Select Table drop-down; then follow the applicable instructions below.

Import a Default Job Description for a Single Job Code

> ***Quick Tip:*** The system operates best when *section headers* in the imported document are bold, italic, or larger in size. You may also want to use *header terms* that match those used by the system. (To open an existing Job Description, select Edit in the Job Description *column*, where a link is available.)

Click the **[Import Job Descriptions]** button, located in the *upper toolbar*, to initiate this process:

1. Browse and locate the file on your computer. Then, click the **[Next]** button.
2. A menu appears to: Identify Section Headers. By default, the drop-downs will display every paragraph detected in the imported document.
3. (Optional) To reduce the drop-down display, make selections in the Filters menu (at the bottom of the page). Filter settings will direct the system to recognize *section headers* in the imported document by their formatting, including ☑ bold, italicized, and/or font size. If font size, is selected, also enter a value. Click **[Apply Filter]**. Return to the top of the page. From the Identify Sec on Headers menu, ☑check the box for each of the balanceTRAK Sections to include. Then, for each checked-off Section, choose matches from the corresponding Section Header and Next Section Header drop-downs.

   > ***Note:*** The Beginning of Document tag is available for the first Section Header; and the End of Document tag is available for the last Next Section Header. The system identifies the beginning and end of each Section, using these selections. The end of the one Section is typically, but not always, the beginning of the next.

   Click **[Next]**.
4. The Identify Job Code/Job Title menu displays. Locate an existing Job Code, using the drop-down, or select: Add New Code. ☑Check the box to overwrite (erase and replace) the previous default Job Description.^

   > ^ Select overwrite if a default Job Description already exists in the system. Any current Job Descriptions (i.e., stored within a Requisition) will not be affected.
5. Click the **[Import]** button.
6. After import, view: Import Results.

The file will be added to the Imported Job Descriptions list. Make any necessary edits by clicking the [Job Description File Name] and following the instructions to: *Edit an Existing Job Description*.

However, when working in a default Job Description, only one ption is available for applying edits — As appropriate, check the box for: ☑ Yes. Apply changes to all open or pending requisitions that use this job code.

Import Default Job Descriptions for Multiple Job Codes

Please familiarize yourself with the process for a single Job Code, described above.

Prepare Files: Before importing a group of Job Descriptions, review the steps for importing a single Job Description (above). Documents that are imported together must use the same Word template. If any document relies on a different template, you will have to import it separately.

Each file should include:

- File name that includes Job Title and/or a Job Code

  OR

- A section within the document that idenfies the Job Title and/or Job Code (e.g., “Job Title: Diversity Coordinator”)

Begin: Zip the group of document files together. Then click the **[Import Job Descriptions]** button to initiate the import process:

1. Browse and locate the Zip file. Click **[Next]**.
2. The Identify Section Headers menu displays, using the first document in the Zip file as a template for all others.

   ☑ Check the box for each of the balanceTRAK Sections to include (across all documents in the Zip file); then choose matches from the Section Header and Next Section Header drop-downs for each one.

3. If the drop-downs are too extensive, use ☑ Filters (at the bottom of the page). Click **[Next]**.
4. The Identify Job Code/Job Title menu displays — Choose how the system should find the job code or title:

   - **By File Name**

     OR

   - **Within File —** Select the Job Code format, either By Job Title or By Job Code; and, if necessary, enter the delimiter.

5. If the Job Code in a document is not found, designate one from the drop-down; or click: Add New Code (and follow the prompts).

   ☑ Check the box to overwrite the previous default Job Descriptions, if applicable. Click **[Import]**.

6. View Import Results.

Associate a Video with a Job Description

(Optional) When your organization's Job Posting Page is designed, a default video can be displayed with every Job Descrip on. With the Job Code table, a video can be specifically associated with a Job Code, via copy-and-paste of its URL:

1. Before you begin, make sure the video is composed in one of the following file types: Facebook Video, Vimeo, YouTube, FLV, MP4, and WEBM.
2. Copy the video's Internet address, or URL.
3. Access **balanceTRAK > Reference Tables > Job Code**, and locate the particular Job Code. Click the **Edit** icon.
4. In the Video URL *column*, paste the URL into the text field.

Save the Job Code entry.

Job Seeker Stage and Disposition Code

In **balanceTRAK**, the pillars of applicant tracking are:

- Job Seeker Stage (The applicant's current phase)

  AND

- Disposition Code (His or her final outcome)

Based on your unique hiring process(es), these two codes work together to help you document the Job Seeker's "journey," as each one moves through the consideration process. One or more Job Seekers are typically "dispositioned" (removed from consideration) during each Stage, until the process, if successful, culminates with a hire.

Examples of typical (or default) Job Seeker Stages include:

- New Applicant
- HR Review
- Hiring Manager Review
- Final Disposition

Examples of typical (or default) Disposition Codes include:

- Did not Meet Minimum Requirements
- Prescreened
- Schedule Interview
- Not Best Qualified
- Declined Offer
- Hired

About Auto Assign and Status

Although a Job Seeker’s responses to the PRESCREENER may trigger several possible outcomes, **balanceTRAK** can only “Auto Assign” one Stage or Disposition to a Job Seeker. Therefore, the Administrator can place these values in order of priority, by accessing the Job Seeker Stage and Disposition Code Reference tables.

Order Values (for use with Auto Assign)

Select the Job Seeker Stage table from the *upper drop-down*, and choose the **[Order Values]** button from the *table header bar*. If Job Seeker Stage is being used along with Applicant Disposition code, these buttons will be available for both Reference tables.

From the resulting menu, move a Stage (or Disposition Code) up or down in priority, by using the ▲▼ **[Up/down arrows]** on the right side of the entry. When the status positions are completed, **[Save]** the changes.

> ***Note:*** Table names may vary, according to system settings.

Manage Job Seeker Stage Notifications

For each Reference code, describing a Job Seeker Stage, an optional Notification system can be developed to alert user groups when the screening phase is selected for an applicant.

The code's Notification *column* will display links for Add or Edit , which enable set-up of a new Notification or the editing of an existing one, respectively. By accessing these links, Email Templates can be selected from a provided drop-down (or changed), and Notification audiences can be selected (or updated) by ⦿radio button:

- By User — Check boxes for email addresses will display for selecon.

  OR

- By Profile — A check-box list of Profiles will display for selection.

Click **[Save]** to apply the Notification settings.

Implement Silver Medalist Ranking for Job Seekers

When the **Silver Medalist** setting is in place, the system will hallmark the best "runner-ups," or finalists, who remain in the Job Seeker pool, based on Job Seeker Stage and/or Disposition Code. This designation serves as a filter to help users Organize the Job Seeke List by key indicators. Access to apply the 🏆**Silver Medalist** filter is available in the **Job Seeker** list *header*.

> ***Before you begin:*** Please review both Reference tables carefully. The codes underlying this designation should reflect yet-to-be-hired Job Seekers who have met or exceeded positive criteria as deemed by your organization.

If Job Seeker Stage is to be included, begin by selecting this Reference table from the *upper drop-down*. Click the **[Edit]** icon for a code to open the record, then select the box for: ☑ Silver Medalist. Click **[Save]** to apply the designation.

Hit the **[Back]** button, and move on to the Disposition Code table; repeat as necessary.

> ***Note:*** If you choose to apply **Silver Medalist** by both Job Seeker Stage and Disposition, keep in mind that Stage will have hierarchal control over Disposion.

This designation can be edited at any time.

Location Code

About Location Codes

If your organization has multiple locations using **balanceTRAK**, Location Codes serve to associate Job Postings with the proper establishment. Accordingly, if multiple branded Career pages were set up during Implementation, these codes ensure openings are posted on the intended page.

Depending on your organization's hierarchy, unit codes may also indicate other levels in the chain of command, such as division or subsidiary. If so, the Location Code table will include a *column* for the additional hierarchal unit(s).

> ***Important Reminder:*** If you are an Administrator, please contact Berkshire's Product Support before making changes to the Location Code table.

Assign to Career Page

First, display the [Location] Code table on the **References Table** screen, using the Select Table drop-down. Choose **[Assign to Career Pages]** from the *upper toolbar*. Then, select the target page from the Career pages drop-down. Next, using the radio buttons, ⦿ choose to display the menu of Location Codes:

- By Career Page

  OR

- By Location Code

From the menu, ☑ check off one or more codes to include. Click **[Save]**.

BalanceTRAK > Settings > Questions (Library)

KEY TOPICS:

- Overview of the Questions Library
  - Learn About Question Types
  - Five-step Outline for Creating a Question
- Add a Question to the Library
  - Review and Complete Basic Information
  - Include an Image (Optional)
  - Show Question for HR-use only (Optional)
  - Determine Options for Answers
  - Determine Permissions by Question
  - Preview the Question
- Work with Existing Quesons
  - View Requisition(s) having the Question in Use
  - Sort the Questions
  - Edit a Question
  - Delete a Question

Manage the Library of Questions for use in Forms

Note: The functions described below are typically displayed or activated for users with Administrative-level permissions. To inquire about the functions available to you, please contact your **balanceTRAK** Administrator or Berkshire's Product Support, as appropriate for your role and organization.

Overview of the Question Library

A library of **Questions** is stored in **balanceTRAK** under **Settings**. These **Questions** serve as the building blocks for: Settings > Form Templates. Some default **Questions** will come with your organization's Implementation. However, the **balanceTRAK** Administrator can create additional Questions or edit aspects of existing ones. The Date Created *column* will indicate when the Question was developed or last updated.

On the **Questions** list, the following *columns* help describe the Question for administration and Search purposes:

- Description
- Question Text
- Question Type

The following *columns* will identify the Question and its attributes by means of a ✔ **Check mark**:

- **Completed—** Indicates a Question has been developed and is currently available for use in Forms
- **In Use—** Indicates the Question is currently In Use as part of a Form
- **HR-use Only —** The Question will not display to Job Seekers.

Five-step Outline for Creating a Question

In addition to this article, please review *Learn About Question Types* and *Determine Options for Answers*. The steps necessary to develop a Question are to:

1. Add a Question, including determining: Type of Queson.
2. Complete the Edit Question screen.
3. Determine (answer) Options, which are specific to the Type of Question.
4. Assign Permissions.
5. Preview the Question (and its answer fields or options).

Add a Question to the Library

Begin by clicking **[Add]**. Enter the Question description, select the Type of Question, and click **[Save]**.

Review and Complete Basic Information

Enter the Question's content into the Basic Information menu, including appropriate punctuation. The entries for Queson Description and Type of Question made previously will be retained. (Required fields are marked with an asterisk.)

> ***Quick Tip:*** Once Type of Question is selected, it cannot be undone for the Question. However, if you have chosen and saved the type incorrectly, you may **[Add]** a new Question, and delete the incorrect one.

☑ Using the provided check boxes: Select the form types that this question can appear on. The default setting is to make the Question available for all Form types. Depending on the Implementation, the list may include:

- Prescreener
- Assessment
- Application
- Self-ID
- Background Check
- HR-use Only

Then, respond to the following prompts by clicking ⦿ Yes or No:

- When copying a job seeker, include the answer to this question.
- When exporting a job seeker, allow the answer to this question to be included.

Include an Image (Optional)

Display an image with the question by clicking ☑ Yes, for the prompt: Include an image with the question.

If so, select a position from the provided drop-down to place the image to the top, middle, or bottom, as well as to the left, center, or right. Click **[Browse]**, and locate the image file on your computer or network. Then choose **[Upload]** to complete the process. The image will display under the label: Current Image. To see how the image will appear, follow the instrucons below.

Note: The following image file types are accepted:

- BMP
- GIF
- JPEG
- PNG
- TIFF

To delete the image, return to the prompt for: Include and image with the Question; and select: ☑ No.

Show Question for Internal HR-use only (Optional)

If display and completion of the Question will be limited to HR personnel, check the box for: ☑ Make this question viewable ONLY internally.

> ❓ ***Cross-reference:*** This setting acts in concert with user profile settings. Administrators, please see: System Tools > Profile Management.

Select (Answer) Opons

For the next step, see: Determine Options for Answers.

> ***Note:*** You may **[Save]** the Question at any point, and return later.

Determine Permissions by Queson

On the Permissions menu, ⦿ select the appropriate rights for each Profile Name:

- No Access
- Read Only

  OR
- Read Write

❓ ***Cross-reference:*** To learn about how Profiles were developed, see: System Tools > Profile Management.

Preview the Question

To get an advance look at the Question (and its answer options), scroll down to the Edit Question / Preview menu. If changes are made, click Refresh to see an updated Preview.

Work with Existing Questions

View Requisition(s) having the Question in Use

Hover your cursor over the ✔ **Check mark** in the In Use *column* to open a pop-up caption, displaying one or more Requisition numbers. For each Requisition shown, the Question is currently In Use on a Form.

Sort the Questions

It may be beneficial to view Questions, sorted by such things as Question Text or Type. Click the *column header title* to perform a sort in ascending order, and click again for descending order. Click a third time to return to the default sort.

Edit a Question

Caution: Before making changes to an In Use Question, consider how an updated Form will impact active Requisitions.

From the **Questions** list, edit an existing Question by clicking the appropriate **[Edit]** icon. If the question is currently In Use, the Question type cannot be changed. Any changes to Questions that are In Use will only be reflected in the blank Form going forward; Forms already completed by Job Seekers will not be effected.

Delete a Quesotin

Remove Questions by selecting the corresponding ☑ check box; then click **[Delete Selected]**. Questions that are In Use cannot be deleted.

BalanceTRAK > Settings > Learn About Question Types

KEY TOPICS:

(By Question Type)

- Acknowledgement
- Check Boxes
- Date
- Label
- Long Text
- Numeric
- Option (Radio) Buttons
- Skills
- Table Driven
- Text
- Time Stamp
- Yes/No
- Signature

Below, **Questions** for Job Seekers are described by type.

Acknowledgement

An Acknowledgement Question is employed when a Job Seeker will confirm the reading or acceptance of a displayed policy or condition. In addition to acknowledging a statement you enter, the applicant can be asked to view an attachment.

Check Boxes

Check boxes are used to provide a list of answer choices to the Job Seeker. The Job Seeker may select one or more answers that apply.

Date

In answer to the Question, the Job Seeker will:

- Select a date from the provided calendar

OR

- Enter a date (using two-digit month, two-digit date, and four-digit year, separated by slashes)

Label

A label can be used to insert instructions, section dividers, disclaimers, or other desired text within the APPLICATION.

Long Text

The Long Text option can be used for Job Seeker Answers that require between 50 and 2000 characters.

Numeric

The Job Seeker must enter a numeric value when answering the queson.

Option (Radio) Buttons

⦿ The Job Seeker will view a series of options that will answer the Question, from which the Job Seeker must select only one.

Skills

A table will allow the Job Seeker to answer a Question by making selections by column and row.

Table Driven

The Job Seeker must select an answer that has been included in an imported Reference table.

Text

The Job Seeker must provide an answer with less than 50 characters.

Time Stamp

Typically for placement next to a Job Seeker's signature, the Time Stamp field will calculate the current date and time in the Form, finally ending with the date and time at which the Job Seeker clicked **[Finish]**. Accordingly, the Question content will most likely serve as a field tagline, or caption. Because this "answer" is a system field, the entry is not editable by the Job Seeker. This field may also be applicable to an HR Form, for internal use only.

Yes/No

⦿ The Job Seeker must select “Yes” or “No” as the answer to the question. The Question may be configured to ask for additional information, based on the Yes/No answer, including: Text, Date, or Long Text.

> ***Example:*** A Question inquiring whether the applicant has a valid state driver’s license must be answered “Yes” or “No”.

Signature

The Job Seeker will sign the field with his or her mouse.

BalanceTRAK > Questions > Determine Options for Answers

KEY TOPICS:

- Learn about Question Types
- Select Answer Options (where Applicable by Question Type)
    - Check Boxes
    - Long Text
    - Option (Radio) Buttons
    - Skills
    - Table Driven
    - Text
    - Yes/No

Select Answer Options (where Applicable by Question Type)

While some Form Ques. ons will simply require the Job Seeker to enter text, others in the **Questions** library will require the Job Seeker to make selections from answer menus or provide further information. Therefore, the Edit Question menu offers tools to create answer Options, based on the Type of Question.

Once the answer Options have been determined, as described below, a Question will be ready for use in Form Templates. In the **Questions** library, a ✔ **Check mark** in the Complete *column* will indicate a Question has been saved with appropriate answer Opons.

The Edit Question menu, including Options (or Additional Information), can be accessed in two ways:

- A er a Question is added (and the type determined), the system will automatically direct you there.
- From the **Questions** list, click the Question's **Edit** icon.

Form Types without Answer Options — A Question belonging to one of the following types *will not* display the Options (or Additional Information) menu:

- Acknowledgement
- Date
- Label
- Numeric
- Signature

Check Boxes

From the Edit Questions / Options menu, choose **[Add]**; and follow instructions on the Add Option window. (Optional) Using the provided drop-down, indicate whether the Job Seeker must also provide: Additional Information; and select:

- None
- Text

  OR
- Date

Long Text

The Additional Options menu will display the following tagline:

> Use the following information from the job seeker's résumé to answer this question.

In answer to this prompt, select an existing RESUME Section (e.g., Qualifications) from the provided drop-down. Information provided by the Job Seeker in that RESUME Field will be automatically entered into the answer Field.

Option (Radio) Buttons

When the Options menu appears, choose **[Add]**; and follow prompts on the Add Option window. If applicable, indicate whether the Job Seeker must provide Additional Information, using the provided drop-down, and select: None, Text, or Date.

Skills

Using the Skills menu, begin by setting up the number of *columns* (up to five) and rows to include, by clicking the ✚ **Add** icon for each axis, as many times as needed. Starting with each *column*, enter the *column header* text, and select a question type from the provided drop-down:

- Text
- Date
- Check box
- Table Driven (described next)

Add the row header text for each row.

To remove a *column* or *row*, click the ✖ **Delete** icon.

> ***Example:*** A Skills table could be set up so that the Job Seeker can rate his or her experience with Office products. A row would be provided for each Office application, with *columns* representing level/years of use.

Table Driven

From the Options menu, select the Reference table that contains the possible answers to the Table Driven Question. You can also identify the choices that require Additional Information, and define that information.

Example: Your organization asks each Job Seeker to answer the Question, “Are you an External or Internal candidate?" If the Job Seeker chooses "Internal", your organization would now like to make a secondary request: "Please select your current department.” Based on answers stored in the "Department" Reference table, the Internal Job Seeker could make a selection.

Table/Driven would be selected as the Question type, and “Applicant Type” would be chosen from the (Reference) Table Name drop-down.

❓ ***Cross-reference:*** To learn more, see: Reference Tables.

Text

Using the provided Additional Options menu, a Job Seeker’s RESUME Field can be linked to the answer to Field (when included on the RESUME). Select a RESUME Section from the provided drop-down.

Yes/No

Using the Additional Options menu, drop-downs will be provided for the following prompts:

- When the job seeker selects the following answer: (Yes, No)
- Ask them to provide the following information: (None, Text, Date)

Example: A Question inquiring whether the applicant has a valid state driver’s license must be answered “Yes” or “No”. Option Text may be included with the “Yes” answer as follows: “If Yes, provide the expiration date”. The Job Seeker would then provide a Date.

BalanceTRAK > Settings > Form Templates

KEY TOPICS:

- Tabs for Form Types
  - *Learn about Form Types and Workflow*
- Form Template List Tools
  - Sort the Form Template List
  - Review an Existing Form Template
  - Deactivate an Existing Form Template
  - Delete an Existing Form Template
- Introduction and Finish Pages (by Form Type)
- Add a Form Template
  - Design/Edit a Form Template
- Other Tools in the Form Template Table
  - Add or Edit a Scoring Scheme (Optional for Prescreener, Application)
  - Set the Default Self-ID Form

Manage Forms to be Completed by Job Seekers

Accessible for an Administrator, a library of default Forms is stored at **Settings > Form Templates** for display to (and completion by) the Job Seeker. One or more Forms from this library, as organized by type (e.g., APPLICATIONS, ASSESSMENTS), are assembled for inclusion in a Requisition, when the Requisition is created or edited.

The Administrator may update this library, as needed, including editing some aspects of Form Templates and creating new templates, based on existing ones.

> ***Note:*** If you have questions about **Settings**, please contact your system Administrator or Berkshire's Product Support, as appropriate for your role and organizaon.

Tabs for Form Types

Existing **Form Templates** are organized in lists by the following types, each represented in **balanceTRAK** by a tab in the *primary tab header*:

- **Applications —** For collecting key information by applicant audience (e.g., Internal, External, International, Non-Exempt)

- **Assessments —** To gauge the skill level of applicants in job-related tasks, with PASS or FAIL scores
- **Prescreeners —** To screen applicants on basic minimum requirements
- **Self-ID Forms —** For collecting voluntary information from the Job Seeker on race, gender, disability status, and protected Veteran status
- **Background Check Form —** To gather additional information from the Job Seeker, as required for a background or credit check
- **HR —** Create Forms for HR- or internal-use only, such as one containing the INTERVIEW questions.
- **Other —** For Forms that do not fit into other categories.

> ***Note:*** For clients who have implemented a "short application" via **Indeed Apply**, an **Indeed Apply** tab will house the necessary Form.

A er choosing the Form type, proceed to the *secondary tab header* and choose the **Templates** sub-tab, which displays a list of any existing Templates.

The Templates are each identified, by ✔ check marks as applicable, to be:

- Active
- In Use

Form Template List Tools

Since a library of default **Form Templates** will already be in place (as part of software Implementation), Administrative tools support the maintenance and augmentation of this library.

Sort the Form Template list

The Form Template list on any tab may be sorted by clicking on the Form Name (or other displayed) *column header*.

Review an Existing Template

Enter an existing Form Template by clicking the **Edit** icon corresponding to a Form Name, which opens the Form Template detail.

Deactivate an Existing Form Template

After locating the Form Template entry, simply click the active ✔ check mark, located in the Active *column*. Then, in response to the displayed pop-up menu, click **[OK]**.

The ✔ check mark will then gray out. In addition, the inactive Form Template will not be available for selection by other users. Requisitions with the Form Template In Use will no be affected by the deactivation.

Delete an Existing Form Template

To remove a Form Template from the list, navigate to the entry. Then press the **[Delete]** button, located adjacent to the **Edit** icon.

> ***Note:*** Form Templates that are In Use cannot be deleted.

Introduction and Finish Pages (by Form Type

Use the *secondary tab header* below the **Form Templates** *tab header* to develop or edit content for the Form Template's **Introduction** and **Finish** pages. Content will apply across all Forms in the Type. When the content for these pages is left blank, the pages will not display to the Job Seeker.

> ***Example:*** The **Finish** page includes the words "Thank you" by default. Further acknowledgement or "next step" information for the Job Seeker could also be included. Please note that if the Job Seeker is completing a series of Forms, the Finish page will only display for the final Form.

Click the **Templates** sub-tab to return to the Form Template list.

Add a Form Template

To create a new Form Template, click the **[Add]** button. From the Add Form Template menu, determine whether to:

- Start with a Blank Template — Enter a Template Name, and click **[Save]**.

  OR

- Copy from an Existing Template^
- Copy from an Existing Form^

Click **[Save]**.

^Follow the prompts to enter a Form Name, and select the source. Then click **[Copy]**.

Proceed to: Edit the Form Template. Meanwhile, the Form Template will be added to the system, displaying on the Form Template list.

Other Tools in the Form Template Table

Add or Edit a Scoring Scheme (Optional for Prescreener, Application)

For each APPLICATION or PRESCREENER Template Type, a Scoring Scheme can be assigned for use in comparing Job Seeker responses on those forms. Once a template has been added to the Form Template list, add a Scoring Scheme by clicking on the % **Add Scoring Scheme** icon. Once the Scoring Scheme is established, the **% Edit Scoring Scheme** icon will appear to the left of the Form Name.

Set the Default Self-ID Form

The default Self-ID form will be indicated by a ✔**Check mark** in the Default Form *column*. To select a different default, click the inactive, or grayed out, Check mark for the appropriate SELF-ID Form Template. A confirmation message will appear; click **[OK]**.

The system uses the default SELF-ID form when you select to automatically display the form or email it to a Job Seeker.

> ❓ ***Cross-reference:*** See: Design/Edit a Form Template / *Form Settings* / *For Self-ID Forms*.

BalanceTRAK > Settings > Design/Edit a Form Template

BEFORE YOU BEGIN:

Questions (Library)

KEY TOPICS:

- About the Form Template: Settings, Designer and History
- Basic Template Detail Tools
    - Preview the Form
    - Access or Add Form Sections
- Basic Section Tools
    - Instructions Box
    - Apply Changes to a Form Template
- Include a Question in the Form Section
    - Search for a Question
    - Preview Question Content
    - Add a Question to the Form Section
- Work with Included Questions
    - Icon Actions
        - Prescreener Knockout Questions
    - Order Questions in the Section
- Form Settings (by Form Type)
- View the Form Template History
- Scoring Schemes

Use the Form Template Detail, including Section Tools

About the Form Template: Settings, Designer, and History

By expanding the **Settings** *side navigation menu*, the Administrator may access the **Form Templates** library, organized by Form type. Here, a Form Template's detail may be accessed by Form Name for review (and editing). The detail is comprised of the following tabs:

- Form **Settings**
- Access the **Designer** tab to develop content by Form Section
- View the **History** of updates made to a Form Template

Each of these tabs are described below.

> ***Quick Reminder:*** To read about initiating a new Form Template, see: *Form Template List Tools / Add a Form Template*.

About Form Sections

As displayed on the detail's **Designer** tab, a Form Template is comprised of Sections that will display in order to the Job Seeker for completion. Depending on Type of Form, the following default Sections are typically available in the Add Section menu, which you will use to build the Form Template:

- Personal Information
- Position
- Eligibility Requirements
- Education
- References
- Employment
- Applicant's Statement
- HR-Use Only (for internal display only)

> ***Note:*** Additional Sections may be available for selection. For more information, contact Berkshire's Product Support.

How the Form Designer is Organized

The Form editor on the **Designer** tab is comprised of a *column* on the left with Questions and tools, plus a *working area* on the right, for use in building the Form Template. While some of the tools are common to all Form types, other tools will be specific to the Form type and Section. To begin, familiarize yourself with the menus and tools in the left *column* for including **Questions** in the Form Template, as described below.

Basic Template Detail Tools

Preview the Form

To get an advance view of the Form Template as the Job Seeker will see it, click the PREVIEW **Preview** icon, which is available in the *upper bar*.

View the Form in Printable Format

To preview the form in its printable format, choose the **PDF** icon from the *upper bar*.

Access or Add Sections

Sections that are currently included in the Form Template will be listed from left to right in the upper Section *bar* in the order the Job Seeker will see them. Click one to access the **Designer** tab for that Section.

To create more Sections, begin at the top of the page and click the ✚ **Add a New Section** icon. Then, select a Section from the provided menu.

Basic Section Tools

Instructions Box

At the top of the Section *working area* (the right-hand *column*) is a green field, which can be used to provide instructions to the Job Seeker. Simply click on the field to enter information.

> ***Example:*** A Job Seeker may be instructed to provide only 10 years of employment history in the Employment Section of the APPLICATION.

Apply Changes to a Form Template

As Form Template changes are made, click the **[Save]** button at the bottom of the page. Because forms originating from a Form Template are typically In Use, the system asks how changes should be applied when **[Save]** is clicked.

Using the ⦿ radio buttons on the Copy Form Template Sections Changes menu, select whether to:

- **Apply (the changes) to this template only**
- **Apply to this template and all active requisitions**
- **Apply to this template and all Requisitions**

Include a Question in the Form Section

Search for a Question

From the left *column*, navigate to: Add an Existing Question. Enter a keyword in the *menu header*, and click the **Search** icon. The Search can be cleared by clicking the ⊘ **Cancel** icon; this clearing action will restore the full list of existing Questions.

Preview Question Content (if applicable to Question type)

Hover the mouse over the ✚ **Plus sign** to the right of an existing Question.

Add a Question to a Form Section

After the Question is located (in the left *column* under: Add an Existing Question, simply click on the entry. The entry will move from the left-hand menu into the *working area* on the right side of the page.

Work with Included Questions

Icon Actions

To display the icons below and perform the related actions, hover the mouse over the included Question.

- ✱ (Make a Question) **Required** (for the Job Seeker to complete)
- **Edit Question** (in the Questions library)
- ✖ **Remove Question** (from the Form Template, and return it to the menus in the left *column*)

Prescreener Knockout Questions

An Applicant Status can automatically be assigned to specific answers for a some types of Questions^, if the answer precludes the Job Seeker from further consideration:

- Click the **Set Knockout Question** icon for a Question. A menu of possible answers for the Question will display. For each answer, select an Applicant Status or retain the default entry of: None. Click **[Save]** to apply.

^The following types of Questions will allow for applicant status to be automatically assigned: Option Buttons, Check Boxes, Table Driven, Numeric, and Yes/No.

> ***Example:*** A candidate who has less experience than the 10 years required could be automatically assigned a Status, reflecting insufficient qualifications. For answer(s) describing less than 10 years, choose from the drop-down: Does not meet minimum qualifications.

> ***Cross-reference:*** When auto-assigning Applicant Status, **balanceTRAK** will follow **Settings**. Refer to: Special Settings by Reference Table / *Applicant Status*.

Order Questions in the Section

Once a few Questions have been placed in the *working area*, they may be ordered, as desired. Hover the mouse over a Question; then drag it to a new location in the *working area*.

Form Settings (by Form Type)

For the Application, Prescreener, and Self-ID Forms, there are certain format **Settings** that can be modified for each Form Template, using the provided menus.

If a Form Template is being added, you will be directed to the **Settings** tab as the next step.

> ***Quick Reminder:*** To access the **Settings** tab, follow this path: **Form Templates > [Form type]** tab > Edit [Form Name] > **Settings** tab.

For all Form Types, you can set the following:

- Number the Questions
- Include Company Logo (in PDF version of form) — And **[Browse]** for a file (JPEG preferred) on your computer, and upload it.
- Enter Text for the Header (for the first Form page only) and Footer

For Prescreeners:

- ☑ Include Resume (and: Make Resume Required)
- ☑ Automatically take the job seeker to the Application — Also enter a: Message to Show Job Seekers. (Job Seekers will be shown the APPLICATION if they passed the PRESCREENER and were not assigned an Applicant (disposition) Status.)

For Applications:

- ☑ Include Resume (and: Make Resume Required)
- ☑ Include Cover Letter (and: Make Cover Letter Required)

For Self-ID Forms

Show Form (to Job Seeker):

- Manually
- Automatically
- Automatically with Opt-Out — Also enter a: Disclaimer / Opt-Out Message.

Remember to click **[Save]** to apply the Settings.

For Assessments

If your organization uses testing to screen applicants, **Settings** specific to developing the ASSESSMENT are available.

Once the ASSESSMENT is added to the system, determine the following Basic Settings:

- Set a completion time for the job seeker. Then select an Applicant Disposition code from the provided drop-down (to apply if the completion time is not met).
- Enter the score necessary to pass the test. Choose an Applicant Disposition code from the provided drop-down (to apply if the job seeker fails the test).
- (Optional) Select email templates from the provided drop-downs to use when communicating with those who pass or fail the test. (Email templates are described in the next segment of this manual.)
- ☑ Check the box if you would like to present varying sets of Questions as each Job Seeker applies. Then enter a number of Questions to include in each randomized ASSESSMENT.

    Note: Make sure the template includes enough Questions to support an effective randomization.

- Finally, enter the number of days the completed ASSESSMENT is valid.

View the Form Template History

To view the record of updates made to template, click the **History** tab while working in the Form Template detail.

Click on the **View Report** icon, located on the right side of the History list *header bar* to view the information in a new window. **[Print]** the information, as needed.

BalanceTRAK > Settings > Email Templates

KEY TOPICS:

- Default Email Templates
- Template Tools for Email Messaging
    - Select a Template to View and Edit
    - Rename a Template
- Add a Custom Email Template
    - Determine Email Template Settings
    - Delete a Custom Template
- Develop or Edit the Email Message
    - About Email Template Components
    - Edit the Subject Line and Message

        Enter Predefined Text into an Email Message

To review how the **balanceTRAK** user interacts with the software's email functions, see on-line **Help** at:

- *Send Email from the Job Seekers List*
- Job Seeker Detail / *Communicate with the Job Seeker*

Standardize Email Messaging by Implementing Templates

As part of your organization's **balanceTRAK** Implementation, a library of default Email Templates has been stored at: **Settings > Email Templates**. These templates serve as models for communicating consistently with Job Seekers (and colleagues) who are involved in the hiring process. The Administrator may edit existing templates and add custom templates to the system.

While all Email Templates may be renamed and edited (as outlined below), only custom templates may be removed. If any changes are made to the template, click **[Save]** to make it available to users for sending new email messages.

> ***Note:*** If you have questions about **Settings**, please contact your system Administrator or Berkshire’s Product Support, as appropriate for your role and organizaon.

Default Email Templates

— For Job Seekers

Key default templates, with links to Forms for completion by the Job Seeker include:

- Send Application Form
- Send Background Check Form
- Send Self-ID Form

Other default templates for communicating with Job Seekers:

- Invitation to Apply
- Send Auto-Acknowledgement (On receipt of APPLICATION)
- Send Offer letter

— For Collaborating with Colleagues

The following default template allows balanceTRAK users and external addressees to review the Job Seeker:

- Send (Job Seeker's) Information

— System Notifications

Below are some examples of default templates that serve as system notifications or reminders:

- Application Completed Daily Reminder
- Background Check Completed
- Hire Notification
- Requisition Closing Today

Template Tools for Email Messaging

Select a Template to View and Edit

To edit an existing Template, first select an Email Template from the Template drop-down, a menu located in the *header toolbar*.

> ***Reminder:*** Default **Email Templates** may not be removed.

Rename an Existing Template

Select the template from the upper drop-down; and click the **[Rename]** button. Update the entry for: Template Name; and click **[Save]**.

Add a Custom Email Template

Create additional templates by choosing the **[Add]** button from the *header toolbar*. Enter a Template Name, and click **[Save]**. The Email Template will display, and its name will show in the Template drop-down in the *header toolbar*.

A custom template may meet your organization's needs to send a special Form, document, or confirmation message to a Job Seeker. When communicating with colleagues, a template may be created to alert colleagues about a new Job Posting or to share a Job Description.

Determine Email Template Settings

Once a Template is selected from or added to the upper drop-down, choose to:

- ☑ Have balanceTRAK use the template when automatically sending emails

  OR

- ☐ Leave the box unchecked

> ***Important Quick Tip:*** By selecting the automated option, some merge fields, [Your Name], [Your Email Address], [Your Phone Number], and [Link to Form] will not be available. Leave the box unchecked, and use the **[Send Bulk Email]** button, which is available in **Job Seekers** and **Requisitions**. This method puts you in control of when an email, based on a template, is sent.

Next, use the Email Template Recipient options to identify the audience, either:

- Job Seekers

  OR

- Other balanceTRAK users

Delete a Custom Template

After selecting the template from the upper drop-down, click **[Delete]**. In response to the confirmation message, click **[OK]**.

Develop the Email Message

About Email Template Components

An Email Template is comprised of the following components:

- Recipient audience
- Subject Line
- Message, or Body Text

Within the Message are two types of content:

Text — Or plain words of the Message. The same Message will go to all recipients for the type of communication.

Tags — Also known as predefined text, tags are placeholder for variable text that will be "merged" into the message when it is sent. Typically, tags, which are surrounded by brackets, reflect identifying elements that will vary, depending on the recipient and the communication.

Depending on template type, tags can be inserted to merge personalized information into the Job Seeker message, such as:

- Application date
- Job Seeker's name
- Link to:
    - Job description
    - Form
    - Third-party assessment
    - Offer letter
- Job Code
- Job Title
- Sender's contact information

About the [Link to Form] Field
The [Link to Form] field is a special tag in the email Message, when intended for Job Seeker recipients. This field places a link in the Message body so the recipient can complete a SELF-ID, BACKGROUND CHECK, or other Form.

Edit the Subject Line and Message

Both the default and custom email templates can be edited by users with proper permissions. First, select the Template from the *upper drop-down*.

Next, enter or edit the the: Subject Line; and edit/compose the corresponding Message in the provided *text editor*.

(Optional) Change the appearance of the text (e.g., color, font, alignment, size, format, bulleng , numbering), using the *text editor toolbar*, which contains common word processing tools. For examples of other shortcuts, you can:

- Paste formatted text from a Microsoft Word document, by selecting the **[Paste from Word]** button.
- Add a link to additional Web documents or a Website, by clicking the **[Link]** button.

Enter Predefined Text into an Email Message

Click on **[Insert Predefined Text]**, a button located below the *text editor*. From the Insert Predefined Text menu, use the ⦿ radio buttons to select either:

- Body Text

  OR

- Subject Line

From the provided drop-down menu, select the appropriate tag to include.

Click **[Insert]** to apply the action.

> ***Example:*** To send an email thanking Job Seekers who applied for an Account Execuv e posio n, click the **[Insert Predefined Text]** button, which is located below the *text editor*. Next, use the ⦿radio buttons to select: Subject Line; and select the tag [Job Title] from the drop-down.
>
> With these settings, this Job Seeker would receive an email that reads, “Thank you for applying for the Account Executive position…”.

Requisition Templates

KEY TOPICS:

- Work with the Requisition Template List
- Components of **Requisition Templates**
- Template Detail Tools
  - Edit an Existing Requisition Template
  - Delete an Existing Requisition Template
- Develop a New Requisition Template
  - Considerations by Requisition Tab

RELATED USER INSTRUCTIONS:

- Add a New Requisition
- Navigate the Requisition Detail

Administrator Tools for Developing Requisition Templates

Through system **Settings**, the **balanceTRAK** Administrator can manage a library of **Requisition Templates** to support users in building **Requisitions** in a quick and consistent manner. Templates are ideal for a family of Job Titles, i.e., positions that share such components as Forms, Approvals, Keywords, and Sources. (The Job Description will always be developed, separately from the Template.)

As described in this ar cle, the tabs (and tools) for developing a Requisition Template are very similar to those used when working with a "one-off" Requisio n. However, the client-side Administrator can control what Template components are editable by other users who add new Requisitions to the system.

Work with the Requisition Template List

Much like **balanceTRAK's** other, user-facing modules, the layout for **Requisition Templates** relies on a list/detail view: While a *column*, comprised of existing records, occupies the left side of the screen, a detail view for the highlighted Template appears in the right-hand window.

In the list *column*, information about existing Requisition Templates is organized into the following *columns*: Template (Name), Create Date, and an indicator for ✔ Active (or Inactive).

Components of Requisition Templates

Because an existing Requisition Template forms the basis for creating a new Requisition, Requisition Template, it will share the same building blocks (i.e., tabs):

- Fields
- Approvals (Approval Process
- Forms
- Keywords
- Sources
- Workflow

> ***Quick Reminder:*** The **Job Description** will be developed (or selected from the system's library) for each new Requisition, along with the associated Job Code/Title.

Template Detail Tools

Edit an Existing Requisition Template

Simply highlight a Requisition Template in the left *column*, and work through the Requisition Template detail by tab to review and make the necessary changes. Click the **[Save]** button at the bottom of the tab window if edits are made.

The updated template will be made available to users for selection when creating a new Requisition, during **Setup**.

Delete an Existing Requisition Template

Enter the Requisition Template detail, and view **Template Information**. Then, click the **[Delete]** button, and hold down the mouse click. This action will remove the Template from the *Add New Requisition* > **Setup** menu.

> ***Note:*** The editing or deletion of a Template will not impact any draft or existing Requisions.

Develop a New Requisition Template

> ***BEFORE YOU BEGIN:*** Please review the user instruc ons for adding a new Requisition; Although the Administrator-specific menus are briefly outlined here, information on these steps can be accessed from: Add a New Requisition.

Go to the top of the Requisition Template list, and click the **Add New** icon. A "blank" detail will display in the right-hand *window*:

- Begin with the **Template Information** tab, which displays on entry:
  - Enter a descriptive Template Name.
  - Turn on (or off) the status of: ☑ Active.
  - **[Save]** the tab, which will add the record to the top of the Requisio n Template list (in bold face).
- Proceed to addressing each tab, in order.

> ***Quick Tip For Multiple Locations:*** Requisition Templates can be named for location and/or function so that users recognize the appropriate templates (e.g., Columbus Drivers, Fairbanks Manufacturing).

Remember to **[Save]** each remaining tab before moving on to the next task area. Content areas that are not completed will be shown to other users as blank.

Considerations by Requisition Tab

While creating the Requisition Template, the Administrator can build components and manage how users will interact with each one:

- **All Tabs** — Make the element Editable AND/OR make it ✱ Required.
- **Forms** — Associate Form(s) from the system's library with the template, by Form type and whether the Form is External/Internal.
- **Keywords** — Develop RESUME Keywords that reflect critical Job Seeker qualifications.
- **Sources** — Link Manual Posting Sites, Integrated Job Boards, and Social Media sites to the Template.
- **Approvals** — Develop and save an Approval Process, including dragging-and-dropping Approvers in a simple process OR using the Advanced Designer.
- **Workflow** — Turn on a Job Seeker limit; and then, set the numeric threshold that stops the job posting from accepting further Job Seekers.
- **Posting Dates** — Choose from two options: Date Range OR Approval/Open Date. For the latter, set the job posting period by number of days.

Offer Templates

KEY TOPICS:

- How Offer Templates Work
- Create a New Offer Template
    - Upload a Word Document
    - Review Tags
    - Develop Signature Options
- Edit an Existing Offer Template
    - Make an Offer Template Inactive

Administer Offer Letter Templates for Communication with Job Seekers

How Offer Templates Work

While other communication templates in **balanceTRAK** rely on email, an Offer Template will look and act as an "official" correspondence on your company's letterhead. For security, the selected Job Seeker will log into his or her Profile to access and respond to the Offer letter.

The Offer Letter will have the following components:

- Corporate branding and contact information
- Message content
    - Tags to define personalization, or merge, information (e.g., Job Seeker Name, Start Date, Job Title)
- When sent to the Job Seeker, an accept/decline feature and a signature box for use by the Job Seeker

In **Settings > Offer Templates**, an Administrator can work with template components, such as uploading the source Word document, making a template inacv e (or active), including/deleting or editing tags, and previewing templates in a PDF viewer.

In a similar fashion to other **balanceTRAK** modules, the list of existing Offer Templates is located in the left-hand *column*, while a window is available on the right for working with a highlighted template.

This module supports the **Job Seekers** > Job Seeker detail > **Offers** tab.

Create a New Offer Template

Begin by adding the new template to the system: Click the **Add New** icon, located above the list *column*.

1. On the **Information** tab, enter a Template Name (for example, "Hourly Personnel Offer")
2. Retain the default check box to make the template: ☑ Active; or ☐ remove the check, and activate it later.

Press the **[Save]** button.

Then follow the steps below.

Upload a Word Document

Before working in the software, obtain a letterhead document in Word on your computer or network, or develop one. The letterhead should include both header/footer components and the message content.

Tags must also be predefined in this document (within double brackets), so the system can detect them on upload. Before doing so, open the template you saved above; navigate to the **Tags** tab, and review the list of Predefined Tags. In the Word document, format and type all of the tags needed, exactly as shown there.

Next, open the Offer Template you saved previously, and navigate to the **Edit** tab.

1. Click the **[Browse]** button, and locate the source document.
2. Click the **[Upload]** button.
3. Answer **[Yes]** or **[No]** to the following question: Would you like to specify signature tags from your uploaded document? (Signature options can be defined later, as described below.)

The Upload process will take you to **View** tab, where the letter will display in a PDF viewer.

Review Tags

The **Tags** tab will display the system's permitted tags (i.e., Predefined Tags) on the left, and the Detected Tags, as included in the uploaded document, to the right.

Develop Signature Opons

On the **Tags** tab, in the lower portion, the Signature Options menu shows drop-down options for including signature and date boxes for both the Job Seeker and the company representative.

After making selections, click the **[Save]** button.

Edit an Existing Offer Letter Template

An existing Offer Template can be modified to replace the Word document and edit tags, just like when the template was created. Please follow the instructions above.

Make an Offer Template Inactive

After selecting a Offer Template from the list *column*, the **Information** tab will display. Next to the Active tagline, ☐ remove the check from the box.

BalanceTRAK > Settings > Workflow

KEY TOPICS:

- Job Seeker Workflow Settings
  - Assign Job Seeker Stage after Application is Complete
  - Close the Requisition on Hire(s)
- Requisition Workflow Settigs
  - Restrict Requisition Closing
  - Assign Disposition Codes to Viewed Job Seekers
  - Assign a Disposition Code to Unviewed Job Seekers

System Settings for Workflow

The **balanceTRAK** Administrator can access **Settings** from the *side navigation menu* to review or change system **Workflow** settings for the client account. These settings support efforts to track applicants consistently by Job Seeker Stage and help ensure all Job Seekers are properly accounted for when a Requisi on is: Closed.

> ***For further assistance:*** If you have questions about **Settings**, please contact Berkshire's Product Support.

As outlined below, the **Workflow** *window* is divided into:

- Job Seeker Workflow

  AND

- Requisition Workflow

However, please review all of the administrative settings (below) because they are interrelated.

Job Seeker Workflow Settings

Assign Job Seeker Stage after Application is Complete

The first menu item turns on automation for assigning Job Seeker Stage at completion of the APPLICATION. This automaon can be applied globally or when an individual Requisition is being added or edited —

☑ Allow automatic assigning of job seeker stage after application completion.

If checked, a pair of radio buttons, with the following taglines, control how this setting is instituted:

⦿ Turn on for all Requisitions [Select the appropriate Job Seeker Stage from the drop-down]

OR

⦿ Set for individual requisitions (can be set when adding or editing a requisition)

Cross-reference: For more on applying this at the Requisition level, see on-line **Help** at: Set Workflow/Posting Dates.

Close the Requisition on Hire(s)

Complete the second menu to control what happens to the requisition when the number of hires meets or exceeds the number of jobs open:

⦿ Take no action (default)

OR

⦿ Close requisition automatically

Requisition Workflow Settings

The Requisition Workflow menu is divided into three segments, representing the following settings:

Restrict Requisition Closing

When the box is checked, this system setting prevents a Requisition from being put in the Closed Category until all Job Seekers who applied have Disposition Codes —

☑ Do not allow a user to change a requisition's category to Closed unless all job seekers are assigned a final disposition code

Assign Disposition Codes to Viewed Job Seekers

On Requisition close, the second menu turns on automatic dispositioning for viewed Job Seekers who are Not Dispositioned. When activated, drop-downs for selecting Disposition Codes by Stages will become active —

☑ To activate menu options, check the box next to the tagline: Assign the following disposition codes to any viewed job seekers without a final disposition code when closing a requisition.

Then, consider the best Disposition, by Job Seeker Stage, and make selections. (The Overall Disposition Code will be applied for each Stage lacking a selection.)

Assign a Disposition Code to Unviewed Job Seekers

The third menu turns on the automatic dispositioning of unviewed applicants who are Not Dispositioned, allows the assignment of a Disposition Code —

☑ Check the box next to the tagline: Assign the following disposition code to any unviewed job seekers without a final disposition code when closing a requision.

From the active drop-down, choose a: [Disposition Code].

If changes are made, press the **[Save]** button at the bottom of the page.

BalanceTRAK > Settings > Approval Process Templates

KEY TOPICS:

- Define an Approval Process
- Approval Process List Tools
  - Change the Approval Process Name
  - Edit an Approval Process
  - Delete an Approval Process
  - Display (Unhide) Inactive Approval Processes
  - Make an Active Approval Process Active or Inactive

Administrative Tools for the Approval Process List

As a foundation for facilitating formal approvals of Requisitions before a job opening is posted, one or more **Approval Process Templates** will have been defined, during software Implementation, and stored at: **Settings > Approval Processes**. Subsequently, the Administrator may edit current templates, add custom templates to the system, and activate/deactivate existing Approval Processes.

> ***Note:*** If you have questions about **Settings**, please contact your system Administrator or Berkshire's Product Support, as appropriate for your role and organization.

On the Approval Process list, entries will be designated with a check mark, if applicable, indicating:

- In Use (Associated with a prior or current Requisition or Job Seeker)
- Active (Available for use)

Approval Process List Tools

Change the Approval Process Name

From the Processes list, click on the Name entry; then: Enter a new name; and click **[Save]**.

Edit an Approval Process

Click the **Edit** icon for an Approval Process. The Approval Process detail opens, labeled in the *tab header* with the process: Name. After making the necessary changes, click **[Save]**.

> ***Important Note:*** An Approval Process that is In Use cannot be edited for existing steps or groups, but the process may be edited to add locations/departments/divisions (depending on language used) and approvers.

Delete an Approval Process

Select the ☑ check box next to a Name on the Processes list, and click the **[Delete Selected]** button.

> ***Note:*** While In Use, an Approval Process cannot be deleted.

Display (Unhide) Inactive Approval Processes

By default, the Processes list contains only active Approval Processes. To display all processes and a *column* indicating inactive or active status, ☑ check the box next to the upper-right tagline: Display Inactive Approval Processes.

Make an Active Approval Process Active or Inactive

A ✔ **Check mark** in the Active *column* indicates that users may employ the associated Approval Process.

To toggle an Approval Process between active and inactive system status, click on the ✔ **Check mark**. If the process is designated as inactive, the **Check mark** will be grayed out; and the process will not be displayed to users.

BalanceTRAK > Settings > Design an Approval Process

KEY TOPICS:

- About Developing Approval Process Templates
  - Before you Begin: Organizing Participants and Steps
- Develop an Approval Process Template
  - Choose Location Code(s) and Enter a Process Name
  - Design a Simple or Advanced Approval Process

RELATED USER TOPICS:

- Requisitions > Determine an Approval Process
- Submit a Job Seeker for Hiring Approval

Define Approval Processes and Manage the Template Library

BalanceTRAK's **Settings** allow an Administrator to define, manage, and store **Approval Process Templates** for:

- The opening of job Requisitions
- The hiring of Job Seekers

After an Approval Process for a Requisition (or a Job Seeker) is initiated, one or more selected Approvers (with user credentials) will receive both an email and a Dashboard notification. The email message will contain links that facilitate the review — and approval or disapproval by means of express or standard methods — of the Requisition (or Job Seeker).

> ***Note:*** If you have questions about system **Settings**, please contact your system Administrator or Berkshire's Product Support, as appropriate for your role and organization.

About Developing Approval Process Templates

While some organizations develop and implement simple Approval Processes, typically by Requisition, others may build more complex processes, relying on the system's Advanced Designer. Regardless of client size or number of locations, Approval Process Templates can be designed at the Administrative level and stored in the system's library so that other users can collaborate with each other to obtain approvals in a guided and consistent manner.

Before you Begin: Organizing Participants and Steps

By employing a simple drag-and-drop procedure, the **balanceTRAK** Administrator can design an Approval Process that includes:

- One Approver or multiple individual Approvers

  AND

- Any number of Approver Groups (Requiring one or all in the Group to approve)

  OR

- Steps, comprised of one or more Approvers and/or Approver Groups (Ideal for Approvals across departments)

For Organizations with Multiple Locations (and/or Departments) — By considering Location Codes, Approval Processes can be precisely tailored to the decision-making processes of your organization's business or functional units.

> ***Quick Tip:*** Location Codes represent your organization's hierarchy, from one-to-four levels.

Desvelop an Approval Process Template

The outline below describes how to define an Approval Process Template, from naming the Approval Process — and choosing a simple or Advanced Designer method — to saving the process as a template.

Choose Location Code(s) and Enter a Process Name

For both the simple and advanced Approval Process:

1. From the **Approvals** screen, select the **[Add New Approval Process Template]** button, located above the Approval Process Template list.
2. ☑ Check off the applicable Location Code(s), associated with the participating parties.

   Quick Tip: For a complex process, click: All. Conversely, clear multiple current selections by clicking: None.

3. In the provided field, enter a: Process Name.

   Quick Tip: Take into consideration whether a Requisition or a Job Seeker is being approved and how other users would identify it.

Proceed to creating a simple process or accessing the Advanced Designer, as described next.

Design a Simple or Advanced Approval Process

A. Use the Advanced Designer *(Optional)* —

1. The advanced Approval Process will be organized by Step, and then built by user name and/or Group (as described below). First, toggle the **Advanced Designer** switch, located above the Approvers list, to: On.
2. Click the **Add Step** icon to generate a drop box within the right-hand *working area*.
3. In the New step box, enter a Step name or number.

Although the *working area* will be a defined Step, continue with the steps below.

B. Create an Approval Group (and Add Users) —

1. Start by clicking the **Add Group** icon to display a *working area* in the right *column*. Enter a title for the Approval Group in the provided field.

2. Review the Approvers list in the left *column*, comprised of **balanceTRAK** users. Then, drag and drop each user you want to include into the work area.

3. Return to the Group *title bar* an select the radio button for:

   ⦿ Require One

   OR

   ⦿ Require All

Repeat as necessary to create one or more other Groups.

C. Add the Individual User(s) —

Simply drag and drop each user from the Approvers *column* to the right-hand *drop area*.

D. Place the Approvers and Groups in Order —

Once the individual and Group Approvers are in place, reorder the list by dragging and drop a corresponding pane to another location in the list.

E. Review and Save the Approval Process —

Next the Process Name, choose the **[Save Changes]** button.

Notification Event	A Message is Sent to the:
A balanceTRAK user initiates an approval request	• Identified approver (In a multi-person process, this only occurs during the specific approver's turn.)
When a process times out	• Approval request initiator
When an approver is skipped	• Skipped approver
When someone else approves	• As applicable, members of the same approval group
When an approver declines	• Approval request initiator
When a requisition is opened without being approved	• Requisition creator, when another user opens the Requisition before approvals are initiated or completed
When a job seeker is hired without being approved	• Users with permission to see the Job Seeker, when the "Hired" Disposition code is assigned before approvals are initiated or completed
When a final approval is completed	• Approval request initiator
When an approver cancels the process	• Approval request initiator
When a reminder is sent for an overdue response	• The overdue approver
When a process has been restarted	• Approval request initiator
At each process step	• **Approval request initiator**

Settings > Job Posting Page

KEY TOPICS:

- Select an Alias to Edit/Preview a Job Posting page
- Work with Job Posting and Global Job Description Elements
  - A. Theme, Style, and Content
  - B. Preview and Save the Page
- Restore Default Settings

Customize one or More Job Posting Pages

During software Implementation, Berkshire will have developed the initial content and appearance of your organization's Job Posting page(s) and set up the associated Alias(es). In some cases, external and internal pages are developed; in other cases, Job Posting pages may be developed by divisions or geographic units.

The client-side Administrator can manage basic formatting and content for these Job Posting page(s). If a customized Job Posting page is needed, please contact Berkshire's Product Support.

Select an Alias to Edit/Preview a Job Posting page

Access **Settings > Job Posting Page** to view the Select Alias menu for your organization, displaying a record for each existing Job Posting page, listed by Alias. Any Alias currently configured with default settings will have the tagline: *Default Settings*.

Select the Alias name from the list to edit (and preview) the associated Job Posting page. The full editing screen is comprised of a left *column*, containing editing tools, while the right window will contain the Live Preview.

Work with Job Posting and Global Job Description Elements

A. Theme, Style, and Content

In the left *column*, the Job Posting page's graphics, format, and "introductory" content can be addressed:

1. Review the current Theme Color. Use the color picker, or enter an HTML code, to change the color area, surrounding the Job Posting table.
2. If the logo displayed on the Job Posting page requires updating, move on to the Logo setting. Before uploading, make sure the image is properly formatted as JPEG, PNG, or BMP, having a maximum size of 5 megabytes. (A landscape-oriented logo, measuring between 300-to-400 pixels in width and having of a 3-to-3.5x width-to-height ratio, works well.) First, **[Remove]** the current logo; then, click the **[Browse]** button and bring in the new one.
3. The Date Posted information can be displayed with the job listings or hidden. Retain the default option to: Show, or toggle the drop-down to: Hide.

4. From the provided drop-down, select a Job Posting Style, either: Grid OR Block (includes Short Job Description teaser).

5. The next two editing windows contain content for the introductory paragraph(s) and the EEO/Pay Transparency Statement, respectively. Use the text editing tools and content windows to update content and its appearance, as needed.

6. Review the existing Job Posting table filters (to be made available to page viewers for honing in on key information). Make changes to one or more of the three provided drop-downs. (Filters may be left unassigned.)

The lower part of the menu *column* addresses the Job Description pages:

1. If desired, include or update a Social Share Image to accompany listings pushed there.

2. Next, change settings to include or remove an icon link to Facebook, LinkedIn, and/or Twitter, as desired.

3. If desired, include or update the link to a Video URL for display by default. (Accepted file types are Facebook Video, Vimeo, YouTube, FLV, MP4, and WEBM.)^

4. To push all job listings to Google Jobs, toggle the displayed switch on.

^ ❓ ***Cross-reference:*** To include a separate video in the Job Description by Job Code, see: Special Settings by Reference Table / *Job Code*.

B. Preview and Save the Page

The final step is to carefully review the Live Preview window.

> ***Quick Tip:*** The Live Preview will update as changes are made.

When the settings are satisfactory, click **[Save]**, before selecting the **[Back]** button to return to the Alias list.

Restore Default Settings

The Alias list will include a *column* to the right of the Alias name, containing a button for restoring system defaults. When settings for Job Posting page have been customized, the **[Use System Defaults]** button will display. Click this button to return the Job Posting page to its initial settings.

BalanceTRAK > Settings > System > Home page

BEFORE YOU BEGIN: Familiarize yourself with Dashboard Tiles and how the user will work with them, in on-line **Help** at: Home page Dashboard.

KEY TOPICS:

- Edit and Save the Default Layout
- Have the System Arrange the Layout (Optional)

Set up the Default Home page Dashboard for Users

While each **balanceTRAK** user can design the **Home** page Dashboard to suit his or her needs, the Administrator can predetermine a default layout that applies globally across the client account, at: **Settings > Home page**. Not only will new users see the default **Home** page on first Login, each one can return to the default configuration at any time.

Edit and Save the Default Layout

Navigate to the lower right, where the Dashboard *tool palette* is available. Click the **Edit** icon, a large round button that forms the *palette's* center. (This action also activates the *palette*, comprised of three other editing buttons.)

With the *tool palette* activated, click the **Add Widget** icon to maximize the Add Widget menu on the right-hand *column*. Review the provided options, and click on the *pane(s)* for the desired widget(s). When finished, click the **Close** icon, located in the *menu header*.

Have the System Arrange the Layout (Optional)

With the Dashboard *tool palette* activated, select the **[Calculate Optimal Layout]** button. The system will calculate an optimal layout, considering the size and orientation of each existing tile.

When the layout is complete, **Save** the layout to make the default **Home** page Dashboard available to users.

BalanceTRAK > Settings > System

KEY TOPICS:

System **Settings** for:

- Ineligibility
- Default User Settings
    - Revert to Default User Settings
    - Determine the Default Display for Job Seekers
    - Determine the Default Display for Requisitions
    - Set Time Zone
- Archive
- Application
- Requisition (Templates)
- Job Description
- Notification

System Settings

Available via **Settings** in the *side navigation menu*, the **System** module controls six areas of default **balanceTRAK** settings that will apply across the client Implementation. Each task area is represented on the System menu by tab, with labels that correspond to the first-level *Key Topics*, listed above.

When updating any of these settings, remember to **[Save]** the tab before exiting.

Ineligibility

For organizations that wish to mark those applicants who will be ineligible for applying to future job openings, the **Ineligibility** tab houses two tools:

1. A toggle switch that activates (or deactivates) the feature.
2. A menu with check boxes to identify the ineligible Job Seeker and drop-down options to assign Job Seeker Stage and Disposition.

Default User Settings

The **Default User Settings** tab presents options for reverting Account settings to default, initiating Notifications, determining the time zone, and choosing the module list filters.

Note: The individual user can later change the Default User Settings for page displays and notifications, by accessing **Account** tools from the *software header*.

Revert to Default User Settings

At the top of the screen, the box may be checked on the Default User Settings menu to: Revert all user account settings to the client default values.

Determine the Default Display for Job Seekers

The Manage Job Seekers menu controls the default filter for **Job Seekers**, on entry. The Job Seeker list can be displayed by the following drop-down options:

- All
- Recent
- Not Assigned
- Not Reviewed
- Internal
- Flagged

Determine the Default Display for Requisitions

The Manage Requisitions menu is used to control the default filter for **Requisitions**, on entry. The Requisition list can be filtered by Job Seeker Stage, depending on the Implementation. Some drop-down examples include:

- Awaiting Approval
- Pending Posting
- Accepting Applications
- Hiring Manager Review
- Interviewing
- Closed (Position Filled)
- Closed (Position not Filled)

Set Time Zone

The (U.S.) Time Zone is determined, based on drop-down options; and the provided box may be checked, if daylight savings time is observed. Several system activities (e.g., Calendar events/notifications, Job Seeker applied, Requisition History/Notes) will be time-stamped by the system, based on the selected Time Zone.

Application

The **Application** tab covers:

- Login Instructions for the Job Seeker
- The EEO Statement (for display on the Job Posting page, in the Job Description, and with the APPLICATION)

  AND

- An optional Kioske mode

The first menu at the top, Login Instructions, provides a long-text field, containing the current Login Instructions for display to the Job Seeker. The instructions may be edited. Next, the existing EEO Statement is displayed, which can also be edited in a long-text field.

> ***Quick Reminder:*** An attorney or an Affirmative Action expert should be consulted, regarding the content of your organization's **balanceTRAK** EEO Statement.

Finally, the **Kiosk Mode** can be toggled on (or off), so that users can apply on a "public" computer and be automatically logged out.

Requisition (Templates)

In support of Requisition management, the Administrator may require the Requisition creator to use a Requisition Template or an existing Requisition, and then select whether the first or both of those options will be required. This control is located on the **Settings > System > Requisition** tab. The options are:

- ☑ Require one of the following:
  - Requisition Template

    OR

  - Requisition Template or Previous Requisition

Job Description

On this final tab, the Administrator can manage whether a **Job Description** will be required when users create new Requisitions. With precise controls, a range of options is available, from the Job Description being entirely optional to a few or all Sections (e.g., Responsibilities/Duties) being required.

If all Sections are toggled off, the Job Description will not be required. When the setting for at least one Section is toggled on, a Job Description will be required, and then, the selected Section(s) must be populated. At the same time, other Sections can remain optional.

Notification

During Implementation, Berkshire will have set up a default set of delivery preferences for automatic notifications that will apply globally to the client's Account. Typically, just a few basic alerts will be turned on (e.g., a Job Seeker has applied, a

Requisition is closing). In addition, some reminders may be in place, such as alerts that remind a Requisition creator to post that job to manual Sources or social media.

Notifications can be delivered by:

- Email (to Outlook or other system)
- 🔔 Alert (to **balanceTRAK's** notification center Inbox)

Through comprehensive menus on the **Notification** tab, the client-side Administrator can configure a set of alerts to be received by all new users. From that starting point, the individual user can then personalize the Delivery Settings by user Account.

Determine Notification Settings

> ***Quick Tip:*** Notification options may be left unselected, so that each user can determine whether to receive 🔔 Event alerts, and when.

Using the Requisition, Job Seeker, and Approval Process menus, ☑ check off (or ☐ deselect) the appropriate items, using the Email and Alert *columns*.

Then, for high-volume events where shown, make a selection for Email Frequency, either:

- Immediately (individual listings)

  OR

- Daily (cumulative daily listings).

Click the **[Save]** button to apply the settings. The selections can be reverted to the default by clicking the **[Revert to Default]** button.

BalanceTRAK > Settings > System > Archive

KEY TOPICS

- About the Automatic Archiving Process
  - Default Archive Settings for Data Retention
  - How the Archiving Process Works
- Review and Customize Automatic Archive Settings
- Perform Archiving Tasks
  - Create an Archive at Any Time
  - Export an Archive File
  - What Information is Saved in the Archive File?
  - Delete an Archive

RELATED TOPIC:

- *Understanding Key Information in the BalanceTRAK Archive* (available in on-line **Help**)

Via **Settings > System** in the *side navigation bar*, an Administrator may access the **Archive Settings** tab to:

- Manage **Automatic Archive Settings** to control how automatic archiving is performed
- Work with **Archives** to perform "manual" archiving and export data

About the Automatic Archiving Process

To help keep your organization's data current and improve system load times, **balanceTRAK** employs default Automatic Archive Settings to collect, organize, and appropriately delete legacy Requisition and Job Seeker data at determined intervals.

Default Archive Settings for Data Retention

By default, a Closed Requisition and its associated Job Seeker information will display in the software for three years, or 36 months, after the Close Date. After an additional three months, or 90 days, the information will be deleted. If your organization is a Federal contractor, **balanceTRAK** default **Automatic Archive Settings** will meet Office of Federal Contract Compliance Programs (OFCCP) requirements for recordkeeping.

How the Archiving Process Works

1. When a Requisition's Status is changed to Closed, the system will generate a Close Date, starting the "clock" on the active data retention period in the software, typically three years.
2. When the active data retention data period is met, the data are now considered "legacy."
3. The system will run an annual archiving scan to collect the legacy data. The archived files will be available on the **Archives** tab for an additional time period, typically 90 days. During this time, an existing archive file can be exported for storage outside the system.

Note: If a Job Seeker is associated with both a legacy and an open Requisition, that Job Seeker's information will remain active in the system. If you are an Administrator and have questions regarding the archiving process or archived materials, please contact Berkshire's Product Support.

Review and Customize Automatic Archive Settings

To review the default settings or change them, first choose the **Archive** tab from the System menu's *tab header*. Then go to the **Automatic Archive Settings** sub-tab. The upper menu contains Automatic Creation and Deletion settings for archiving time intervals:

- Automatically create archive for data that is older than [Number of] months. (The default is: 36.)
- Archive data on [month/date] annually. (The default is: January 1.)
- Keep archives for [number of] days. (The default is: 90.)

⦿ Then, specify field to use for data archives:

- Requisition Closing Date (default) — This date is triggered when a Requisition Status, indicating Closed, is applied.
  OR
- Application Date

Click **[Save]** if any changes are made.

Perform Archiving Tasks

Proceed to **Archive** tab > **Archives** sub-tab. If any **Archives** have been established, those files will display. The list will inform you about each archive's:

- Create Date
- Archive Data up to (Date)
- Size
- Status
    - Completed [Within archive retention period]
    - Expired [Beyond the retention period)
- Type
    - Automatic
    - Manual

Create an Archive at Any Time

The archiving process may be performed at any time for Requisition-based data sets older than a year.

First, proceed to the Options menu. By default, a check box will be ticked to: ☑ Automatically remove data from **balanceTRAK** once the archive file has been created. ☐ Uncheck this box, as necessary.

> ***Important Caution:*** If the box is checked, the archived data cannot be restored to the system.

Next, enter a date that is at least one year prior to the current date. Then click the **[Create Archive]** button to initiate the process as a one-off activity. The newly created archive file will be added to the **Archives** list, labeled by:

- Archive Created (Date / time)
- Size
- Status

> ***Quick Tip:*** If the records contain a significant amount of data, choose **[Run in Background]** so you can continue working in other areas.

Export an Archive File

Export an existing archive on the **Archives** sub-tab by clicking the Date / time link. Then follow the Windows prompts to open and/or save the Zip file.

> ***Note:*** The Date / time link will be deactivated for Archives with the Status of: Expired.

What Information is Saved in the Archive File?

The archive's Zip file will contain the following elements:

- Requisition Information
    - Excel file, containing Requisition Information field entries by Requisition
    - CSV files, containing Requisition, Job Seeker History
    - PDFs of the Job Descriptions, labeled by Requisition

Quick Tip: The Requisition's Job Description can be exported prior to archiving by following these instructions: *Export a Job Description*.

- Job Seekers Information (by Requisition)
    - Excel file, containing Name, Email, Phone Number, Date Applied, Stage and Status for each Job Seeker
    - PDFs of all completed Forms
    - PDFs of submitted Resumes

Notes: Job Seeker information can be correlated by referencing the Job Seeker's sequential identifying number. Sensitive personally identifiable information (e.g., Social Security Number) will not be exported.

Delete an Archive

On the **Archives** sub-tab, click the ✖ **Delete** icon to the left of the archive entry. Then, confirm the deletion.

BalanceTRAK > System Tools > Client Settings

KEY TOPICS:

- How **Client Settings** Support the BalanceTRAK Experience
- Administrators: Get Additional Assistance for Client Settings

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How Client Settings support the ● BalanceTRAK Experience

Although **Client Settings**, as determined during the initial Implementation, may not be visible you, these settings operate behind the scenes to control system and database functions in critical ways. Accordingly, these settings are locked during Implementation to ensure proper system operation. **Client Settings** are involved in the following software operations, and more:

- Displaying content and activating features on the **Job Posting Page**
- Turning on and managing **Integrations**^ with job boards, Background Check providers, and Onboarding services
- Controlling the operation of **Requisitions**
  - Setting up a Requisition numbering system
  - Showing or hiding Requisition task areas
  - Determining Fields and their characteristics, including Field groups
  - When an Approval Process is not in place, moving new Requisitions into either Pending or Open
  - Locking Form questions to read-only (after a Requisition is approved or once a Job Seeker applies)
  - Allowing users to send Job Seeker information (and Forms) to others
- Controlling how **Forms** are displayed to Job Seekers
  - Allowing international formats for telephone and postal information
- Controlling how **Job Seekers** are displayed to software users
  - Securing the display of a Job Seeker's personal information
  - Managing the progression of Job Seeker Stages
  - Managing Administrator tools, including settings for handling duplicate records
- Managing system **Notifications**#
  - Allowing users to receive Forms as part of a relevant notification
  - For a Requisition undergoing an Approval Process, determining how much time should pass before an outstanding approval triggers an alert icon
- Determining defaults for user displays, settings, and time zone
  - Controlling user access

Administrators: Get Additional Assistance for Client Settings

If you have any questions about your current configuration or would like Berkshire to update settings or integrations, please contact us at product.support@berkshireassociates.com.

Or you may submit an on-line Product Support Request while logged into the software. Simply click the ❓**Help** button in the *page header*, and select Support.

Notes:

^Integration Options

BalanceTRAK integrates with the following job boards:

- America's Job Exchange
- Indeed.com (with free Indeed Apply and sponsored posting options)
- Careerbuilder.com
- Local Job Network
- Dice
- Monster
- us.jobs (free, formerly JOBCentral.com)
- ZipRecruiter (free and "boosted" posting options)
- Google Jobs (free)
- Jobfindah

#Options for Automatic System Notifications

While each user can determine how to receive system notifications under User Profile Settings, **Client Settings** control what initial, or default, settings are in place. The default options for sending notifications about system activities are to —

Notify users when:

- A requisition is closing. Sent at 7:00 AM Eastern Time.
- Someone applies for a job. If this option is selected, a further selection can be made to receive this type of notification:
    - On the day they apply at 10:00 PM Eastern Time

      OR
    - Immediately after they apply
- Someone completes a background check form.
- Notify me during each step of an approval process when I am a participating user.

BalanceTRAK > ⚙ > Profile Management

KEY TOPICS:

- What are Profiles and How are they used?
- About the **Profile Management** Layout
- Define a Custom Profile (and set Default)
  - Edit a Profile Name (or Change the Default)
  - Edit the Default Profile Status
  - Delete an Unassigned Profile
- *Sample Profile Settings*

Manage Software Permissions through Profiles

> ***Note:*** The functions described in this article are for users with Administrative-level permissions; these functions may not display or be editable in your environment. If you have questions regarding the functions available to you, please contact Berkshire's Product Support.

The ⚙ **Profile Management** module serves as the system's repository for software Profiles, which detail all of the possible roles users may have in ⬤ **balanceTRAK**. Profile options available in this module provide an Administrator granular control over understanding and granting user permissions. While the Profiles installed during Implementation are typically sufficient, the definitions for existing Profiles can be edited, and custom Profiles may be created.

Navigate to the **Profile Management** module by:

1. Clicking the ⚙ **System Tools** icon in the *software header*.
2. From the drop-down menu, selecting the **Security / Profile Management** link.

The **bTRAK** tab will display in the ⬤ **balanceWORKS** > Profile Management **environment.**

What are Profiles and How are they used?

Profiles in **balanceTRAK** control how groups of users, typically by role, have access to software functions and data, on a spectrum from no access to full permissions to enter a function and view, edit, and delete data.

A default Profile is assigned to every new user when the user is added to the system, typically indicating the user has no access. At that time or at a later date, the Administrator may change the initial assignment to one that reflects how the user will interact with **balanceTRAK**. Therefore, the Administrator should become familiar with the existing Profiles in the system, along with information contained in this article.

About the Profile Management Layout

> ***Example:*** The permissions to advance Job Seekers' Applicant Stage and Applicant Status can be applied independently. The HR Manager could be given permission to update either an Applicant Stage or Status. Meanwhile, HR Personnel could be restricted to viewing the Stage and updating the Status within that Stage.

Data Archiving, controls access to those functions by Profile. Typically, the Profile correlating to the System or Data Administrator will have permissions to work with Archive Settings, as shown by a checked box next to the tagline: ☑Enable this group of users full access to Data Archiving.

> ***Example:*** With regards to Applicant Disposition codes, HR personnel could be given Full Access to apply and edit all codes. In contrast, the Hiring Manager could be restricted to applying/editing codes related to the Interview, while being permitted to read codes applied by HR.

Define a Custom Profile (and set Default)

To add a Profile to the existing library, choose the **[Add]** button from the *upper toolbar*. On the Edit Profile menu, provide a name, and select a Default Access Level. ☑ Then, check off whether it will be the Default Profile (when a new user is added to balanceTRAK).

Click **[Save]**, which will add the Profile to the Profile drop-down.

> ***Note:*** Only one Profile can be the Default Profile.

Edit a Profile Name (or Change the Default)

To edit an existing Profile, select it from the upper drop-down, and click the **[Edit]** button. Update the Name entry.

To make the selected Profile the default when a new user is added, ☑ check the box for: Default Profile. The *upper toolbar* will also indicate the Default Profile by displaying a ☑ check mark.

Edit an Existing Profile

Select an existing Profile from the upper drop-down to display the current settings.

Navigate through the line items. Where necessary, click on the Access Level entry, and make a different selection from the provided drop-down. Click Save.

> ***Quick Tip:*** If the Access Level entry applies to all Profiles, select Apply to All.

Delete an Unassigned Profile

Profiles that are assigned to a **balanceTRAK** user cannot be deleted. However, a Profile that is not assigned to any user may be deleted. Select the Profile from the upper drop-down to display it, then select **[Delete]**.

Sample Profile Settings

Example A: The client-side Administrator wants to ensure that "Hiring Managers" (a Profile in the company's Implementation) send only authorized emails to Job Seekers. The Administrator would also like to make sure communications with Job Seekers are properly tracked. To check these settings:

1. From the **Profile Management** list, select the Profile for: Hiring Managers.

2. Navigate to the ⚙ **Administration** tab, and locate the line items for Email Templates and Email Settings.

3. For Email Templates, make sure only the box for ☑ View is checked.

4. For Email Settings, make sure only the box for ☑ View is checked.

5. If any changes are made to **Administration**, click the **[Save]** button.

6. Navigate to the **Job Seeker** tab, and check the Communication settings to ensure that "Hiring Managers" can communicate with applicants. Boxes to ☑ View, ☑ Add, and ☑ Edit should be checked, while ☐ Delete should remain unchecked.

7. Also on the **Job Seeker** tab, scroll down to the Functions *table*. The box for Email should be checked.

8. If any changes are made on the **Job Seeker** tab, click **[Save]**.

Example B: The Human Resources director wants to provide new permissions for "HR Staff" to add References to a Job Seeker's completed APPLICATION, but retain the limit on HR Staff to “view only” for the remainder of the Form. This user would:

1. From the **Profile Management** list, select the Profile for: HR Staff.

2. Activate the **Job Seeker** tab, and scroll down to the line item for Section. ▸ Expand the line item to show the detailed *table* menu.

3. For References, check the ☑ Edit box.

4. The ☐ Edit boxes for the remaining Sections should remain unchecked. (Only ☑ View should be checked for each Section.)

5. Remember to **[Save]** the changes before exiting the Profile.

BalanceTRAK > ⚙ > User Management

KEY TOPICS:

- How the **User Management** Module is Organized
- Settings for Location Access
- What Elements are Needed to Create a New User?
- Add a New User
- Activate (or Deactivate) an Existing User
- User List Tools
  - Filter the User List
    - Include Inactive Users
    - Clear an Existing Filter
- Search the User List
- Edit an Existing User's Record
  - Quickly Change the User's Profile
  - View whether Administration Privileges are Turned on

Administer User Credentials for BalanceTRAK

> ***Note:*** The functions described in this article are for users with Administrative-level permissions. If you have questions regarding the functions available to you, please contact Berkshire's Product Support.

The ⚙ **User Management** module houses a comprehensive User list, allowing the Administrator to review, update, and maintain user accounts for ● **balanceTRAK**. Your organization's software Implementation comes preloaded with accounts for an initial group of users. If you are an Administrator, you may add a new user or edit an existing user record.

To access the User list and the accompanying tools:

1. Click the ⚙ **System Tools** icon in the **balanceTRAK** *software header*.
2. From the drop-down menu, select the **Security / User Management** link.

How the User Management Module is Organized

The existing User list will appear in the left-hand *column*. By selecting a line item here, the Administrator can review details for the highlighted user in the right-hand *window*.

The User list, along with the **TRAK** detail view (as described below), will display in the ⬤ **balanceWORKS > User Management** environment.

Every user will have the following tabs in the detail view:

- **User Info** — The entry tab, containing Basic Information. (If the user is an Administrator, the tab will display activated permissions by software.)
- **Security** — A tab for the Administrator to require the user to: Change Password on Logon. This is applicable for a new user or to allow an existing user to reset his or her Password.
- **TRAK** — A software-specific tab, comprised of menus for editing the current access assignments. (For subscribers to multiple **balanceWORKS** applications, a tab will respresent each product.)

Quick Tip: While a Profile can be assigned to the user in **User Management**, the Profile's definition is controlled through: Profile Management.

What Elements are Needed to Create a New User?

The **balanceTRAK** user is defined by the following system entries:

- Creating the user in the system, based on identifying information (i.e., Email, First Name, Last Name)
- Activating the user
- Assigning a **balanceTRAK** Profile to the user (e.g., Hiring Manager)
- (If multiple Locations) Designating the user's access by organizational unit (e.g., Baltimore, Engineering)

Add a New User

From the *upper toolbar* in the left *column*, click the **[Add New]** button to open the **User Info** tab:

1. Enter the Email (address) to serve as the user’s login ID.

    Caution: Because the Email address identifies the user, only one user per email address can be added to the system.

2. Enter the user’s First Name, Last Name, and (optional) Phone Number/Extension.
3. The Active button will be toggled by default, but can be switched to off, if needed.
4. Toggle the Activation Email (at this time or later).

Click **[Add]** to append the User list with the new user.

Proceed to developing the user's record, as described in this article.

Deactivate (or Activate) an Existing User

As a critical setting, the **Active** toggle switch turns on (or turns off) the user's access to log into a **balanceTRAK** or another **balanceWORKS** application.

Accordingly, this setting is stored on the **User Info** tab for each user. Select the user from User list, navigate to the bottom of the Basic Information menu, and change the setting. Click the **[Save]** button to apply.

> ***Quick Tip:*** Deactivation may be the only setting allowed for your organization. It may also be the preferred setting over permanently deleting the user, particularly for Administrators who manage access for multiple **balanceWORKS** applications.

User List tools

Filter the User List

To review options and customize the User list view, click the **Change Filters** icon from the User list *header*.

Navigate to the **TRAK** tab. Then, check off one or more options from the Profiles and/or Locations menus. Apply the action by clicking the **[Apply Filter]** button, located in the *upper toolbar*.

> ***Quick Tip***: If your organization has numerous Locations, use bTRAK-specific Filters to reduce the display of access options.

Include Inactive Users

After choosing the **Change Filters** icon, check the box under the Options *header*, with the tagline: Show Inactive Users. Apply this option by pressing **[Apply Filter]**.

Clear an Existing Filter

A yellow *banner* at the top of the User list will indicated the Filter is in place. To restore the full User list, click the banner's Clear Filter link.

Search the Users List

Particularly beneficial for organizations with large numbers of users, a **Search** bar is located in the User list's *upper toolbar*. Simply enter part of an Email (address), First Name, or Last Name to return one or more results.

Restore the full User list by returning to the **Search** bar and pressing the **Delete** icon.

Edit an Existing User's Records

Quickly Change the User's Profile

By user, the assigned Profile is indicated on the **TRAK** tab in the *secondary header*. Simply expand the provided drop-down, choose another Profile, and **[Save]** the assignment.

View whether Administration Privileges are Turned on

By user, the client-side Administrator can review whether Administration privileges are currently turned on (or off) by Berkshire. This setting is located in the user's **User Info** tab, in the right-hand *column*.

BalanceTRAK / Settings for Location Access

RETURN TO: User Management

Before learning about access by organizational unit, please familiarize yourself with the article linked above.

KEY TOPICS:

- Update the User's Location Access
    - Add a Location to the User's Account
    - Delete a Location from the User's Account
    - Quickly Remove All Location Access for the User

Manage Access for Multiple Organizational Units

> ***Note:*** The functions described in this article are for users with Administrative-level permissions; these functions may not display or be editable in your environment. If you have questions regarding the functions available to you, please contact Berkshire's Product Support.

If your organization has multiple establishments or functional units, user access to **balanceTRAK** data can be controlled by Location code. Alongside user credentials and assigned software Profiles, Location codes control what users can see and edit. (For organizations with multiple Job Posting pages, Location codes also tie each unit's Requisitions to the proper Job Posting page.)

While working in **System Tools > User Management**, Location settings will be integral to editing user accounts and managing users in your environment.

Location codes, specific to your environment, were determined during software Implementation, for up to four levels in an organizational hierarchy (e.g., Location, Division, Subsidiary).

> ***Cross-reference:*** In support of system operation, a Location Code Data table is stored at: **Settings > Reference Tables**. For information, see: Special Settings by Reference Table / *Location Code*.

Update the User's Location Access

On the user's **TRAK** tab, the available options for Location Access are housed in the left-hand menu. To the right, a *column* displays any Current Locations that are currently applied to the selected user.

After highlighting the user on the User List, the Administrator can perform the following actions via the user's **TRAK** tab:

Add a Location to the User's Account

Check off one or more options in the left-hand Add Location menu; then press the **[Save]** button. The selected unit(s) will

Add a Location to the User's Account

Check off one or more options in the left-hand Add Location menu; then press the **[Save]** button. The selected unit(s) will move to the right-hand *column*, under: Current Locations.

Delete an Existing Location from the User's Account

Find the Current Location in the right-hand *column*; then select the corresponding 🗑 **Remove** icon.

Quickly Remove All Location Access for the User

For the highlighted user with existing access, simply click **[Remove All Access]**, a button positioned under the Current Locations *header*.

BalanceTRAK > Email Settings

KEY TOPICS:

- Delivery Options
- Automatic Email Options
- Job Seekers (Options)

Related **balanceTRAK** ⚙ **Settings**:

- Email Templates

Email Settings for BalanceTRAK Communication

> ***Note:*** The functions described below are for users with Administrative-level permissions; these settings may not display or be editable in your organization's software Implementation. If you have questions regarding the functions available to you, please contact Berkshire's Product Support.

Accessed from the *page header* through under ⚙ **System Tools**, **Email Settings** control how email messages are sent from your organization's ● **balanceTRAK** users to:

- Job Seekers
- Other **balanceTRAK** colleagues

  AND

- External recipients, as applicable

Email messages sent from the system are logged in the corresponding Requisition detail, on the **History** tab. Job Seekers and external recipients may respond to the email messages they receive, and the **balanceTRAK** user can review the responses in the Notification Center, accessible from the *page header*.

Delivery Options

A client-specific email address will appear in the text box, associated with the tagline: Emails Generated by **balanceTRAK** will be sent from the following Email Address. This entry serves as the system's email address.

How "Sent From" Appears to Recipients

Notification emails for such activities as Approval Processes are sent from a system mailbox: "balanceTRAK@berkshireassociates.com".

An email will display as "sent from" the user's email address (entered at log in) for the following message types:

- Transmitting a Job Seeker's information to others
- Sending an email to a Job Seeker (e.g., Response Letter, SELF-ID Form)

For users with Outlook, the default setting is to send user-initiated messages from the system and the sender. The box will be checked next to the tagline: ☑ Deliver Email on Behalf of the Sender. Recipients will be able to reply to the sender.

> ***Example:*** "From: balanceTRAK@berkshireassociates.com on behalf of hr@companyname.com".

A check box option is also available to: ☑ Use the above [system] email address when manually sending emails. When this setting is in place, will the sender's email address will not display to the recipient.

Maximum Email Size

A numerical number will display, in megabytes. The default entry is: 20.

Automatic Email Options

Automatically Send Email Acknowledgements

BalanceTRAK users may be permitted to send an acknowledgement email to a Job Seeker on submission of a PRESCREENER or APPLICATION form. If this option has been implemented, the box will be checked for: ☑ Automatically Send Acknowledgement Letter. An Email Template will have also been selected.

Response Triggers and Delay Periods

☑ By checking the box for one or more of the following settings, the system will:

- Automatically send a response email when an applicant status is automatically assigned during the Prescreener Form.
- Automatically send a response email when an applicant status is manually assigned by a user.
- Send automatic response emails after the following time period. (An Email Delay period can range from 1 to 72 hours.)

Job Seekers (Options)

Allow Users to Send Job Seeker Information

The box may be checked to: ☑ Allow sending job seekers and their resumes to others.

The **balanceTRAK** user can then send a Job Seeker's information to internal and/or external email addressees.

Send Form to Users who "Opt in" to Notifications

☑ One more boxes may be checked so that users receive completed applicant Forms, if they have elected to receive Notifications:

- Resume
- Cover Letter
- Prescreener
- Application

BalanceTRAK > ⚙ > Client Usage Report

KEY TOPIC:

- Filter Options for the **Client Usage Report**
- Export System Report

Run Administrative Reports on System Activities

For the user with Administrative-level permissions, access to ● **balanceTRAK** system reporting is available at: ⚙ > Client Usage Report**.**

Filter Options for the Client Usage Report

⊙ Reports can be displayed by:

- HTML
- PDF

A report can be run for:

- **Requisition Count —** By Job Title/Requisition Number, Posting Date, # of Job Seekers, Total # of Requisitions
- **Job Seeker Count —** By Name, Email Address, Phone Number, Application Date, Total # of Job Seekers
- **User Count —** By User, Last Login Date, # of Logins, Total # of Users

Under Report Settings, a filter can be set to limit a report by Posting Start Date and Posting End Date (two-digit month, two-digit date, four-digit year, separated by slashes).

The report filter can also be based on:

- [Business unit]

Export System Reports

An **[Export]** button is available to use the report data, in PDF, outside of **balanceTRAK**.