Compiled HELP Documentation

Version 3.9

BERKSHIRE ASSOCIATES INC.
Your Partner in Human Resources and Affirmative Action

BALANCE*trak* Table of Contents

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

BALANCEtrak Overview and Navigation

Introduction to BALANCE*trak*

From posting a job opening (on a branded Website page and major career sites) to ultimately hiring the most-qualified candidate, **BALANCE*trak*** supports the recruiting process. As a software user engaged in this process, you may belong to one of the following audiences:

- **Human Resource (HR) professionals** who manage or coordinate recruiting and/or hiring
- **Hiring managers or other collaborators** who participate in, or make decisions about, hiring
- **Data specialists** who develop compliance or voluntary reporting on HR activities

Implementation

During the initial Implementation, the applicant workflow in **BALANCE*trak*** was determined, based on a collaboration between your organization and Berkshire's Product Support team. Typically, your organization will have a designated Administrator. At that time, permissions for your access to, and work in, **BALANCE*trak*** functions will have been determined.

Modules

In organizing both job openings and applicant information, the software relies on two modules *(Figure 1)*,accordingly:

- **Requisitions** (Job openings, or postings)
- **Job Seekers** (Applicants, or job candidates)

In support of the above efforts, **Reports** can be run to track statistics.

If you are an Administrator, **Administrative Settings** (and **System Tools**) allow you to review or update components in the BALANCE*trak* workflow.

Side Navigation Menu

Available from the left side on every page, the *side navigation menu (Figure 1)* offers easy access to the BALANCE*trak* task areas, which have been introduced in this article.

Data Search

Modules for **Home**, **Requisitions**, and **Job Seekers** display a global **[Search]** tool in the *page header (Figure 1).* Enter a complete search-term to return the best results. Multiple results will be organized in the categories of Job Seekers and Requisitions, as applicable.

Click the **[Clear Search]** icon to restore the full display. A module-specific **Search** is also available within **Administrative Settings**.

Figure 1: **BALANCE*trak* header and side navigation menu**

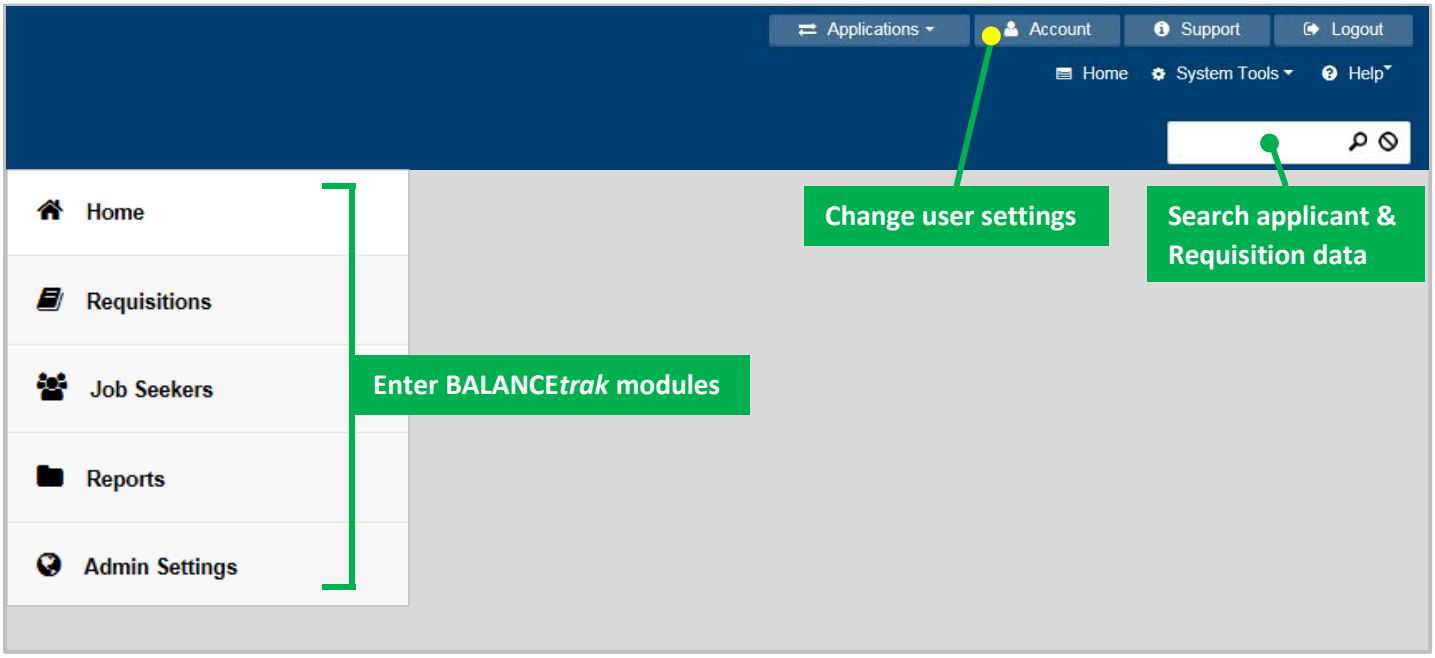
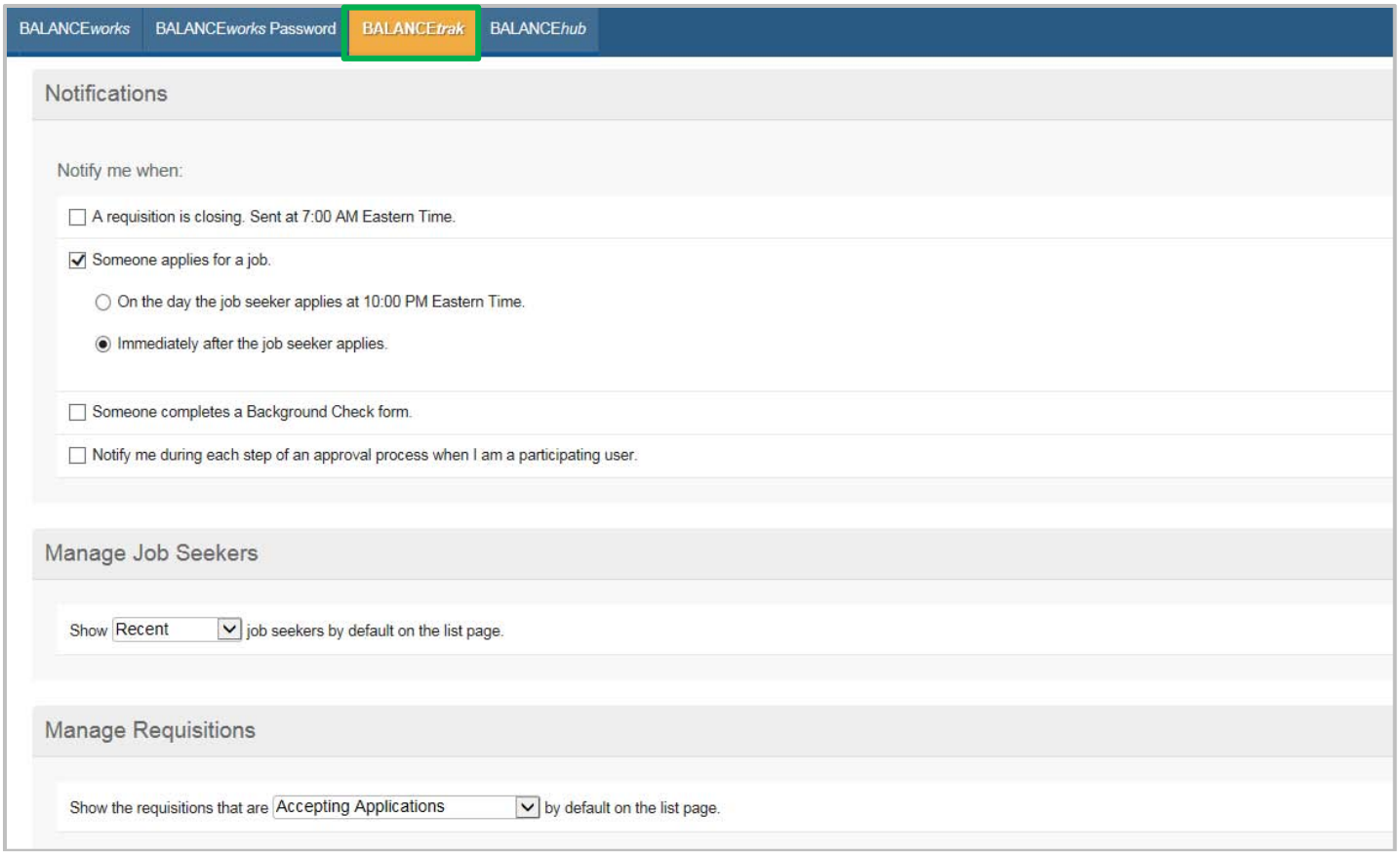


Figure 2: **Account menus for Notifications and default screen views**



BALANCEtrak (User) Account Settings

KEY TOPICS:

- Set Preferences for Automatic Notifications
- Change the Default Page Displays
- Change the Default Time Zone

RELATED TOPIC:

- BALANCE*works* Account Settings *(see on-line* **Help**)

Customize Settings by User Account

Select the **Account** button from the *software header,* which will open: **Manage Account Settings.** To begin, make sure the **BALANCE*trak*** tab is active. If any changes are made to the settings, as described below, click **[Save]** to apply them *(Figure 2).*

Set Preferences for Automatic Notifications

On the **BALANCE*trak*** tab / Notifications menu, check off the appropriate settings to individualize the receipt of system notifications:

- A requisition is closing. (Sent at 7:00 am Eastern Time.)
- Someone applies for a job. If this option is checked, choose one of the following:
    - On the day the job seeker applies at 10:00 pm Eastern Time.
    - Immediately after the job seeker applies.

      Quick Tip: Consider how many job applications your organization receives. For a small organization (or a recruiter who must address every application), notification by Job Seeker event may be appropriate. For a large organization, a daily message at 10:00 pm ET, listing all new Job Seekers, may be preferable.
- Someone completes a Background Check form.
- Notify me during each step of the approval process when I am a participating user.

Change the Default Screen Displays

Navigate to the Manage Job Seekers menu, which controls the default view of the **Job Seekers** page. The Job Seekers list can be displayed by:

- All
- Recent
- Not Assigned
- Internal
- Flagged

Navigate to the Manage Requisitions menu to set the default view of the **Requisitions** page. The default view is based on Requisitions Status, depending on your BALANCE*trak* Implementation. Some typical Status options include:

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

Change the Default Time Zone

To change the U.S. Time Zone used by the system, choose another from the provided drop-down at the bottom of the page (e.g., Central, Pacific). You may also check or uncheck whether the system relies on daylight savings time.

> ***Quick Tip:*** Make sure the proper Time Zone is in place, so **Calendar** events and related notifications will be time-stamped appropriately.

BALANCEtrak > Home Page and Tools

KEY TOPICS:

- Dashboard Notifications
    - Requisitions Needing Approval
    - Job Seekers Needing Approval
- Saved Views List
- Dashboard Objects

Home Page Basics

Dashboard Notifications

Requisitions Needing Approval

If you are an approver for **wŜIjdzlǎǔ2yã** — and a Requisition requires your approval — an *alert banner* will display at the top of the **I2YŜ** page Dashboard. This reminder will list the Requisition by:

- Requisition Number
- Job Code
- Job Title

Click the **[Review]** icon associated with the Requisition to display the corresponding Review Requisition detail. A notification *message* will also appear at the top of the screen when the detail is displayed.

- within the message, click the link: See approval section below

  OR

- Scroll down to the Approval Process menu

Choose to **[Approve]** or **[Not Approve]** the Requisition. You can also enter: Comments.

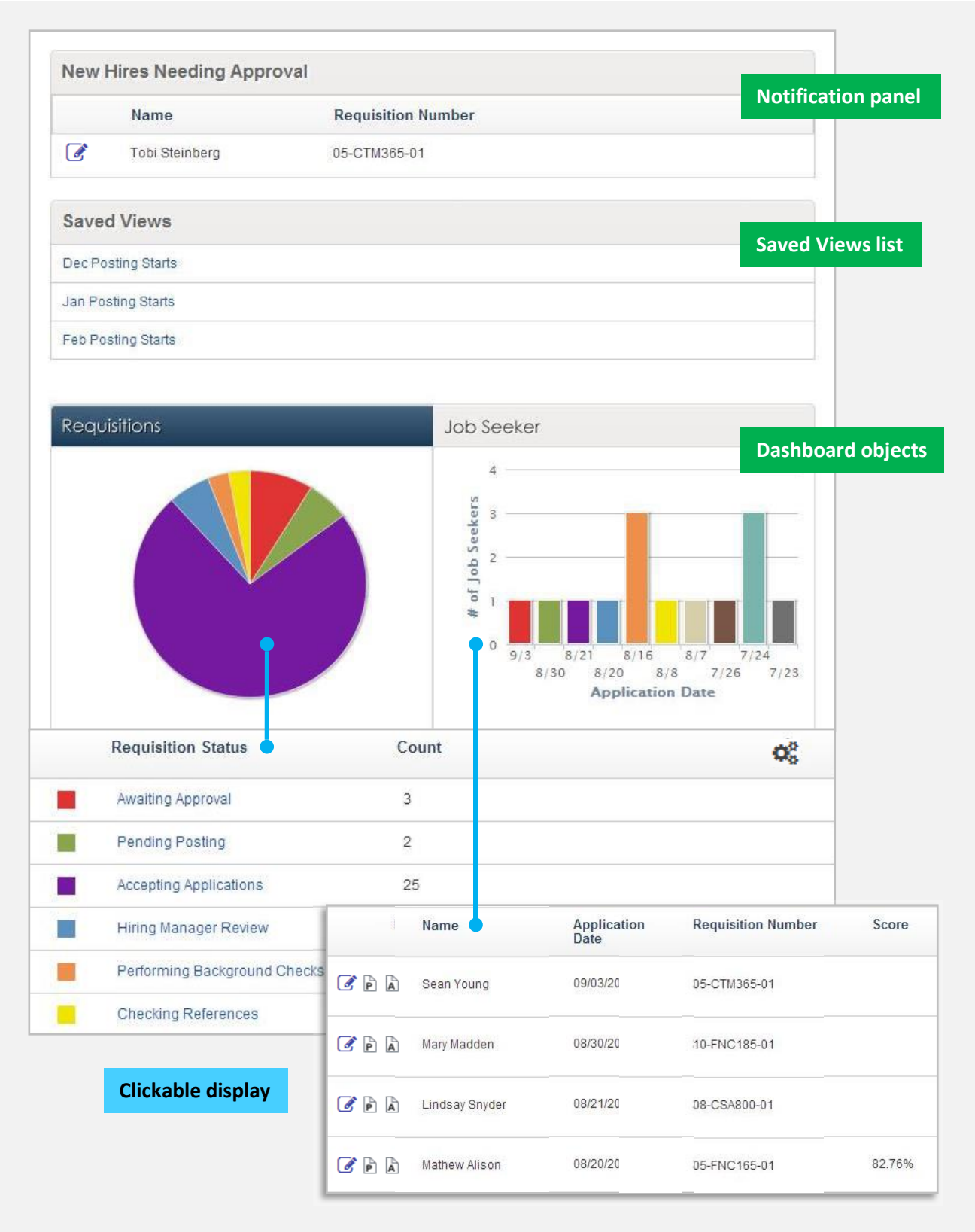
Job Seekers Needing Approval

If one or more **Job Seekers** requireapproval for hiring, a *banner* will display at the top of the Dashboard, entitled: New Hires Needing Approval *(Figure 3)*. Click the **[Review]** icon for a par ticular Job Seeker to display the Review Job Seeker Using the Approval Process menu, select either: **[Approve]** or **[Not Approve]** and optionally, enter: Comments.

Saved Views List

If you have filtered the **Requisitions** or **Job Seekers** list — and saved the results as a customized view — the Dashboard's Saved Views *banner (Figure 3)* provides quick access to the fltered view.

Figure 3: **Home page notifications and Dashboard objects**



BALANCEtrak > Dashboard Objects

KEY TOPICS:

- Pie Chart: (View Current) Requisitions
- Graph: (View Recent) Job Seekers
- Calendar: View Upcoming Events

Gain Insight through Dashboard Objects

The **Home** page Dashboard contains two graphical objects, each representing information about **Requisitions** and **Job Seekers**, respectively *(Figure 3)*. Below these two objects, a **Calendar** helps you stay on top of Events as applicants move through the consideration process.

Pie Chart: (View Current) Requisitions

By default, the **Requisitions** object is active on the Dashboard. If the **Requisitions** object is not active, click the *object header*. A pie chart displays, showing Requisitions by status. Hover over a portion of the pie chart with your mouse to view the corresponding status label, along with the percentage of Requisitions currently assigned to that status.

A legend below the pie chart will indicate each Requisition Status, the corresponding color code, and a Count of Requisitions with the particular Status. Click a Requisition Status link to view a **Requisitions** list, filtered to that status.

Graph: (View Recent Job) Seekers

Click the **Job Seekers** *object header* to activate this object. A bar chart will show the # (number) of Job Seekers by Application Date for the previous ten days. Hover your mouse over a bar in the chart to view the corresponding numerical count.

Below the chart, a list of the ten most recent Job Seekers will display. Click the **[Review]** icon to review a Job Seeker's information. Click the **[Resume]** icon to view the associated resume document. Click the More link at the bottom of the list to view the **Job Seekers** page.

Calendar: View Upcoming Events

Once added, the graphical **Calendar** displays Events by month. Titles for the scheduled Events will also display to the right of the graphical display. If an Event was created in a Review Job Seeker's detail, it is labeled with the Job Seeker's name. An Event created in the Review Requisitionn detail is labeled with the Requisition Number.

Click on a [date in bold red] to display the associated Event title; use the browser's **[Refresh]** button to again display the full Event list. At the far right of each title is **[Reminder]** icon for sending an appointment to each participant's Outlook calendar or saving the Event as a calendar file (.ICS).

Use the **[Scrolling arrows]** to view earlier or later months on the **Calendar**.

Add a Requisition

KEY TOPICS:

- How Requisitions are Numbered
- Add a Requisition
    - Helpful Tips for Creating the Requisition
    - About the Default Form(s) and Requisitions
- Add Multiple Requisitions

NEXT STEPS:

- Requisition Information Menu, Toolbar, and Status
- Build the Requisition

Add one or Multiple Requisitions to the System

Choose **Requisitions** from the *side navigation menu* to add one or more Requisitions to the system. Once the Requisition is added, its content can be developed, as described in the *Next Steps* linked above.

How Requisitions are Numbered

Typically, **BALANCE*trak*** is configured to automatically number Requisitions, but your Implementation may allow numbers to be added by the Requisition creator. If so, a required field for Requisition Number will display in the Add Requisition menu (which is described below under: *Add a Requisition*).

Add a Requisition

Click **[Add]** in the *toolbar* to open the Add Requisition menu. Enter the information for each required (and optional) Requisition field, and click **[Save]**.

Helpful Tips for Creating the Requisition

At the time a Requisition is added to the system, basic identifying information will be entered into the Requisition's data fields.

> ***Note:*** The particular fields will be configured and labeled, based on your organization's terminology and applicant workflow.

- **Required Fields —** As marked with an asterisk, typical required fields include: Type of Position. [Business unit] Code, Job Code, Location, and Posting Start Date. Other fields may also be required.

- **Posting Start Date —** Select the date that Applications will be accepted for the Requisition.
- **Recruiter —** Specify by numeric or text entry.
- **Cap Job Seekers —** If configured, enter a number for: Maximum Number of Job Seekers. Then, from the provided drop-down, choose a Requisition status to be triggered by the cap.
- **Job Seeker Filter Settings —**
    - Show All
    - Must Complete One Form (A Job Seeker will not be shown in the system until at least one form, PRESCREENER or APPLICATION, is completed.)
    - Must Complete Application (A Job Seeker will not be shown until the APPLICATION is completed.)
- **Add Job Code —** (Users with appropriate permissions) If the Job Code drop-down is not sufficient, click the Add New Job Code link. The new Job Code will be inserted into the system's Job Code Reference table, one of the system's Reference Tables, so that it will be available when adding a future Requisition.

If you have no additional Requisitions to add, click **[Save]**. The system will display the Review Requisition detail, which is comprised of menus for building the Requisition you just created. See: Build the Requisition. The Requisition is also added to the **Requisitions** list.

The instructions for adding multiple Requisitions are included below.

About the Default Form(s) and Requisitions

For most Implementations, a default PRESCREENER or APPLICATION Form will be included when a new Requisition is created. The system may also automatically include a default PRESCREENER or APPLICATION that has been previously associated with the Requisition's Job Code/Title.

> ***Note:*** In some Implementations, a PRESCREENER will be used to reduce the applicant pool to only those meeting basic, minimum qualifications.

Cross references:

- Forms can be added, see: Build the Requisition / *Add a Form to a Requisition*.
- If you are an Administrator, **Administrative Settings** for Form Templates accomplish the Requisition-Form linkage.

Add Multiple Requisitions

Click **[Save and Add]** when saving the first Requisition. This will open the Add Requisition menu for the next Requisition. When finished, select **[Save]**, or continue with **[Save and Add]**. If multiple Requisitions were added, the Review Requisition detail will open for most recently saved Requisition.

To develop content for any of the other new Requisitions, select **Requisitions** from the *side navigation menu*, and open the Review Requisition detail.

Requisition List Tools

KEY TOPICS:

- View the Requisitions List
  - View Requisitions by Status
  - Set the Default Requisitions View Option
  - Add Optional Fields for the Requisitions List
  - Set the Number of Records per Page
- Simple Filter and Sort Options for the Requisitions List
  - Filter the Requisitions List
  - Sort Requisition Records
- Requisition Tools
  - Review a Requisition
  - Delete a Requisition

View, Filter, and Sort the Requisitions List

After selecting **Requisitions** from the *side navigation menu*, the corresponding **Requisitions** tab will display. Two supporting task areas — **Customize View** and **Export Requisitions** — are available from the *tab header.*

View the Requisitions List

The **Requisitions** tab houses a list of your organization's job postings, organized by identifying information, as described below.

View Requisitions by Status

The **Requisitions** list will display Requisitions, based on the Status selection made in the upper drop-down menu. Some typical statuses may include:

- Accepting Applications
- Pending
- Awaiting Approval
- Internal Postings
- Interview Scheduled

- Hiring Manager Review
- Closed (Filled or Not Filled)

Or you may select: All.

The **Requisitions** list then shows existing Requisitions by:

- Requisition Number
- [Business Unit] Code
- Job Title/Job Code
- # of Job Seekers

> ***Quick Tip:*** Click the entry in the # of Job Seekers *column* to view the Job Seekers associated with a Requisition.

Set the Default Requisitions View Option

Access the **[Account]** button from the *software header*. Choose the **BALANCE*works*** tab, and navigate to the Manage Requisitions menu. In the Show requisitions… drop-down, select one of the provided options. Click the **[Save]** button at the bottom of the page.

Add Optional Fields for the Requisitions List

To add optional fields to the Requisitions list table, click **[Change Fields]** on the *toolbar*. Using available checkboxes in the pre-populated drop-down, select one or more fields (such as Status or Salary Range). Choose **[Save]** to return to the reconfigured list. To view the additional fields, you may have to scroll the page to the right-hand side.

> ***Note:*** Any optional fields set for the list will be cleared when the **[Clear Search]** button is selected.

Set the Number of Records per Page

By default, 20 Requisitions are displayed per page. Change this default by accessing **[Account]** from the *software header*. Select the **BALANCE*works*** tab, and change the numerical entry for: Records Per Page.

Simple Filter and Sort Options for the Requisitions List

> ***Quick Reminder:*** To save and quickly reapply a View, open the **Customize View** tab.

Filter the Requisitions List

Filter the **Requisitions** list by clicking the **[Search]** icon in the *column header*. If a **[Search]** icon is not visible for the *column header*, a filter by that type of information is not available.

In the pop-up window, select or enter the filter value(s). Click **[Save]** to apply the filter. Once a filter is set for a *column*, the **[Search]** icon is outlined in red. A yellow *banner* appears, with buttons to:

- **[View Search] —** Opens the **Customize View** tab (described above).
- **[Clear Search] —** Restores the default view.

Sort Requisition Records

Click on the ↓A/Z **[Sort]** icon, located at the top left of the *table header*. From the Sort *toolbar*, select one of the following *column buttons*:

- Requisition Number
- Business Unit Code
- Job Title/Job Code
- # of Job Seekers

A sort in ascending order is indicated by a ▼ **[Down Arrow]**, adjacent to the *column label*. Click the button again, and an ▲ **[Up Arrow]** indicates a sort in descending order. Click the button a third time to clear the sort; if no sort is applied, both up and down arrows will display.

Add additional levels to the sort by clicking on additional **[Sort]** buttons.

Requisition Tools

Review a Requisition

The ✎ **[Review]** icon provides access to the Review Requisition detail for a Requisition. While in the record, you can:

- Develop job posting content
- Apply Requisition Status
- Update Requisition information
- Post to Career page and external Sources
- Review Job Seekers who have applied

Cross-references:

- Requisition Information Menu, Toolbar, and Status
- Build the Requisition

Delete a Requisition

Select a Requisition, by clicking the ☑ check box to the left of the Requisition Number. Then choose **[Delete Selected]** from the *upper toolbar*.

Requisition Information Menu, Toolbar, and Status

BEGIN HERE:

- Add a Requisition

KEY TOPICS:

- Overview of the Requisition Information Toolbar
  - Edit Information
  - Send Email to Colleagues
  - Copy Requisition
- Assign Requisition Status
  - Post the Job Listing to the Company Career Page
- View the Job Seekers List, Filtered by the Requisition

NEXT STEPS:

- Build the Requisition
- Review Job Seekers who have Applied

Work with the Requisition Information Menu

Once the Requisition has been added to the **Requisitions** list, click the corresponding **[Review]** icon to enter the Review Requisition detail. Here, you will find the top menu is comprised of key Requisition Information, including:

- Information, entered when the Requisitions was added
- *Header toolbar* icons, offering quick links to key actions *(Figure 4)*

Overview of the Requisition Information Toolbar

Edit Information

The Edit Requisition Information menu will display. Update the entries, as necessary, and click **[Save]** if changes are made.

Send Email to Colleagues

The Send Mail menu opens. Compose an email; select recipients (from a menu of BALANCE*trak* users); and **[Preview and Send]** the message.

Copy Requisition

Options will display to copy some (or all) aspects of an existing Requisition when creating a new one.

From the current Requisition, you may copy:

- [Business unit] Code
- Job Code
- (Requisition) Status

The menus will also display other options that are available in the system or from other Requisitions. Make a new selection, as needed, to build the new Requisition, appropriately.

☑ Then select whether to also copy the Job Seekers, and their statuses, to the new Requisition. Finally, click **[Copy]**.

Assign (or Update) Requisition Status

If Requisition Status has been made available for revision, the current Status entry will appear as a link. When the current [Status entry] is selected, a menu of other Status options will appear. Assign a different Status, and click **[Save]** to apply the change. Because the Status entry will trigger certain tools to become available within the system, ensure that it is set accurately to your applicant workflow.

> ***Quick Tip:*** For cumulative totals of Requisitions by Status, view the **Requisitions** graph and accompanying table on the **Home** page Dashboard.
>
> ***Note:*** The System Administrator may prevent a Requisition from being Closed until all Job Seekers who have applied are assigned a final Disposition code.

Post the Job Listing to the Company Career Page

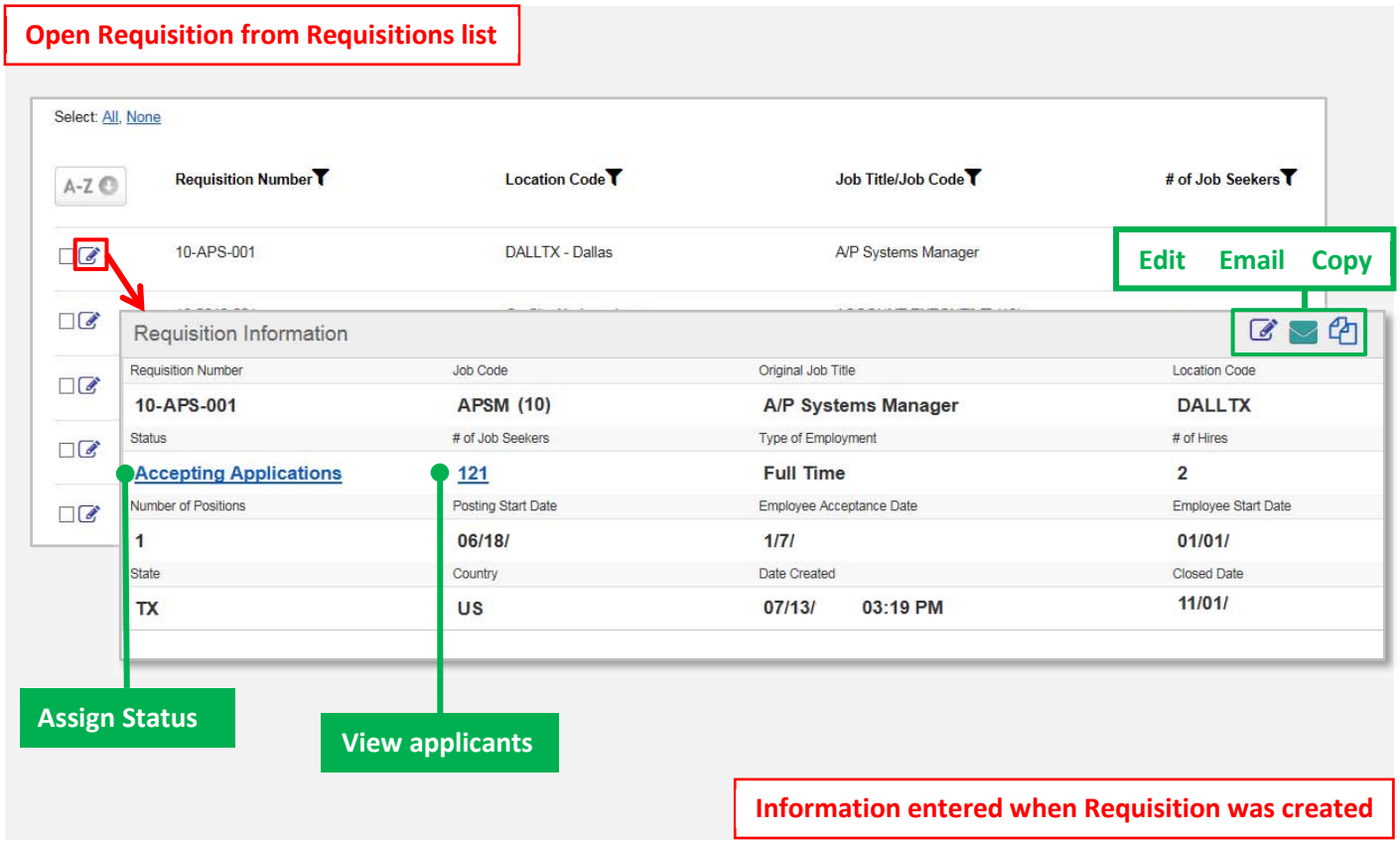
By default, a Job Posting page goes live when the Status of Accepting Applications is displayed, and the Requisition has at least one Form assigned.

> ***Important Caution:*** If a Requisition has not been approved in the system, and the user attempts to change the Status to one indicating approval, a warning message will appear. Click **[OK]** to verify the change, or **[Cancel]** it.

View the Job Seekers List, Filtered by the Requisition

Click the [Numerical entry] under: # of Job Seekers. The **Job Seekers** list will be limited to those who applied to the Requisition.

Figure 4: **Requisition Information menu and toolbar**



Build the Requisition

BEGIN HERE:

- Add a Requisition
- Requisition Information Menu, Toolbar, and Status

KEY TOPICS:

- Use the Forms Menu
  - Overview of the Forms List
  - Add a Form to a Requisition
  - Assign Separate Forms for Internal and External Applicants
  - Set the Default Application
  - Edit the Job Posting Form Options
- Job Description Tools
  - Create a Job Description
  - Preview the Job Description
  - Save a Job Descriptions (and Apply Changes)
  - Import a Job Description for the Requisition (and Job Code)
  - Edit an Existing Job Description
  - Revert Job Description to Job Code Default
- Manage Sources for a Requisition
  - Actions Required to Post a Job On-line
- Other Requisition Detail Tools
- Start (or Participate in) the Approval Process
- Post the Job Opening to Job Boards

Develop Requisition Content

With **BALANCE*trak*** Requisition tools, develop the following content:

- Add a Form to the Requisition for completion by the Job Seeker
- Create or upload the Job Description
- Select and track job posting Sources

To perform these tasks, access the Review Requisition detail in one of two ways:

- After adding a new Requisition (per the instructions linked above), the system will direct you to the detail.
- ☑ Enter the detail from the **Requisitions** list.

Use the Forms Menu

BEFORE YOU BEGIN: During Implementation, a set of organization-specific **Form Templates** (e.g., PRESCREENER, NON-EXEMPT APPLICATION, SELF-ID) will be stored in the system for use in Requisitions. A default Form may already be associated with a new Requisition; refer to: Add a Requisition / About Requisitions and Default Forms.

In addition, Forms may be added to the Requisition, and their settings edited, as discussed in this article.

Overview of the Forms List

Forms List *(Figure 5)* —

Once populated, the Review Requisition detail / Forms table is organized by the following *columns*:

- Name
- Form Type
- Form to Follow — Where applicable, a Form will be listed. To change it, click the [Form Name].
- Job Posting Page — A ✔ **Check mark** indicates whether the Form is being used on a Job Posting page. If your organization differentiates between Internal and External applicant Forms, that will be indicated.

Notes: Once a Requisition is live and the Status is Accepting Applications, access to Add or Edit a Form may be disabled. Contact your organization's **BALANCE*trak*** Administrator for more information.

Any Form added to a Requisition for a particular Job Code becomes a default for that Job Code. Any new Requisition for the same Job Code will contain the same Form(s).

Icons —

The Forms table displays the following icons *(Figure 5):*

- **[PDF] —** View a PDF version of the Form in a new window
- **[Edit Form] —** Modify an existing Form, and make form changes.
- ✖ **[Delete] —** Remove a Form. (And click **[OK]** to confirm the deletion.)
- **[Add Scoring Scheme] —** Create a Scoring Scheme that will assign values to applicant responses
- % **[Edit Scoring Scheme] —** Edit an existing Scoring Scheme

> ***Note:*** Regular users may be limited to selecting an existing Scoring Scheme from the provided menu and applying it to the current Requisition.

Add a Form to a Requisition

To include a Form with the Requisition, click the ✚ **[Plus Sign]** in the Forms *table header (Figure 5).* From the Add Forms window, select:

- Template Type
- Form Name

(Optional) If a Scoring Scheme was previously added for the Template Type, select it from the Select Scoring Scheme drop-down (or it may be added later, as described below at: *Forms Menu Icons*).

> ***Cross-reference:*** Administrative users may create a Scoring Scheme for the Requisition; see: Scoring Schemes / *Create Scoring Scheme — Within a Requisition*.

(Required) Each Requisition must be associated with a PRESCREENER or an APPLICATION. To use a PRESCREENER or APPLICATION on the Job Posting page (or change the linkage), check the box for: ☑ Use on Job Posting page.

Click **[Add]** to complete the process.

Assign Separate Forms for Internal and External Applicants *(Figure 5)*

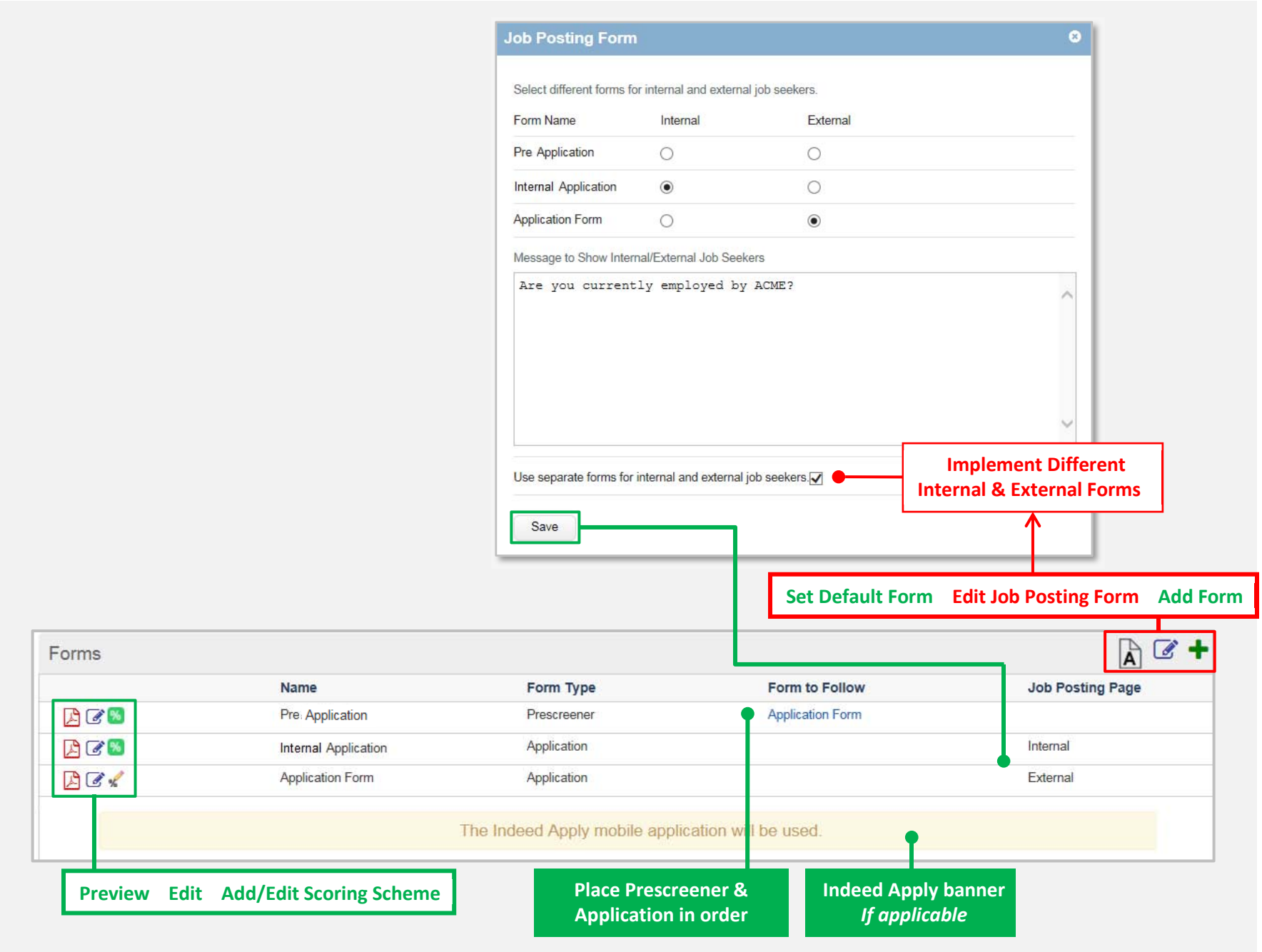
First, make sure the Forms you wish to use have been added to the Requisition (see, above: *Add a Form to a Requisition*).

From the Forms *table header*, select the **[Edit]** button. The Job Posting Form window displays. Check the box: ☑ Use separate forms for internal and external job seekers. The window will expand, displaying two *columns*, Internal and External. Using the provided ⦿ radio buttons, match the appropriate Form to each column.

Then, to enter (or review/edit) the: Message to Show Internal/External Job Seekers. This Employee Status message, which will appear after the Job Seeker clicks Apply on the Job Posting page, will route the Job Seeker to the appropriate Form. Click **[Save]**.

> ***Note:*** Enter the message in question format, so that an answer of “Yes" will indicate the Job Seeker is internal, and an answer of “No" will indicate the Job Seeker is an external candidate.

Figure 5: **Forms list and Job Posting Form menu**



Set the Default APPLICATION

(For employers using supplemental APPLICATIONS)

Because **BALANCE*trak*** associates the most recently completed APPLICATION with a Job Seeker, the system needs to know which one of the multiple APPLICATIONS is the default.

Click the **[Default Application]** button, found in the Forms *menu header (Figure 5).* From the display form Names, select the appropriate APPLICATION. You may also select the option to: Use the system default behavior for choosing the latest Application. Click **[Save]**.

The selected default APPLICATION will be accessible when you:

- Review the applicant on the Job Seekers page, using the application **[Application]** icon.
- Comparing Job Seekers, using the **[View Job Seekers]** button on the **Job Seekers** page.

If an applicant completes other APPLICATIONS, those will be available in the Job Seeker detail, but will not be associated with the above processes.

> ***Cross-reference:*** To add a form to the list, see the instructions above: *Add a Form to a Requistion*.

Edit the Job Posting Form Options *(Figure 5)*

Choose the **[Edit]** icon from the Forms *table header* to open the Job Posting Form menu. The menu will list any existing APPLICATIONS that you may associate with the Job Posting page. Choose an existing APPLICATION, or select:

- Do not show this requisition on the Job Posting page.
- Use separate forms for internal and external job seekers. (Then, use the radio buttons to match an existing form to either Internal or External. Optionally, enter a message to display for the Job Seekers.)

Click **[Save]**.

Job Description Tools

Create a Job Description

Click the **[Edit]** icon, located in the Job Description *menu header*. Then, from the Edit Job Description menu, click the **[Expand]** icon in the Description/Job Summary *header*. Choose a Section from those provided in the drop-down menu (e.g., Required Skills, Responsibilities).

For each Section, enter the appropriate text in the text editor, and format the text, using the available word processing tools. Options for saving the Job Description Sections are detailed next.

Preview the Job Description

Click the **[Preview]** button in the Job Description *footer* to view the Job Description as it will appear to the Job Seeker.

Save a Job Description (and Apply Changes)

Click **[Save]** after working in each Section. The saved Section will then display as part of the Job Description to Job Seekers.

About Saving Job Descriptions — To help maintain the integrity of stored Job Descriptions, role-based permissions, installed during Implementation, will control the saving of Job Descriptions at the Requisition and library levels. Most users will be limited to saving the Job Description at the Requisition level.

For each Job Description Section, the full range of options are as follows — Save Job Description Changes to:

- **This requisition and the default job description for [job code] (standard setting) —** Updates to the current job description will also be applied to the default job description and all new requisitions for the job code. (The default job description is stored with the Job Code Reference table.)
- **This requisition only —** Updates will be limited to the current job description.
- **This requisition, the default job description and all open or pending requisitions that use this Job Code —** Updates to the current job description will also be applied to open or pending requisitions for the same job code.

Import a Job Description for the Requisition (and Job Code)

Select the **[Edit the Job Description]** button to open the editor. Then select the **[Import]** button from the *menu footer* in any Job Description section. This will direct you to the wizard for importing a default Job Description for the Job Code.

1. Browse and locate the document on your computer. Then click the **[Next]** button.
2. The Identify Section Headers menu displays. By default, the drop-downs will display every paragraph identified in the document.
    - Navigate to the bottom of the page for **[Apply Filter]** tools, which can be used to reduce the list of data recognized for import. Here, identify how *section headers* in the document are formatted, either bold, italicized, or by font size (value).
3. Return to the top of the page. From the Identify Section Headers menu, ☑ check the box for each of the default Sections to include. Then choose matches from the incoming file for each one from the corresponding Section Header and Next Section Header drop-downs.
    - Click **[Next]**.

    Note: 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. Beginning of Document and the End of Document tags are also available.
4. A menu displays, with options to: Overwrite Existing Job Descriptions.

⦿ Select one of the following options for saving the imported Job Description to:

- ○ This requisition and the default job description
- ○ This requisition only
- ○ This requisition, the default job description and all open or pending requisitions that use this job code

Click the **[Import]** button.

5. The Review Requisition detail displays, with the imported Job Description.

Cross-reference: An Administrator may import multiple default Job Descriptions. See: Special Tools by Reference Table / *Import Job Descriptions*.

Edit an Existing Job Description

Click the **[Edit]** icon, located on the right side of the Job Description *header*. Make any changes, following the applicable instructions provided above to: *Create a Job Description*.

Revert Job Description to Job Code Default

(When available) To remove any edits made to the current Job Description and restore it to the Job Code's default, click the **[Revert to Default]** button.

Manage Sources for a Requisition

KEY TOPICS:

- Manage Sources for a Requisition
    - Track a Source (and Assign Cost)
    - View Web Form Links
    - About Auto-Post
- Post the Job Opening to Job Boards
- Actions Required to Post a Job On-line

Track Recruiting Sources for Job Openings

The Sources table (at the top of the ☑ Review Requisition detail) stores records of external recruitment sites, where the job opening is, or will be, posted. Existing Sources will be displayed by:

- Name
- Auto-Post (on or off)
- Cost
- Tracking Code (used by the system to track referral sources from integrated career sites)

Some Sources will typically come with your **BALANCE*trak*** Implementation, and some, or all, may display automatically when the Requisition is added to the system.

Track a Source (and Assign Cost)

Add a Source — Click on the ✚ **[Plus Sign]** on the right of the Sources *menu header* to open a list of Sources that are available in your BALANCE*trak* Implementation. Select one or more Sources by ☑ using the checkboxes; then click **[Save]**.

Delete a Source — To remove a Sources item, click the ✖ **[Delete]** button, which is located to the left of each entry.

Assign (and Edit) Cost (Where available) — Click the Assign link, and enter one. If a prior Cost entry has been made and is editable, click the entry to change it. When finished, select **[Save]**.

View Web Form Links

Click ❯ **[Expand]** to view associated Web-page Forms (e.g., PRESCREENER, APPLICATION). To view the Web Form as the Job Seeker would see it, select the corresponding Web address entry.

The Web address will include the Tracking Code, which is used to compile content for **Reports** in the REFERRAL SOURCE group.

Cross-references: A form is linked to a Web page when it is created or added; see:

- Add a Requisition / *About Default Forms and Requisitions*
- Build the Requisition / *Use the Forms Menu*
- Reports > Select Reports

About Auto-Post

If Auto-Post is enabled for one or more Sources, this is indicated by a ✔ **[Check mark]** under the corresponding column. A Requisition will automa. cally be posted to the Web, based on the Requisition Status that designates it as open. To turn off Auto-Post for a Requisition, click the ✔ **[Check mark]**.

"Manual" posting to the URL may be required for some Sources. If so, an appropriate actions menu will appear in the Review Requisition detail. Follow the prompts as indicated to post the Requisio n on line.

> ***Note:*** Available Sources for selection (and related functions) are determined during Implementation and managed at the Administrav e level, based on the job board's functionality and the integration.

Post the Job Opening to Job Boards

Below the Approval Process menu in the Review Requisition detail, you will see a specific menu for each job board your organization has contracted with. Menu options will vary for each job board.

> ***Example:*** If you are posting a posi on to CareerBuilder, you will be asked to check off applicable job type categories for the position, prior to clicking the **[Post Job]** bu on.

For additional informa. on on:

- **Sources** — See the *BALANCEtrak Training Guide* at: *Review Requisition Screen / Sources.*
- **BALANCE*trak's* integrations with job boards** — Please contact Berkshire's Product Support.

Actions Required to Post a Job Opening On-line

The following actions must be in place for a job listing to appear on the branded Career page:

1. The Requisition Status must be set to: **Accepting Applications**.
2. The Posting Start Date must be valid.
3. A Form must be set to show on the Career page (PRESCREENER or APPLICATION).
4. The Job Description must have content.

These actions are described in more detail, by returning to the instructions for building a Requisition, as linked above.

For a job listing to appear on a third-party job board:

- A separate agreement or contract with the third-party may be required.
- Entries for City and State are required for external job boards.

Start (or Participate in) the Approval Process

KEY TOPICS:

- Submit a Requisition for Approval: Develop a Simple Process "on the Fly"
- Approve a Submitted Requisition
- View Approval Status and History

RELATED TOPICS:

- Build the Requisition
- Dashboard Notifications / *Requisitions Needing Approval*

Submit or Approve a Requisition as part of the Approval Process

(Where installed) If your organization requires approval for Requisitions before they are posted, an Approval Process will be made available to you in the system. As a **BALANCE*trak* u**ser, you may participate in the Approval Process as:

- The submitter (Requisition owner/creator)

  OR

- An approver (e.g., Human Resource director, hiring manager)

Home page Dashboard reminders and email notifications will support the submitter and the approver(s) during the Approval Process. Instructions pertaining to both roles are included below.

Submit a Requisition for Approval: Develop a Simple Process "on the Fly"

After a Requisition is added to the system (and while it is in a Pending status), an Approval Process menu appears in the Review Requisition detail. A simple process may be developed at this time.

If you are not already in the detail, select the Requisition's **[Review]** icon from the **Requisitions** list. Scroll down to the Approval Process menu; click the **[Submit for Approval]** button to open the menu, which will be labeled with the Requisition Number. Select:

- New (Administrators or Requisition owners only)

  Drag and drop Available Approvers to Selected Approvers, using the provided *name bars*. To create a Basic Group of users (from which only one needs to provide approval), drop a *name bar* on top of a *name bar* already in the Selected Approvers *column*. Once a group is made, other Available Approvers may be added; selected Approvers may be

moved into the group; and additional Basic Groups may be created. Adjust the order of the *name bars* or groups, as necessary.

OR

- Existing (and select one from the provided drop-down)

Click **[Save]** to initiate the process. An email will be sent to Selected Approvers in order, and the Approval Process menu will appear when the approver enters the Review Requisition detail.

If an approver rejects the Pending Requisition, the submitter can select **[Resubmit]** after making the necessary Requisition changes.

Approve a Submitted Requisition

As an approver, the user will receive an email notification, containing links for the following three approval responses:

- I want to log in and view the requisition.
- I want to approve this requisition without logging in.
- I want to not approve this requisition without logging in.

AND

A message on an approver's **Home** page Dashboard will indicate: Requisitions Needing Approval. The approver can directly access the Approval Process menu (on the Review Requisition detail), containing a Comment field and the following buttons to:

- **Approve —** Sends an email message to the submitter by email and moves the process on to the next Selected Approver.

After the last approver has approved the Requisition, **BALANCE*trak*** may automatically change the Requisition Status to reflect the approval. Typically, the next Status is: Accepting Applications.

- **Not Approve —** Sends an email message to the submitter and other Selected Approvers by email and:

  A message in the Approval Process menu will state: The Requisition has NOT been approved. After making changes to the Requisition (based on Comments received), the submitter can click **[Resubmit]** to restart the Approval Process.

View Approval Status and History

Once the Requisition is submitted for approval, the status of its approval can be viewed on the Review Requisition detail under the Approval Process *banner*. The user name of the current approver will be listed.

Both the submitter and the approver may view the Approval Process by clicking **[View Process]**. They may view the current approval history by choosing **[View History]**. Once all approvers have approved the Requisition, the approval date will be shown.

Review Job Seekers who have Applied

KEY TOPICS:

- Quick Link: View Job Seekers from the Requisitions List
- View Job Seekers on the Review Requisition Detail
    - Quick Link: View Job Seekers from the Requisition Information Table
    - Job Seekers Table

NEXT STEP:

- For more on working with applicants: Use the Review Job Seeker Detail

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Review Applicants for a Job Opening

Tools will be available to help you review applicant information, once the following three system activities occur:

- A Requisition is created (and approved, if applicable)
- The job opening is posted on line
- At least one Job Seeker has applied

Cross-references: To learn about the above activities, see —

- Add a Requisition
- Requisition Information Menu, Toolbar, and Status
- Build the Requisition
- Start (or Participate in) the Approval Process

Quick Link: View Job Seekers from the Requisitions List

After accessing **Requisitions** from the *side navigation menu*, locate the Requisition on the displayed list.

> ***Quick Tip:*** To show only active Requisitions, make sure the Status view is set to: Accepting Applications. Other Status views may also help you hone in on a subset of Requisitions, having applicants.

Click the # of Job Seekers entry to display a **Job Seekers** list, filtered by the Requisition.

View Job Seekers on the Review Requisition Detail

If you have not opened the Review Requisition detail, locate the Requisition on the **Requisitions** list, and click the corresponding **[Review]** icon. Then, take advantage of two methods for reviewing applicants, as described next.

Quick Link: View Job Seekers from the Requisition Information Table

A quick link is available in the Requisition Information menu, located at the top of the page: Click the # of Job Seekers entry to display a **Job Seekers** list, filtered by the Requisition.

Job Seekers Table*(Figure 6)*

Navigate to the Job Seekers table. To maximize the Job Seekers table, click the ❮ **[Expand]** icon in the *table header*. You may also click the More link at the bottom of the table. The Job Seekers are displayed by:

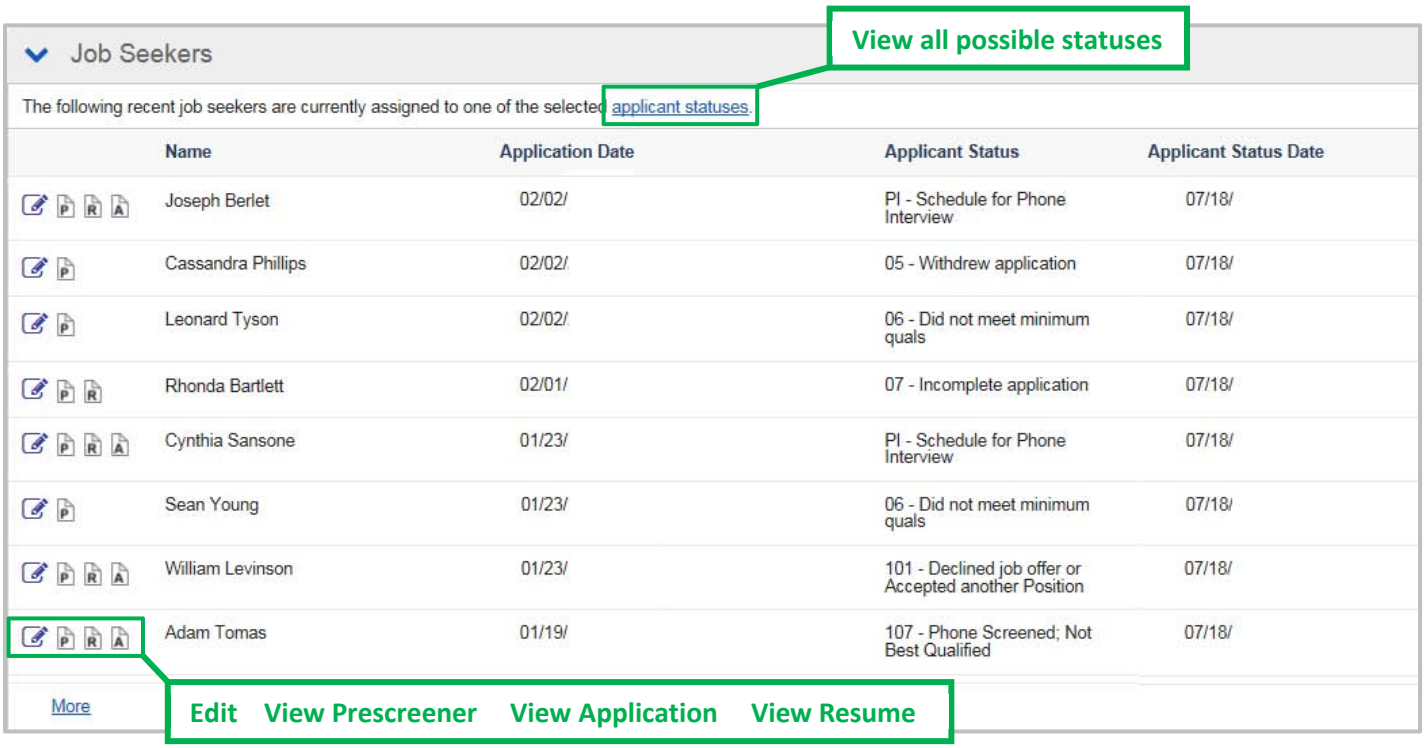
- Name
- Application Date
- Applicant Status
- Applicant Status Date
- Score — Pass **PASS / FAIL**, if an ASSESSMENT is in use, or numerical, if a Scoring Scheme is in use

The following tools will also help you review applicants:

- **Applicant Status Filter —** Based on your BALANCE*trak* Implementation, the Requisition Status, selected on the Requisition Information menu, will control which Job Seekers are displayed within the Requisition. Click the applicant statuses link, below the *table header* to view how the filter was applied, in creating the Job Seekers table.

- **Job Seeker Icons.*(Figure 6)* —**
    - Click the ✎ **[Review]** icon for a quick link to the Review Job Seeker detail.
    - View a RESUME (R), COVER LETTER (C), the completed PRESCREENER (P), or the completed APPLICATION (A), by clicking the corresponding 🗋 icon.

Figure 6: **Review Job Seekers within a Requisition**



Other Review Requisition Detail Tools

KEY TOPICS:

- Stay Current, with Calendar Events
    - Add an Event
- Export a Job Description
- Add a Document to a Requisition
- Track History/Notes
    - Add a Note
    - View the History/Notes in Print Format

Use More Tools to Develop Requisition Content

In support of building the Review Requisition detail, **BALANCE*trak*** offers the additional tools, outlined next.

Stay Current, with Calendar Events

The **Calendar** object displays any existing Event dates (in red), along with a list of corresponding Event descriptions. To the right of each Event are three icons, offering quick links to:

- **[Edit]** (Event)
- ✖ **[Remove]** (Event)
- Send a **[Reminder]** to Outlook

> ***Notes:*** An Event is limited to one Date. Typical Events may include a status meeting, the last day of work for the outgoing incumbent, or the scheduled day(s) for interviews. A Closed Requisition will not display Events to the **Calendar**.

Add an Event

Click the ✚ **[Plus sign]** on the right side of the *menu header*. In the Add Event menu, enter:

- Description
- Date
- Start Time
- End Time

Then, from a pre-populated menu of system users, use check boxes to: Select the People to Include for this Event. By default, the user creating the Event is checked. Using a checkbox, determine whether to: ☑ Send participants a notification e-mail. When the entries are complete, select **[Save]**.

In addition to displaying within the Requisition, the event will display on the 🏠 Dashboard / Calendar, identified by Requisition Number, for all users included in the event.

Export a Job Description

The Job Description can be exported for use outside of **BALANCE*trak***. From the Job Description */footer*, select File Type from the provided drop-down, either:

- HTML

  OR

- Word

Then, click **[Export]**. **[Open]** or **[Save]** the file from a new window.

Add a Document to a Requisition

First, **[Add]** a Requisition, or click the ✎ **[Edit]** icon for an existing one to open the Review Requisition detail. Navigate to the Documents menu.

Click on the ✚ **[Plus Sign]**, located on the right of the Documents *menu header*. The Upload Documents menu appears. Provide a Description; then Select a File, using the **[Browse]** function. Click **[Upload]** to add the file to the Documents list by: File Name and Description.

Track History/Notes

The History/Notes table records the actions and comments associated with the Requisition. Each History/Notes record lists:

- Date
- Email (of user associated with the action)
- Description

In preserving the Requisition's History, BALANCE*trak* automatically records — and time stamps — key activities, such as data entry/deletion, completion of required activities, approvals, and status. System Notes cannot be deleted.

Add a Note

Click on the ✚ **[Plus sign]** on the right of the *menu header* to open the Add Note menu. Enter a Note. Then, click **[Save]**.

Once the Note is added, icons become available to ✎ **[Edit]** and ✖**[Delete]** the record in the future.

View the History/Notes in Print Format

Click the 🗎 **[Display]** icon, also located in the *menu header*. The History/Notes appear in a new window, suitable for printing or saving.

Requisitions List: Customize and Save Views

KEY TOPICS:

- Create a Customized View
    - Add (and Delete) Optional Fields to View
    - Clear Search
- Opening an Existing View
- Remove an Existing View

Create Custom Views and Save them for Future Use

The **Requisitions > Customize View** tab allows the user to create, save, and apply display options for the **Requisitions** tab. In addition to refining the **Requisitions** list by using filter and search options, optional fields can be added or removed to adapt the display for specific needs.

First, select **Customize View** from the *tab header*. Below the Save Options menu, two tables display the following types of Requisition fields, respectively:

- **Default Fields Included in View** (static Requisition fields)
- **Optional Fields Included in View** (components of a custom View, as described below).

Create a Customized View

Begin at the top of the page, on the Save Options menu: Select the radio button for: ⦿ New; and enter the: View Name.

(Recommended) Check the box adjacent to the message: ☑ Save this view for later use. Once saved, the View will appear in the Existing drop-down for future selection.

> ***Quick Tip:*** The **Home** page lists any Saved Views at the top of the Dashboard.

Add (and Delete) Optional Fields to View

Navigate to the menu, entitled: Add Fields to View. Choose one or more options from the menu. Any selections made will then appear as *bars* under: Optional Fields Included in View. Optional fields can be reordered for the **Requisitions** tab by clicking and dragging one or more *bars* to create the desired order. To further narrow the included optional field to a specific value, enter a value in the Search Values *column*.

Remove an optional field from the Add Additional Fields to View menu by clicking the ✖ **[Delete]** icon to the right of the entry.

When finished, select **[Apply Search]** to view the **Requisitions** tab, based on the entered **Customize View** settings.

Example: To view the **Requisitions** list with a Status *column* —

- Click the Status link under: Add Fields to View. Then select **[Apply Search]**.
- Status will then be displayed for all Requisition records.
- To refine the Requisitions results further, return to the **Customize View** / Default Fields Included in View. Choose and apply, for example, the Keyword Search: Interview Scheduled.
- The **Requisitions** list will be filtered to show those with the Status of: Interview Scheduled.

Clear Search

Choose the **[Clear Search]** button from the center of the **Customized View** tab or at the top of the **Requisitions** tab.

Open an Existing View

On reentry to the **Customize View** tab, select: ⦿ Existing. Then select a View name from the drop-down menu.

> ***Note:*** If there are no Existing Views, the option is grayed out.

Click **[Apply Search]**.

Remove an Existing View

A View Name must be selected from the Existing (View) drop-down. Click on the adjacent **[Remove this View]** button. A confirmation message will appear; click **[OK]**.

Export Requisitions

KEY TOPICS:

- Choose Requisition Status to Include
- Determine File Type for Exported Data

RELATED TOPIC:

- Export Job Seekers

Export Requisition Data

Requisition data may be exported for use outside of **BALANCE*trak***, in Excel or text formats.

Access **Requisitions** from the *side navigation menu*; and then choose **Export** from the *tab header*. The Export Requisitions menu will display.

Choose Requisition Status to Include

Using checkboxes, determine whether to Export Requisitions with a Status of:

- Pending
- Open
- Closed

Determine File Type for Exported Data

Next, under File Types, select either:

- Excel 97-2003
- Excel 2007

  OR

- Text (Comma Separated Values)

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

Job Seekers List Tools

KEY TOPICS:

- Filter the Job Seekers List by Category and Requisition
    - Show Score (if a Scoring Scheme is in place)
- Filter by Column
    - (Job Seeker) Name
    - Email Address or other Optional Field
- Job Seeker Icons
- Assign Applicant Status
    - Other Methods to Assign Status
- View Multiple Job Seekers (and Assign Status)
- Delete a Job Seeker
- Copy Job Seekers to another Requistion
    - Transferring the Job Seeker's Assessment Status (Where applicable)
- Import a Resume to Update Job Seeker Data
- View Job Seekers during the Application Process (Administrator-level permissions only)
- Send Email from the Job Seekers List

Perform Job Seeker Actions from the Job Seekers List

The **Job Seekers** list offers several tools for performing important Job Seeker activities, including some beneficial shortcuts *(Figure 7).* These tools are described below.

Filter the Job Seekers List by Category and Requisition

The View and Requisition drop-downs in the *tab header* will help you refine the **Job Seekers** list to hone in on information that is relevant to the task(s) at hand.

First, from the **View** drop-down, select one of these Job Seeker categories:

- **All**
- **Recent –** Job Seekers who have applied in the last 10 days
- **Not Reviewed –** Job Seekers who do not have an assigned applicant status
- **Internal –** Job Seekers who are current employees
- **Flagged –** Only those Job Seekers who have been flagged (as described below)

Cross-reference: For information on setting a default View, refer to: BALANCE*trak* (User) Account Settings.

Next, from the **Requisition** drop-down, select:

- All

  OR

- [A specific Requisition Number]

Show Scores (If a Scoring Scheme is in place)

After choosing a Requisition Number from the upper Requisition drop-down, an additional *bar* will display, with the label: Show Scores For. From the provided drop-down, select the Form that has been scored to display a Score *column* on the **Job Seekers** list.

Filter by Column

(Job Seeker) Name

From the **Job Seekers** list, click the **[Filter]** icon, located in the *column header* for (Job Seeker) Name. Then, enter: First Name and/or Last Name. Click **[Save]** to apply the filter.

A yellow *banner* will indicate that the **Search** is applied. To restore the full **Job Seekers** list, select the **[Clear Search]** button.

Email Address or other Optional Field

First, make sure a *column* for Email Address (or another optional field) is visible on the **Job Seekers** list. If the *column* is not visible, choose **[Change Fields]** from the *upper toolbar*. Then select the field from the provided menu, and **[Save]** it to the **Job Seekers** list.

Finally, click the **[Filter]** icon, located in the *column header* for Email Address (or other optional field). Then, enter the relevant filter criteria, and click **[Save]**.

Job Seeker Icons

Click on an icon to the left of each Job Seeker record for quick links to:

- **[Review]** an individual Job Seeker's information.
- Open a Job Seeker document, such as
  - COVER LETTER
  - RESUME
  - Completed PRESCREENER
  - Completed APPLICATIOIN

Quick Tip: If an existing Job Seeker applies to a new job Requisition without uploading a new RESUME, the system automatically associates the Job Seeker's most recent prior RESUME with the Requisition.

- **[Flag]** a Job Seeker to highlight the record in red. Click the icon a second time to clear the highlighting.

Assign Applicant Status

To assign applicant Status to a Job Seeker or change it on the **Job Seekers** list, a Requisition Number/name must be selected from the Requisition drop-down. Click the check box next to one or more Job Seekers, then choose **[Assign Applicant Status]** from the upper *toolbar (Figure 7)*. When the pop-up window appears, select the appropriate.status from those provided. Click **[Assign]** to apply the setting.

Note: The system will display the name of the data field(s) used to denote applicant Status (e.g., Applicant Stage, Disposition Code).

Cross-reference: If you want to learn about Requisition Status, instead, see: Requisition Information Menu, Toolbar, and Status.

Other Methods for Assigning Applicant Status

Status can also be applied:

- Using the **[View Selected Job Seekers]** button
- By clicking the displayed [Applicant Status entry] in the Review Job Seeker detail, under: Jobs Applied To.

View Multiple Job Seekers (and Assign Status or Flag)

Select the check box next to two or more Job Seekers. Click on the **[View Selected Job Seekers]** button, which becomes active in the upper *toolbar (Figure 7).*

The Job Seeker selections display, organized by the following tabs:

- **Resume** (current)
- **Application**

Use the *page controls* at the top of the page to click through the RESUMES and APPLICATIONS, in the order they were originally selected.

From either tab, assign an Applicant Status, using the tagline located beneath the *tab header*. If the Job Seeker has not been assigned a Status, click on Assign; if a current Applicant Status requires updating, click on the displayed [Status entry] to change it. Then from the Applicant Status drop-down, select the appropriate option, and **[Save]**.

Note: Typical options include Hired, Not Qualified, Withdrew Application, Set up 1st Interview, and Ready for Offer Approval, but the system may provide others.

Also available is a ☑ check box to: 🚩 Flag Job Seeker on the **Job Seekers** list and highlight the record with a red overlay.

When finished, close the window to return to the **Job Seekers** list.

Delete a Job Seeker

☑ Select the check box next to one or more Job Seekers, and then click **[Delete Selected]**. Verify the deletion, and click **[OK]** to continue.

Copy Job Seekers to another Requisition

Select the ☑ check box next to one or more source Job Seekers. Then select [Copy Selected] from the *toolbar*. In the Copy Job Seeker menu, make selections for:

- Requisition to Copy to
- Application to Copy Answers to
- Prescreener to Copy Answers to

When finished, click **[Copy]**.

Transferring the Job Seeker's Assessment Status (Where applicable)

When a Job Seeker is copied from one Requisition to another — and Forms match — the Job Seeker's ASSESSMENT status of PASS can be carried over. In the ✎ Review Job Seeker detail > Jobs Applied To table, a status of Already Passed will display for the "new" Requisition.

Import a Resume to Update Job Seeker Data

Prepare File(s) — The following document formats are accepted:

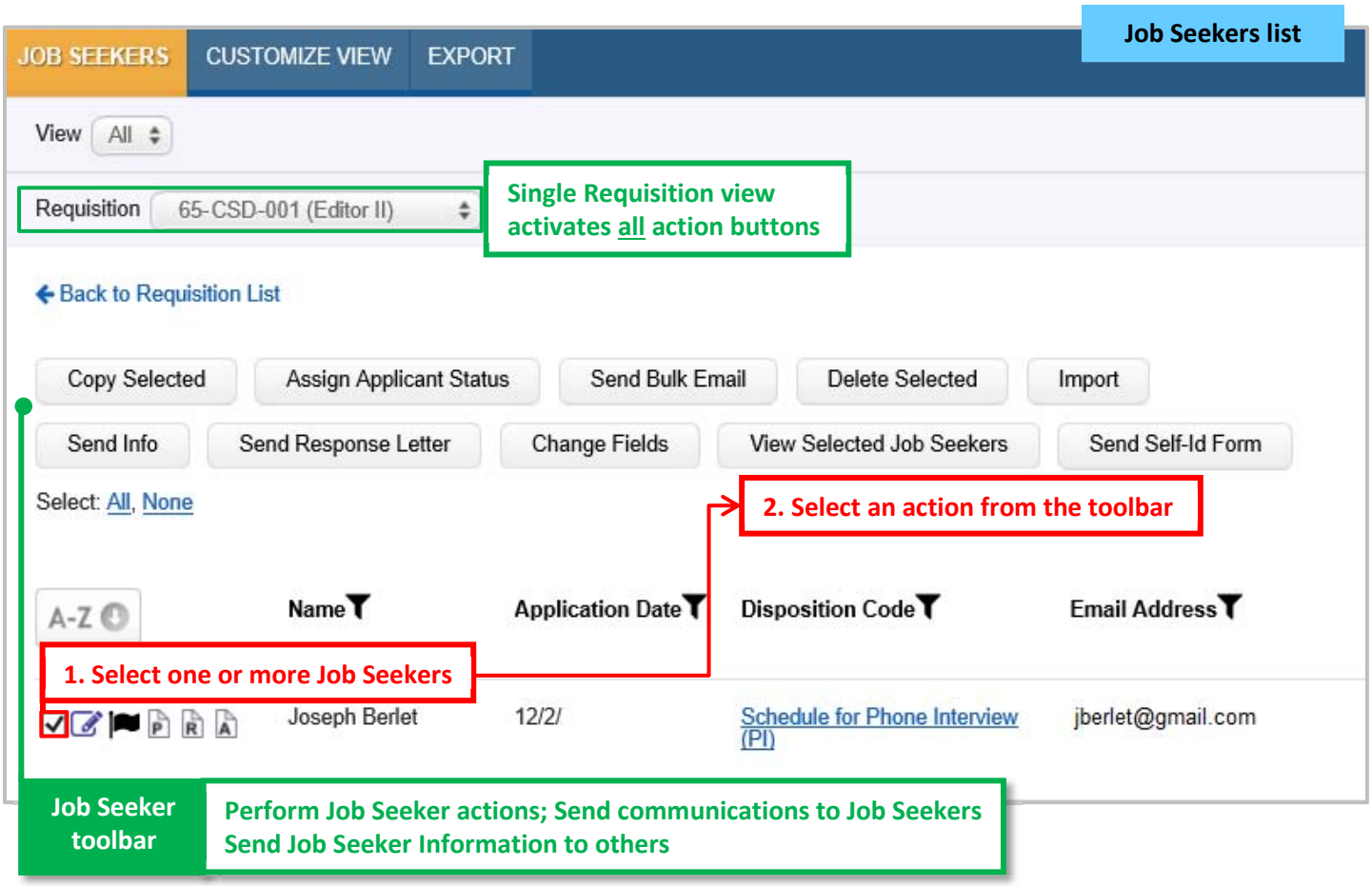
- Microsoft Word (DOC, DOCX)
- Acrobat (PDF)
- Rich text (RTF)
- Plain text (TXT)

Begin — Choose the **[Import]** button from the *toolbar*.

1. Select ⦿ one of two File Type options from the Upload Files menu:
    - Upload separate files for each resume.
    - Upload a zip file containing resumes.

   Use the **[Browse]** function to locate the file on your computer. If additional files are to be uploaded, use the **[Add Another File]** button. When finished, select **[Next]** to continue.

Figure 7: **Job Seeker actions**



2. From the Overwrite Type menu, select ⦿ one of two options:
    - **Update existing job seekers with the information being imported —** Replace the Job Seeker's data with the uploaded data; old data for that Job Seeker will be lost.
    - **Do not update existing job seekers and show a list of duplicates —** View a list of updated and existing records to choose the data to retain.

    Click on the **[Import]** button at the bottom of the menu.

3. A results message will display. Choose **[Import More Job Seekers]** if there is an additional Job Seeker RESUME to upload

    OR

    Select **[Back to Job Seeker List]** to view the updates.

A Job Seeker record is created from each file; and the RESUME is available for view, via the 🗋 **[Resume]** icon.

View Job Seekers during the Application Process (Administrator-level permissions only)

From the upper View menu, select: Incomplete (or Incomplete Application). The following settings must be in place:

- A system Profile must be in place, allowing you to see these Job Seekers.
- A Requisition Number must be selected from the Requisition drop-down.
- The Requisition must have the status of: Accepting Applications.
- The Requisition's Job Seeker Filter Setting is required to be set to: Must Complete a Form or Must Complete Application, respectively.

Send Email from the Job Seekers List

KEY TOPICS:

- Send Bulk Email to Job Seekers
  - Compose Email Message
  - Preview and Send Email
- Send Job Seeker Info(rmation to Colleagues)
- Associate a Job Seeker with a Requisition and Send Information

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Send Bulk Email to Job Seekers

To send an email, ☑ select the check box next to one or more Job Seekers; then choose **[Send Bulk Email]** from the upper *toolbar*. The Send Email menu opens.

> ***Quick Tip:*** A group of Job Seekers may be selected, based on Applicant Status, to receive a standard response letter.

Compose Email Message

Under Email Content, select one of the following:

- **Use your own text —** (For users with permission to send customized emails only) Enter: Subject Line and Body. Format the Body, using the provided *formatting toolbar*.

- **Choose a Template —** From the Template drop-down, choose the appropriate option from those provided. Typical templates may include:
  - Not Qualified
  - Send Auto Acknowledgement
  - Send Background Check Form

The Subject Line and Body are pre-populated, but can be edited. Enter information for any template tags (identified by brackets).

Add any file Attachments to the message from your computer, using the **[Browse]** button.

☑ At the bottom of the page, check off whether to send a BCC of the message to your user email address.

Preview and Send Email

After composing the message, select **[Preview and Send]**. A Preview window appears; if the message is satisfactory, select **[Send]**, or click **[Cancel]** to edit the message.

Notes: An individual email may also be sent from the ✎ Review Job Seeker detail, using the Job Seeker Information *toolbar*.

Send Job Seeker Info(rmation to Colleagues)

☑ Select one or more Job Seekers. Choose **[Send Info]** from the upper *toolbar*. A Send Email window opens, with options for recipients, content, and attachments *(Figure 8).*

Under Send To, select one or more BALANCE*trak* Users, using the ☑ provided check boxes. Enter external e-mail addresses, if any, in the Additional Recipients field below, separated by semicolons.

Continue creating the email message, as described above at: *Compose Email Message*.

Job Seeker-specific Attachments — By default, the Job Seeker's RESUME is sent with the email message. To add other documents, scroll down to the Attachments menu, and ☑ make appropriate selections:

- PRESCREENER
- APPLICATION
- COVER LETTER
- Additional Documents — External files can be attached to the message, using the [Browse] button.

Finally, **[Preview and Send]**.

Associate a Job Seeker with a Requisition and Send Information

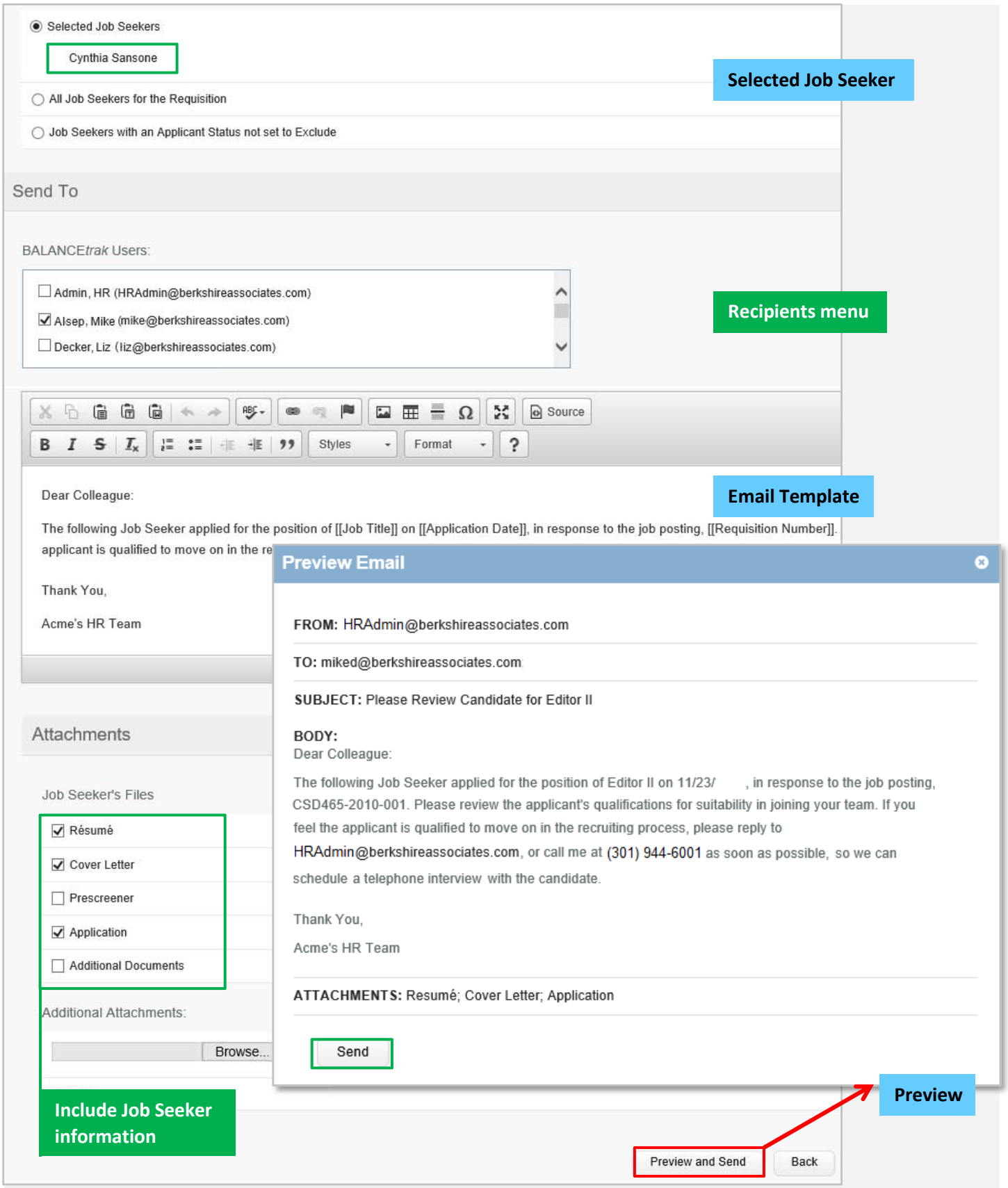
If a Job Seeker on the **Job Seekers** list is associated with multiple Requisitions, the Job Seeker Information can be associated with a Requisition before the message is sent.

☑ First, check off (only) one Job Seeker. Then, choose **[Send Info]** from the upper *toolbar*. The Send Email screen will display. From those options presented in the Requisitions menu, choose a Requisition.

Note: Only Requisitions associated with the user's access code will display.

From the Send To menu, select one or more BALANCE*trak* users and other recipients. Then, follow the instructions on the previous page, above, to: *Compose Email Message* and *Preview and Send Email.*

Figure 8: **Send Job Seeker Information and include Attachments**



Resolve Duplicate Job Seekers (Administrators only)

About This Feature

During the initial BALANCE*trak* Implementation, your organization will have elected whether to have an optional check for duplicate Job Seekers activated, for Administrator use only. If so, the system will flag instances on the **Job Seekers** list where multiple records may represent the same Job Seeker.

The Administrator (or other designated user) may click the **! [Flag Duplicate Job Seeker]** icon to the left of a flagged Job Seeker's Name to review the set of similar records.

> ***Note:*** If you have questions about the duplicate Job Seeker check, please contact your System Administrator or Berkshire's Product Support, as appropriate for your role and organization.

Review and Resolve Records

Click on **! [Flag Duplicate Job Seeker]** for the identified Job Seeker record to open the Merge Duplicate Job Seekers screen. The flagged record you clicked on will display first, on the left side of the table. Other similar records will display in columns for comparison purposes.

1. Determine which record is "key" (or the most current), based on the identifying information (i.e., the Job Seeker's account Profile). Click the **[Select]** button for this record.
2. Identify the record(s) to be merged into the best record, and ☑ select each one.
3. Click **[Save]**.

The "jobs applied for" information will be merged together. Although the Profile information for the "key" record will be retained, identifying information on the merged records will be dropped.

A note in the Job Seeker History will indicate that the record has been merged.

Use the Review Job Seeker Detail

KEY TOPICS:

- Job Seeker Information and Toolbar
- Jobs Applied To
  - View and Edit Applicant Status
  - View Submitted Job Seeker Forms
  - Email a Blank Form to the Job Seeker
- Documents
  - Add (and Delete) a Document to the Job Seeker Record
- Calendar
  - Add an Event (and attach Job Seeker's Resume)
- History/Notes
  - Add a Note
- Perform Job Seeker-related Actions

Review and Update Job Seeker Information

To enter the Review Job Seeker detail, select a **[Review]** icon from the **Job Seekers** list: Job Seeker information can be reviewed and added, or actions related to the Job Seeker can be performed, as described below and in the accompanying article, respectively.

Job Seeker Information and Toolbar

Icons in the Job Seeker Information *toolbar* offer quick links to perform the following functions, depending on user permissions:

- **[Edit Job Seeker Information]** — Update the Job Seeker's personal information.
- **[Send Email to the Job Seeker]** — Create a Message or use an existing Email Template. The message may be blind-copied (BCC'd) to the originator's email address, as associated with the user account.
- **[Edit Security Functions]** — Reset and **[Save]** the Security Answer, Password, Security Question, and/or Security Answer.
- **[Copy the Job Seeker to Another Requisition]** — If a candidate is better suited for a different job opening, include the Job Seeker in another Requisition.
- **[Send Job Seeker (Info) to Others]** — Send documents and information about a job candidate to colleagues.

Jobs Applied To *(Figure 9)*

For a cumulative list of open positions to which the Job Seeker applied, scroll down to: Job Applied To. This table displays job information by:

- Requisition Number
- Job Title
- Application Date

The Job Seeker's **[Resume]**, and **[Cover Letter]**, as applicable, are available through an icon to the right of each record.

View and Edit Applicant Status

Click the Applicant Status entry to assign status or edit the displayed status.

View Submitted Job Seeker Forms

To access Forms — submitted by the Job Seeker in response to job postings — navigate to: Jobs Applied To. Then, **[Expand]** a Requisition record. Following the Form name, the status of the Form is listed, either Completed, Started But Not Completed, or Not Started — depending on what the Job Seeker has saved in the system.

To view the PDF, click the appropriate **[PDF]** icon. To edit the Job Seeker's Form, click the **[Edit]** icon.

The Job Seeker may submit the following Forms (or others specific to your organization), which will be access bile in PDF format:

- PRESCREENER
- APPLICATION
- BACKGROUND CHECK
- SELF-IDENTIFICATION

Email a Blank Form to a Job Seeker

The following link is visible after clicking the **[Expand]** triangle:

- **Email to Job Seeker** — Send the Job Seeker a link to an uncompleted form. (See also: *Send Bulk Email to Job Seekers*.)

Documents

The Documents table stores files, associated with the Job Seeker, with links to the Job Seeker's:

- Most Recent Resume
- (Where required or included) Most Recent Cover Letter

Add (and Delete) a Document to the Job Seeker Record

System-compatible formats are:

- PDF
- DOC
- DOCX
- RTF
- TXT

Click the ✚ **[Plus sign]**, located in the Documents *menu header*. From the Upload Documents menu, select Document Type:

- Resume
- Cover Letter
- Other

(Optional) Enter a Description.

Finally, use the **[Browse]** function to Select a File, and click **[Upload]**.

The Document will be listed by: File Name and Description. To remove the Document, click the ✖ **[Delete]** icon to the left of the File Name. When the confirmation message appears, click **[OK]**.

> ***Note:*** Only one (Most Recent) Resume and one (Most Recent) Cover Letter may be saved. If a new version is uploaded, the system will ask whether to overwrite the prior version. **[OK]** or **[Cancel]** the upload. To save additional versions of the same document, use: Other.

Calendar

Displays existing event dates (in red) on a graphical Calendar, along with a list of event descriptions. To the right of each event are three icons, offering quick links to:

- **[Edit]** Event
- ✖ **[Remove]** Event
- Send **[Reminder]** to Outlook

> ***Note*:** An event is limited to one Date. Typical events may include an interview, a deadline, or an approval meeting.

Add an Event (and send Job Seeker's Resume)

Click on the ✚ **[Plus sign]** on the right side of the Calendar *menu header*. In the Add Event menu, enter:

- Description
- Date
- Start Time
- End Time

Then, from a pre-populated menu of system users: ☑ Select the People to Include for this Event. By default, the user creating the event is checked. Using the provided check box, determine whether to: ☑ Send participants a notification e-mail.

If applicable, check the box next to: ☑ Attach the job seeker's resume to the notification email. When the entries are complete, select **[Save]**.

Each recipient will receive the notification, an ICS file for import into Outlook's Calendar, and optionally, a PDF of the Job Seeker's Resume.

History/Notes

History/ Notes are displayed by:

- Date
- Email (of user associated with the action)
- Requisition Number (if the record is associated with one)
- Description

BALANCE*trak* automatically records History for several activities related to data entry/deletion, completed of required activities, communications, approvals, and status.

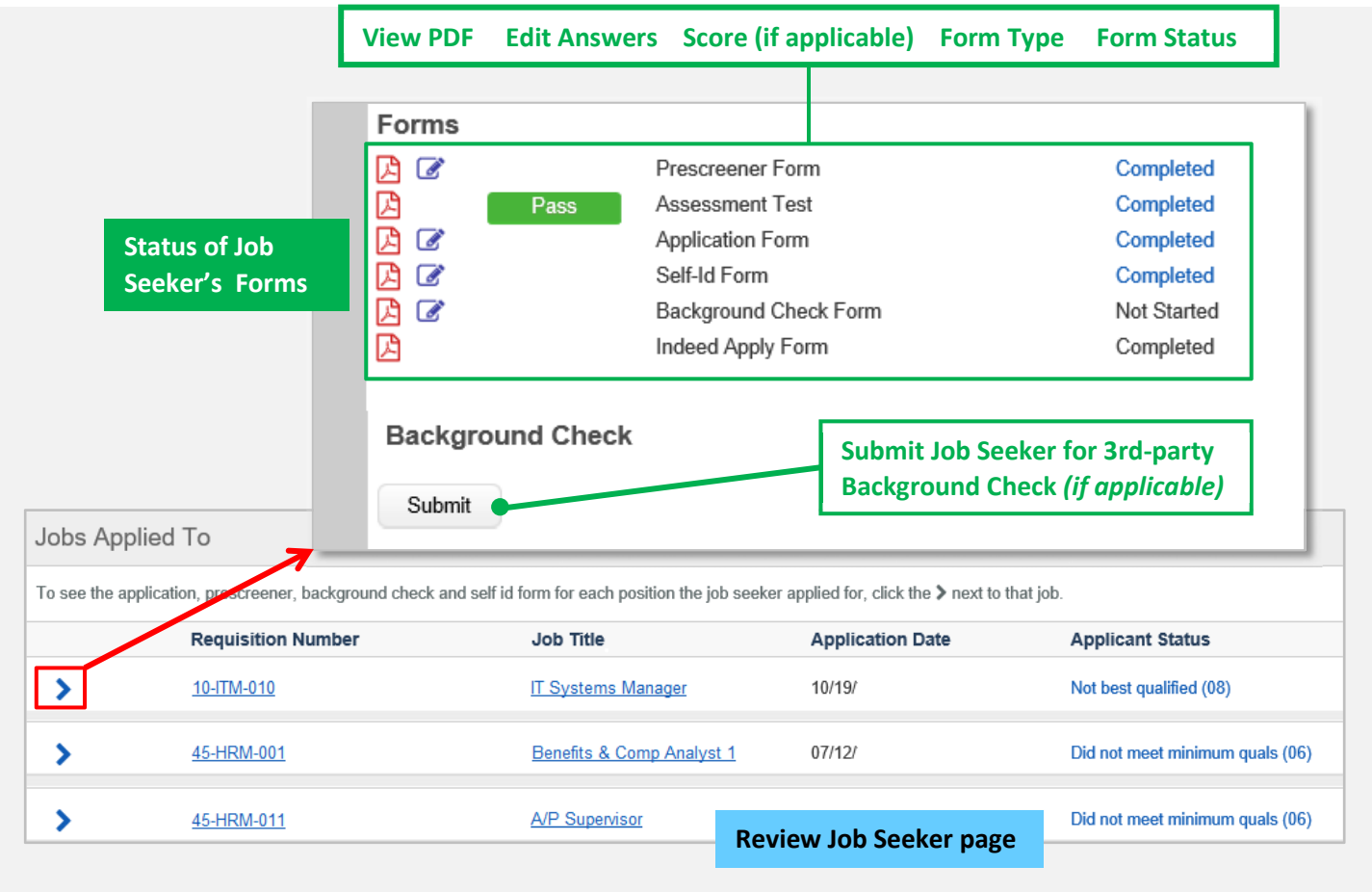
To view the History/Notes in a print format, click on the **[Report]** icon, located in the *table header*. The History/Notes appear in a new window, suitable for printing or saving.

Add a Note

Add a comment to the Job Seeker's History/Notes by clicking on the ✚ **[Plus sign]** on the right of the *table header*. In the Add Note menu, enter a Note, select None or the Requisition Number, and click **[Save]**.

After the Note is added, icons become available to **[Edit]** or ✖ **[Delete]** the Note.

Figure 9: **Review Job Seeker — Jobs Applied To and completed Forms**



Perform Job Seeker-related Actions

KEY TOPICS:

- Submit a Job Seeker for Background Check
- Initiate (or Participate in) the Hiring Approval Process
    - Submit a Job Seeker for Hiring Approval
    - Cancel the Hiring Approval Process for a Job Seeker
    - Approve a Submitted Job Seeker for Hire
    - View Approval Process and History
- Submit the Hired Job Seeker to Onboarding

Use Review Job Seeker and other Tools for Hiring Approval

Once a candidate has been selected as a potential hire, **BALANCE*trak*** supports and helps automate the next steps in the process. These tools are available by navigating to the **Job Seekers** tab and accessing a Job Seeker record (Review Job Seeker detail).

Submit a Job Seeker for Background Check (Where installed)

First, the information necessary for the background screening must be collected from the Job Seeker.

Then, in the Review Job Seeker detail, scroll down to: Jobs Applied To. Click **[Expand]** for a specific Requisition Number. Under Background Check, click on **[Submit]**. Follow the provided prompts to initiate background screening through the third-party provider.

Cross-references: For information on using a Background Check form, see:

- *Learn about Form Types (on-line* **Help***)*
- Build the Requisition */ Use the Forms Menu*

Initiate (or Participate in) the Hiring Approval Process

For actions involving hiring approval, there are two user audiences:

- **Submitter —** The recruiter or HR professional who coordinates aspects of applicant workflow, such as screening, interviews, and the selection of candidates for hire
- **Approver —** The hiring manager with decision-making authority

Submit a Job Seeker for Hiring Approval

On the ✎ Review Job Seeker detail, scroll down to Jobs Applied To. Click ❯ **[Expand]** for a specific Requisition Number to show the Hiring Approval Process menu.

Click the **[Submit for Approval]** button. Most users will only be permitted to select one of the ⦿ Existing processes from the provided drop-down. However, please review the process to ensure it contains the proper approvers and steps, or select another one.

Click **[Save]** to initiate the process. An email will be sent to Selected Approvers, and the Approval Process menu will appear when the approver enters the ✎ Review Job Seeker detail from the **Job Seekers** list.

If the Approval Process menu is not sufficient, contact your **BALANCE*trak*** Administrator. If you are an Administrator, you may add a new process at this time, as outlined next.

Cancel the Hiring Approval Process for a Job Seeker

A **[Cancel]** button in the Approval Process menu is made available for the submitter, who can discontinue an ongoing process. When the confirmation message appears, click [**OK**].

Create the Approval Process (Administratiors only)

After **[Submit for Approval]** is clicked, select the radio button for: ⦿ New. Below the *page header*, users who have the following system permission will display as Available Approvers, in the left-hand *column*:

- Allowed to approve Job Seekers for hire
- Have user access for the [Business unit] code and the current Requisition

Drag and drop one or more users from Available Approvers (on the left) to Selected Approvers, the *column* on the right side. Reorder multiple Selected Approvers by dragging and dropping them above or below each other; each Selected Approver will receive an approval request once the preceding approver has replied with: Approve.

To reuse this Approval Process, click the checkbox: ☑ Save this process for later use. Then, provide a: Process Name.

> ***Quick Tip:*** If the Approval Process is specific to hiring, enter a name that reflects its particular use.

Clicking **[Save]** will initiate the process, in the same manner as using an Existing one.

Cross-references: Administrators may refer to the following information:

- *Make an Existing Approval Process Active/Inactive*
- *Define an Approval Process in Advance*

Approve a Submitted Job Seeker for Hire

If Job Seeker has been submitted for hiring approval and you are a Selected Approver, notifications will be sent, automatically. In addition, an Approval Process menu will be available on the ✎ Review Job Seeker detail. Navigate to: Jobs Applied to, and ❯ **[Expand]** the Requisition record.

An approver may also access the Approval Process menu, from:

- The email notification
- A message *banner* on the **Home page** Dashboard
- A message *banner* at the top of the Review Job Seeker detail
- **Requisitions** > Review Requisition detail / Job Seekers table / Job Seeker record

Using Email — The approver will receive an email notification, containing the following three approval responses:

- I want to log in and view the job seeker. (And follow the instructions directly above.)
- I want to approve this job seeker without logging in.
- I want to not approve this job seeker without logging in.

Using BALANCE*trak* — The Approval Process menu will contain a Comment field and buttons to:

- **Approve —** Sends an email message to the submitter (and the next Selected Approver in order) by email.
- **Not Approve —** Sends an email message to the submitter by email, and the message in the Approval Process menu (and history) will state: The Job Seeker has NOT been approved.

View Approval Process and History

From the Approval Process menu, both the submitter and the approver may:

- **[View Process]** — A list of designated approvers
- **[View History]** — The current approval history by: Name, Date, Status, and Comments

To return to the main screen, click the **[Close]** icon in the *menu header*.

Submit the Hired Job Seeker to Onboarding (Where installed)

If your organization currently have an account with EMPTrust, the Review Job Seeker detail for each "hired" Job Seeker will have an EMPTrust menu.

Once all required fields have been populated for the Job Seeker's record, click the **[Submit]** button. A message will indicate that the information has been forwarded to EMPTrust. To send any additional or edited information, click the **[Resubmit]** button.

Job Seekers List: Customize and Save Views

KEY TOPICS:

- Create a Custom View
  - Choose Requisition(s)
  - Select Save Options
  - Save the View for Future Use
  - Add Fields to View
  - Apply View Settings
- Search Resumes to Create a Custom Job Seekers list
- Other Customize View Tools
  - Delete a Field from the Optional Fields Table
  - Clear Search
  - Opening an Existing View
  - Remove an Existing View

Create and Save Custom Views

The **Job Seekers > Customize View** tab allows the user to create, save, and apply display options for the **Job Seekers** tab. Optional fields can be added or removed to adapt the display for specific needs.

> ***Quick Definition — What is a Custom View?*** A custom View is a filter or search, employed to narrow the **Job Seekers** list by one or more Job Seeker identifiers. This method is well-suited for complex or often-used searches and those involving Resume and Form content.

To begin, consider the types of data fields you want to work with. The following menus on the **Customize View** tab represent the types of data available:

- **Default Fields Included in View —** Search Values on this table involve integral, "static" Job Seeker fields.
- **Optional Fields Included in View —** This table, representing a myriad of further identifiers, will not be populated until these fields are defined, as described in *step 4* below.
- **Resume Search —** A custom **Job Seekers** list may be generated by performing a search on Resume content.

Create a Custom View

The custom View is created by completing the steps, outlined below.

1. **Choose Requisition(s)**
   To begin, from the Requisition drop-down, just below the *tab header*, select whether to search and filter on:
   All (Requisitions)
   OR
   [Specific Requisition Number]

2. **Select Save Options**
   From the Save Options menu, select the radio button for: ⦿ New; and enter the: View Name.

   Quick Tip: If no views are saved, the system selects: New.

3. **Save the View for Future Use**
   (Recommended) Check the box adjacent to the message: ☑ Save this view for later use. Once saved, the View will appear in the Existing drop-down for future selection.

   Quick Tip: A banner, listing Saved Views, will appear at the top of the 🏠 **Home** page Dashboard.

4. **Add Fields to View**
   For All Requisitions (or a selected Requisition), navigate to the Add Fields to View menu. Using the default **Find** menu (or sub-tab), type in a keyword, and click **[Go]**. From the Search results, which display below the menu, choose the [Field Name], and it will be included, as a *bar*, in the menu: Optional Fields Included in View.

   Quick Tip: Not all keyword Searches will produce results. To see what optional fields are available for your Implementation, click **[Change Fields]** on the **Job Seekers** list, and review the entries. (✪ Close the menu, without saving any changes.)

   The optional fields can be reordered for the **Job Seekers** tab by clicking and dragging one or more *bars* to create the desired order.

   (After selecting a specific Requisition in step 1 only) To hone in on a particular Form field, click on the **Forms** sub-tab, which will appear in the Addi Fields to View menu. Select one of the provided links for a [Field Name]. The corresponding Question will also display to aid in selecting the field.

5. **Apply View Settings**
   When you are finished determining the View settings (as described above), select **[Apply Search]** to view the **Job Seekers** tab, based on the entered **Customize View** settings.

Search Resumes to Create a Custom Job Seekers List

Navigate to the Resume Search menu, and enter one or more terms to be found in Resume content. Then click **[Apply Search]**.

Example: To review applicants who listed prior supervisor-level sales experience on their Resumes, enter “sales and supervisor”.

Other Customize View Tools

Delete a Field from the Optional Fields Table

To delete a field, added according to *step 4* above, click the ✖ **[Delete]** button to the right of the entry. Continue with the appropriate steps to save, build, and apply this change to the View, as described above.

Clear Search

Choose the **[Clear Search]** button from the center of the **Customized View** tab or at the top of the **Job Seekers** tab.

Open an Existing View

Return to the **Customize View** tab / Save Options menu. Select: ⦿ Existing. Then select a View Name from the drop-down.

> ***Note:*** If there are no Existing Views, the option is grayed out.

Click **[Apply Search]**.

Remove an Existing View

Select a: View Name from the Existing (View) drop-down. Click on the adjacent **[Remove this View]** button. When the confirmation message appears, click **[OK]**.

Export Job Seekers

KEY TOPICS:

- Choose Requisitions to Include
- Determine File Type for Exported Data
- Filter Job Seeker Data to Include

RELATED TOPIC:

- Export Requisitions

Export Job Seeker Data

Job Seeker data can be made available in Excel or text formats for use outside of **BALANCE*trak***.

From the **Job Seekers** module, choose the **Export** tab from the *tab header*.

Choose Requisitions to Include

Using the drop-down in the *page header*, choose whether to Export Job Seekers for:

- All Requisitions
- [A single Requisition Number]

Determine File Type for Exported Data

Select a File Type to Export to, either:

- Excel 97-2003
- Excel 2007

  OR

- Text CSV (Comma Separated Values)

Filter Job Seeker Data to Include

Make selections from the Filter Options menu to hone in on particular Job Seeker data. Options may include those in the following categories:

- Location, Establishment, Plan Code, Department, or other organizational unit
- Requisition and/or Applicant Status
- Posting Start Date, Employee Acceptance Date, and/or other date

Quick Tip: If no criteria are selected or entered within a menu, All is the default selection, creating more results. Any selections made will reduce the number of results.

Further filters are available under Job Seeker Fields and Requisition Fields to organize how the data will be displayed. In the exported file, each Job Seeker will represent a row, or line item, in the exported file. All ☑ checked Fields will display as columns, with the Field label as the *column header*.

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

BALANCEtrak > Reports > Select Reports

BEGIN HERE: Before working with **Select Reports**, learn about the following modules —

Reports

- Export Settings
- Filter
- Report Settings

KEY TOPICS:

- Determine Select Report Settings
  - Global Settings
  - Report Group Settings
  - User Access Report Group Settings (Administrators only)
- View a Report
- Select Reports for Export
- Clear a Current Filter

Select Reports to View, Print, or Export

On entry to **Reports** from the *side navigation menu*, the **Select Reports** list will display — as allowed by your user permissions and organized by Report Group.

> ***Cross-reference:*** For a full list of available Reports, see: *BALANCEtrak Training Guide (available on-line).*

Determine Select Report Settings

Global Settings

Click the **[Global Settings]** button in the Report Group *header* to include a date or a custom *footer* to all generated reports.

Report Group Settings

Click the **[Group Settings]** icon to change the settings and filters for a particular Report Group, as described in the following table:

Report Group	Filter on:	Group Reports by:
Executive Summaries	Date Range	Yes
Referral Source	Application Date Show Referal Source by (URL, Question)	No
Requisitions	Post Start Date Post End Date Employee Acceptance Date Employee Start Date Requisition Detail (Requisition Statuses)	No
Job Seekers	Application Date Requisition Status Requisition Fields *(as listed for Requisitions, above)* Job Seekers by Requisition Referral Source Field (Questions, URL, Tracking Code)	Yes Applicant Status
EEO	Application Date Applicant Status Job Seeker Zip Code Analysis • (2000 Census Data, 2006-2010 ACS Tabulation Data)	Yes Applicant Summary (Applicant Status, Job Group) Job Seeker Zip Code Analysis (Zip Code, County, State, MSA) EEO Counts (Requisition Number, Job Code)
History	Activity Data User History (Email Address, Activity Type) Search History (Email Address, Search Type)	No

User Access Report Group Settings (Administrators only)

By clicking the (⚙ **[Group Settings]** icon for User Access, reports can be run as follows:

- User Access Log (⦿ Run by User or [Business Unit] Code)
- User Permissions (☑ Show Inactive Users)
- User Profile Log (Email Address)
- User Profile Log (Data Profile and Function Profile)

View a Report

First, from the *page header*, ⊙ select to view reports in:

- HTML

  OR

- PDF

If HTML is selected, reports will be displayed in a new browser window, one page at a time, with navigational tools available.

Reports in PDF format will open in a new window, allowing the report to be saved to another location. PDF format is the preferred option if you plan on printing the generated report(s).

Click the **[View Report]** icon to view a single report. From this page, you can also print the report.

Select Reports for Export

The following methods are available to check off the **Reports** you want to export:

- Click the All link, located just below the Reports list *header*
- ☑ Check the box in the Report Group *header* (selects all reports in the group)
- ☑ Check the box adjacent to the Report Name
- Deselect any selections by clicking the None link at the top of the page

Once one or more selections are made, click the **[Export]** button. The Report(s) will be exported, using **Reports >** Export Settings. You will be prompted to open or save the file(s), once exported.

> ***Note:*** Depending on the browser or security settings, you may not be able to proceed with downloading the file. If this occurs, adjust the browser settings, or use a link that will appear on the page.

Clear a Current Filter

The **Select Reports** screen will include an *upper banner*, if a Filter has been set. Use the **[View Filter]** button to return to the **Reports > Filter**; or click the **[Clear Filter]** button to restore the default settings.

BALANCEtrak > Reports > Export Settings

KEY TOPICS

- Choose How Files will be Organized
- Select File Type

NEXT STEP:

- Select Reports

Select Options for Exporting a Report

Choose How Files will be Organized

To begin, ⦿ select one of the following:

- A Single File
- Separate Files

Select File Type

Then, ⦿ choose the File Type:

- Excel
- Excel-Data Only
- PDF
- Rich Text
- Word

Click **[Save]** to apply the above settings when one or more Reports are exported, using 🗀 **Select Reports**.

BALANCEtrak > Reports > Filter (Optional)

KEY TOPICS:

- Filter by Selected Field
- Group by Selected Field

NEXT STEP:

- Select Reports for Viewing or Export

Customize Reporting by Selecting Values in Data Fields

Because certain optional settings can be beneficial to reporting output, read the article below — and visit the 🗀 **Reports > Filter** module — before entering **Select Reports**. By selecting values within Requisition fields here, you can globally tailor the reporting output to hone in on particular areas of interest.

> ***Quick Tip:*** Under **Reports**, two **BALANCE*trak*** modules control global reporting options — While **Report Settings** determine what fields to include as *columns* for applicable reports, **Filter** settings narrow and sort results by field values.
>
> A third module, Export Settings, controls the format for exported report files.

Please note that while some fields are typical to all Implementations (e.g., Requisition Number), other fields will be specific to your BALANCE*trak* implementation (e.g., [Business unit] Code, Recruiter [code or name]).

> ***Note:*** Filters by Report Group (e.g., for Job Seeker- or Requisition-specific reports) are available on **Select Reports**, using ⚙ **[Group Settings]**.

Filter by Selected Field

The upper Filter menu allows you to: Filter reports on the selected field.

⦿ Choose one of provided options, which will include, but are not limited to:

- Requisition Number
- [Business unit]) Code

The default setting is: ⦿ Do not filter on a field.

If a field is chosen, the menu will expand to include existing values available in the field. ☑ Select one or more of the provided values. You can also select All or None.

Group by Selected Field

The lower Filter menu provides options to: Group reports on the selected field. This setting will result in a report that is sorted by values in the Requisition field.

The default setting is: ⦿ Do not group on a field.

> ***Notes:*** If a Filter is currently set, you may only Group by a level that is higher than the field currently being filtered on. In addition, "Group Reports by" on the **Select Reports > ⚙ [Group Settings]** menu will supersede the Filter group setting applied here.

> ***Examples:*** If a company relies on "Division" as the business unit, filter values may include "Marketing (California)" and "Public Affairs (Washington, DC)". Reporting results will only output for those two Divisions.
>
> Meanwhile, a report, simply grouped by "Division", will display "line-item" results for each named Division in the organization.

Click **[Save]**, which will apply the settings to the next report, viewed or exported via **Select Reports**. (The **Select Reports** page will indicate a Filter has been set.)

BALANCEtrak > Reports > Report Settings (Optional)

KEY TOPICS:

- Choose Requisition Category to Customize
- Choose Fields to Include in Reports

NEXT STEP:

- Select Reports for Viewing or Export

Customize Reporting by Selecting Data Fields

Because optional 🗀**Report Settings** may be beneficial to you, visit this module and read the article below, prior to viewing or exporting a report. By selecting Requisition fields (where applicable), and values within those fields, you can globally tailor the reporting output to hone in on particular areas of interest.

> ***Quick Reminder:*** Under 🗀**Reports**, two modules control global reporting options — While **Report Settings** determine what fields to include as *columns* for the reports bulleted below, **Filter** settings narrow and sort all results by field values.
>
> A third module, Export Settings, controls the format for exported report files.

Choose Requisition Category to Customize

Using the upper drop-down, select the report:

- Open Requisitions
- Closed Requisitions
- Applicant Detail
- Requisition Detail

Choose Fields to Include in Reports

After the category is chosen (as described above), the available fields will display. ☑ Check off one or more appropriate fields, and click **[Save]**. Up to eight fields may be selected to appear as additional *columns* in reports.

Click **[Save]**, which will apply the settings when the next report is viewed or exported via **Select Reports**.

BALANCEtrak > Administrative Settings > Reference Tables

KEY TOPICS:

- What are Reference Tables?
- View a Reference Table
  - Sort by a Reference Table Column
  - Display Inactive Codes
- 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
  - Rename a Table
- Import Reference Tables
- Export Reference Tables
- Special Tools by Reference Table

Manage Reference Tables

By accessing **Administrative Settings > Reference Tables**, the user with appropriate Administrative-level permissions can manage tables that are necessary to support the system's operation.

Important Note: Because **Reference Tables** are integral to proper software operation, please take the following steps before making changes:

- Review this article, and: *Special Tools by Reference Tables*.
- Consult Berkshire's Product Support for guidance.

What are Reference Tables?

Organized by topic, **Reference Tables** serve as "legends" for the information you (and other users) will collect and track as your organization fills job openings. These tables house the menu options, or codes, you will have when entering data into **BALANCE*trak***.

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

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

- Applicant Status
- [Business unit] Code
- Job Code
- Referral Source
- Position Type
- 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)

View a Reference Table

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 headers*. 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.

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 🖫 **[Save]**.

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).

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]**.

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 destination:

- Back to Import
- Return to Reference Tables

^***BALANCE*aap *users:*** If you have created an Affirmative Action plan in **BALANCE*aap*** with the relevant table(s), you may select to: Import from BALANCE*aap* (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 > Administrative Settings > Special Tools by Reference Table

KEY TOPICS:

- Applicant Status
  - About Auto Assign and Status
  - Order Values (for use with Auto Assign)
- Job Code
  - Import a Job Description for a Single Job Code
  - Import a Job Description for Multiple Job Codes
- [Business unit] Code
  - About [Business unit] Codes and Multiple Career Pages
  - Assign to Career Page
- (Two-Stage Process) Applicant Stage

Use Tools for a Specific Reference Table

Based on the Reference table content, other special tools are available. First, select **Administrative Settings > Reference Tables**. Then select one of the tables from the *upper toolbar* (listed under *Key Topics* above), and refer to the instructions below.

Important Note: Because **Reference Tables** are integral to proper BALANCE*trak* operation, please do the following before making changes:

- Review this article, and: Reference Tables.
- Consult Berkshire's Product Support for guidance.

Applicant Status

About Auto Assign and Status

Although a Job Seeker's PRESCREENER responses may trigger multiple applicant statuses, BALANCE*trak* can only "Auto Assign" one Status to a Job Seeker. Therefore, the Administrator can place these options in order of priority, by accessing the Applicant Status Reference table.

Order Values (for use with Auto Assign)

Select the Applicant Status table from the *upper drop-down*, and choose the **[Order Values]** button from the *table header*

bar. If both applicant stage and applicant disposition levels are being used, buttons will be available for both Reference tables.

From the Order Status page, move an applicant Status 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.

Job Code

By accessing the Job Code Reference table via **Administrative Settings**, default job-description files can be imported into BALANCE*trak* 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.

   (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]**.
3. Return to the top of the page. From the Identify Section Headers menu, ☑ check the box for each of the BALANCE*trak* 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 existing 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: Requisitions / Edit an Existing Job Description.

However, when working in a default Job Description, only one option 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 identifies 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 BALANCE*trak* 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.

[Business unit] Code

About [Business unit] Codes and Multiple Career Pages

Depending on your organization's language, codes may be for location, division, subsidiary, or other unit. If multiple branded Career pages were set up during Implementation, these unit codes can be used to ensure openings are posted on your intended page.

> ***Important Caution:*** If you are an Administrator and have questions about changing these settings, please contact Berkshire's Product Support to ensure your organization's Career pages show accurate information.

Assign to Career Page

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

- By Career Page

  OR

- By [Business unit] Code

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

(Two-Stage Process) Applicant Stage

For each Reference Code, describing an Applicant Stage, an optional Notification system can be developed to alert user groups when particular applicant-related phases are initiated.

The 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 selection.

  OR

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

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

BALANCEtrak > Administrative Settings > Questions (Library)

KEY TOPICS:

- Overview of Questions
  - Learn About Question Types
- Add a Question to the Library
  - Review and Complete Basic Information
  - Include an Image (Optional)
  - Show Question for HR-use only (Optional)
  - Select Options for Answers
  - Determine Permissions by Question
  - Preview the Question
- Use other Question List Tools

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 **BALANCE*trak*** Administrator or Berkshire's Product Support, as appropriate for your role and organization.

Overview of Questions

A library of **Questions** is stored in **BALANCE*trak*** under **Administrative Settings**. These **Questions** serve as the building blocks for: Administrative Settings > Form Templates. Some default **Questions** will come with your organization's Implementation.

On the **Questions** list, a ✔ **Check mark** in the Completed *column* indicates that a Question has been developed and is currently available for use in Forms. However, the **BALANCE*trak*** Administrator can create additional Questions or edit aspects of existing ones.

In addition to this article, the steps necessary to develop a Question are discussed in *Learn About Question Types* and *Determine Options for Answers*. These steps include:

1. Add a Question, including determining: Type of Question.
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 Question 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

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 instructions 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 on-line ❓**Help** at: *System Tools > Profile.Management*.

Select (Answer) Options

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

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

Determine Permissions by Question

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

- No Access
- Read Only

  OR
- Read Write

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.

Use other Question list Tools

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

View Requisitions with Questions — Place your cursor over the ✔ **Check mark** in the In Use *column* to see the Requisitions where the Question is currently being used.

BALANCEtrak > Administrative 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 question.

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 document the current date. This answer field is not editable by the Job Seeker.

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.

> ***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

BEGIN HERE: Add a Question to the Library

KEY TOPICS:

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

Select Answer Options by Question Type

While some Form Questions 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 Options.

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

- After 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.” A "Departments" Reference table would be developed, making the department names available for selection by the Internal Job Seeker.

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 > Administrative Settings > Form Templates

KEY TOPICS:

- Administrative Tabs for Form Types
- Introduction and Finish Pages
- Form Template List Tools
    - Sort a Form Template List
    - Add a Form Template
- Table Controls for the Form Template List
    - Add or Edit a Scoring Scheme
    - Review an Existing Form Template

        Design/Edit a Form Template
    - Delete an Existing Form Template
    - Set the Default Self-ID Form

Manage Forms to be Completed by Job Seekers

Under **Administrative Settings**, a library of **Form Templates** is stored, for use during the Job Seeker's application process. An 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 **Administrative Settings**, please contact your system Administrator or Berkshire's Product Support, as appropriate for your role and organization.

Administrative Tabs for Form Types

Existing **Form Templates** are organized in lists by the following types, each represented in **BALANCE*trak*** by a tab in the *tab header (Figure 10):*

- **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

Introduction and Finish Pages *(Figure 10)*

Use the *navigation bar* 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** tab to return to the Templates list.

Form Template List Tools

Since default **Form Templates** for your software Implementation will already be stored in the system, tools for working with these lists are discussed next.

Sort a Form Template list

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

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 Templatewill be added to the system, displaying on the Form Template list.

Table Controls for the Form Template List *(Figure 10)*

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.

Add or Edit a Scoring Scheme

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]**.

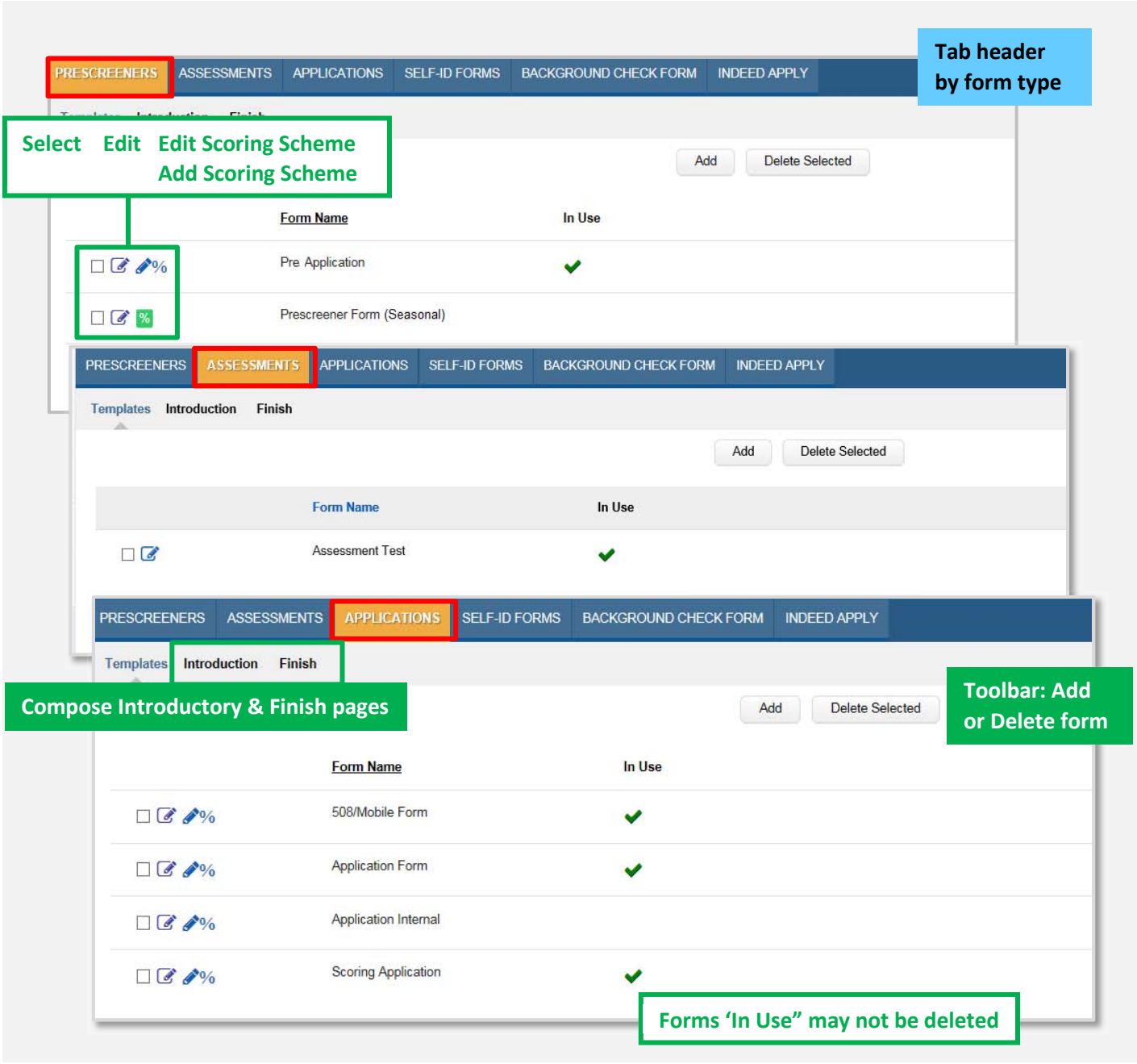
The system uses the default SELF-ID form when you select to automatically display the form or email it to a Job Seeker.

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

Delete an Existing Form Template

To remove a Form Template from the list, ☑ check the appropriate box, located to the left of the Form Name. Then choose the **[Delete Selected]** button from the *upper toolbar*.

Figure 10: **Form types and lists**



BALANCEtrak > Administrative Settings > Design/Edit a Form Template

BEFORE YOU BEGIN:

Questions (Library)

KEY TOPICS:

- About the Form Template Detail
  - About Form Sections
  - How the Form Designer is Organized
- 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
  - For Prescreeners
  - For Applications
  - For Self-ID Forms
  - For Assessments
- View the Form Template History

Use the Form Template Detail, including Section Tools

About the Form Template Detail

By expanding the **Administrative Settings** *navigation bar*, the Administrator may access **Form Templates / Templates**. Here, a Form Template's detail may be accessed 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:*** The Form Template detail will display when a new Form Template is saved to the system, as described at: Form Templates / Add a Form Template.

About Form Sections

A Form Template is comprised of Sections that display in order until the Job Seeker has completed the Form. 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 *(Figure 11)*

The form editor on the **Designer** tab is comprised of a *column* on the left with Questions and tools and 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.

Figure 11A: **Form Designer — Questions column and working area layout**

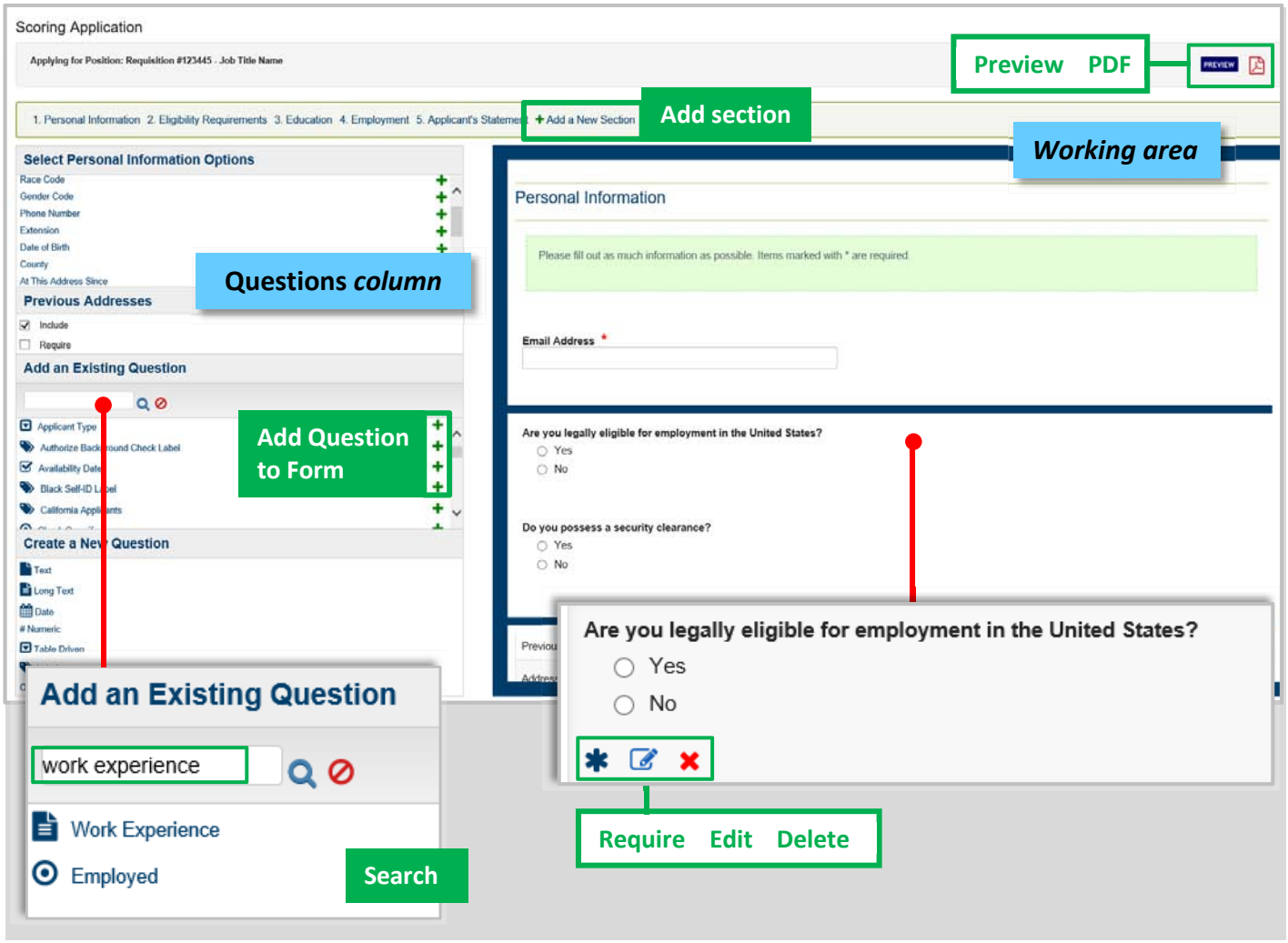
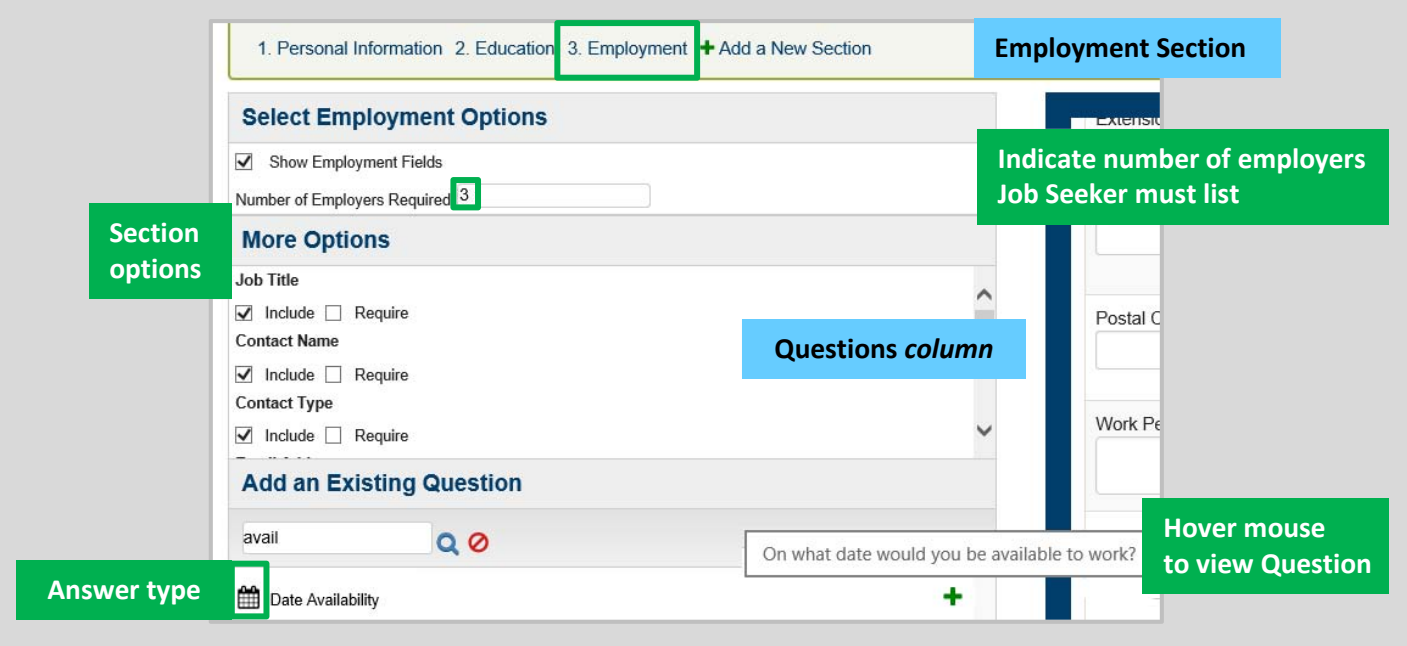


Figure 12B: **Form Designer — Question options and content tools**



Basic Template Detail Tools *(Figure 11)*

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 **[PDF]** 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, 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 *(Figure 11)*

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* for: 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 *(Figure 11).*

- ✱ (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 ϟ **[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, **BALANCE*trak*** will follow **Administrative Settings**. Refer to: Special Tools 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

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

BALANCEtrak > Administrative Settings > Scoring Schemes

BEGIN HERE: Design/Edit a Form Template

KEY TOPICS:

- Where Job Seeker Scores will Display
- Add Scoring Scheme
  - Across Requisitions, using Administrative Settings
  - Within a Requisition, using a Quick Link
- Question-and-Answer Point Values
  - View Additional Questions and Complete the Scheme
  - Add Multiple Scoring Schemes to a Form Template
- Edit an Existing Scheme for a Form Template

Manage Scoring Schemes for Form Templates

Using **Administrative Settings > Form Templates**, the Administrator may create a Scoring Scheme for a PRESCREENER or APPLICATION Form Template. By associating the scheme with a Form Template, it will be available for selection across Requisitions.

A Scoring Scheme is first added to the system, then the scheme is developed, as described below. This will allow each Job Seeker to receive a an APPLICATION (or PRESCREENER) Score, which can then be compared to the Scores of other applicants who have applied for the job opening.

Where Job Seeker Scores will Display

BALANCE*trak* will calculate the Job Seeker's overall score, compare it to the highest possible score, and display the result as a percentage. The. Scores will display for Job Seekers on the following pages:

- Home page — Home Page Dashboard Objects
- Review Requisition detail / Job Seekers — Review Job Seekers who have Applied
- Review Job Seeker detail / Jobs Applied To — Work with the Job Seeker detail

Add a Scoring Scheme

— Across Requisitions, using Administrative Settings

From the Form Template list, click the **[Add scoring scheme]** icon next to a Form Template Name. On the Manage Scoring Scheme page, click the **[Add]** button, and enter a: Name. Then click **[Save]**.

The Scoring Scheme will be available for selection when a Form of that Template Type is added to a new Requisition.

— Within a Requisition, using a Quick Link

For the user with appropriate permissions, a quick link to creating or editing a Scoring Scheme is also available within the Review Requisition detail / Forms menu, using the following icons:

- **[Add Scoring Scheme]**
- **% [Edit Scoring Scheme]**

However, when a Scoring Scheme is created or edited within a Requisition, it only applies to that Requisition.

Question-and-Answer Point Values

Values can be assigned to each Question to reflect its relative importance to other Questions. Then, for each Question, a sliding scale of scoring values can also be assigned for the following answer types:

- Checkboxes
- Options (Radio buttons)
- Table driven
- Yes/No

On the Edit Scoring Scheme page, the first Form Section will be expanded, displaying the Questions/answer choices, entered when the Section was created. Enter the point value for each Question, by clicking on the field adjacent to the Question. Then proceed to entering relative point values for each Question's possible answers.

> ***Example:*** The Question “How many years of experience do you have?” has five answer Options, reflecting a range of experience, from most to fewest years.
>
> First, the Question is given a value of 20 to reflect its importance among other Questions. Then, the response for most years of experience is given a value of 20. Then, a scale of decreasing values are assigned to the years of experience, until "0" is assigned to the least amount of experience.

As you add a value to each Question within a Section, the total will be appear in the right-hand corner of the Section *header*. Review the Section totals to ensure their relative importance is also reflected in the scheme.

> ***Notes:*** The point value of an answer choice should not exceed the point value assigned to the Question. Answer boxes with a value exceeding the overall points assigned to the Question will be highlighted in red.
>
> ***Quick Tip:*** If there are no answers listed, you can add answers by clicking the **[Add Answer]** button below the Question.

View Additional Questions and Complete the Scheme

Click on the Section *header*, (e.g., Employment, Education) to display all Questions to be scored for that Section.

As you work in the Sections, the Overall Score will appear on the upper right corner, in the menu *header*. Because a Job Seeker's Score is shown as percentage of the best Score, this number can be any number your organization chooses.

Add Multiple Schemes to a Form Template

For a Form Template with an existing Scoring Scheme, click the **% [Edit Scoring Scheme]** icon. Then click the **[Add]** button. Enter a: Name, and click **[Save]**, which will add the scheme to the Scoring Scheme list for the Form. Then develop the scheme (as described above).

The **BALANCE*trak*** user can choose one of the Scoring Schemes when creating a new Requisition.

Edit an Existing Scheme for a Form Template

Select **Administrative Settings > Form Templates** from the *side navigation menu*. Locate the APPLICATION or PRESCREENER template, and click on the corresponding **% [Edit scoring scheme]** icon. On the Manage Scoring Schemes list, enter the scheme's detail page. Review the values entered by Form Section, and make changes, as necessary. Then, click **[Save]** to apply the changes, which will only apply to new Requisitions.

BALANCEtrak > Administrative Settings > Email Templates

KEY TOPICS:

Manage Email Templates to Support BALANCE*trak* Communications

By accessing **Administrative Settings > Email Templates**, the Administrator may edit the system's default Email Templates and create custom templates for transmittal by **BALANCE*trak*** users when communicating with Job Seekers or colleagues.

The **[Add]** and **[Remove]** buttons in the *header toolbar* display with custom Email Templates, while a **[Rename]** button is available for all Email Templates. Once any changes are made to the template or its settings, click **[Save]** to make it available for use when users or the system send new email messages.

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

Cross-reference: To review how the user will interact with **BALANCE*trak's*** communication functions, see:

- Requisition Information and Toolbar / *Send Email to Colleagues*
- Job Seekers List Tools / *Send Email from the Job Seekers List*
- Use the Review Job Seeker Detail / *Job Seeker Information and Toolbar / Send Email to the Job Seeker*

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.

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.

The [Link to Form] tag only functions when the email is sent from the Review Job Seeker detail. Otherwise, this tag will not be merged when the email is sent.

Default Email Templates

— For Job Seekers

Default Email Templates with links to Forms for completion by the Job Seeker:

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

Available Template Tags — 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
    - Third-party assessment

- Job Code
- Job Title
- Sender's contact information

Default Email Template acknowledging receipt of the Job Seeker's completed APPLICATION:

- Send Auto-Acknowledgement *(Figure 12)*

— For Collaborating with Colleagues

Th following default Email Template allows BALANCE*trak* users and external addressees to review the Job Seeker's APPLICATION:

- Forward Job Seeker's Application to Others *(Figure 13)*

Email Template List Tools for Existing Templates

Choose an Existing Template for Editing

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

> ***Note:*** 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]**.

Delete a Custom Template

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

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*.

Manage an Email Template's Settings

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

- Have BALANCE*trak* use the template when automatically sending emails *(Figure 12)*

  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 BALANCE*trak* users

Develop/Edit the Email Message

Enter or edit the appropriate title for 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, bulleting, 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 Merge Text into an Email Template (*Figure 12)*

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 Executive position, 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…”.

Figure 13: **Email Template to acknowledge receipt of Job Seeker's Application**

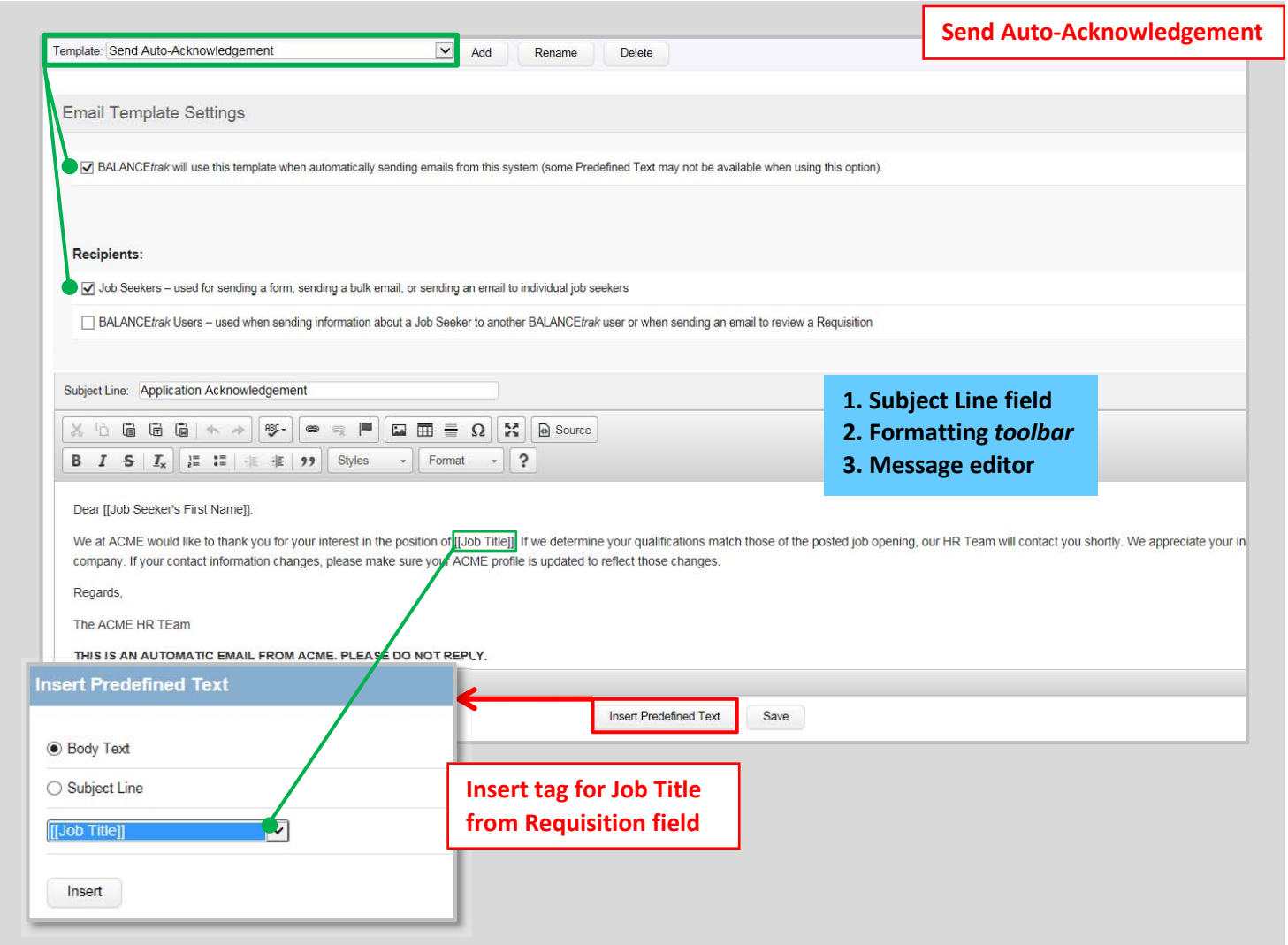
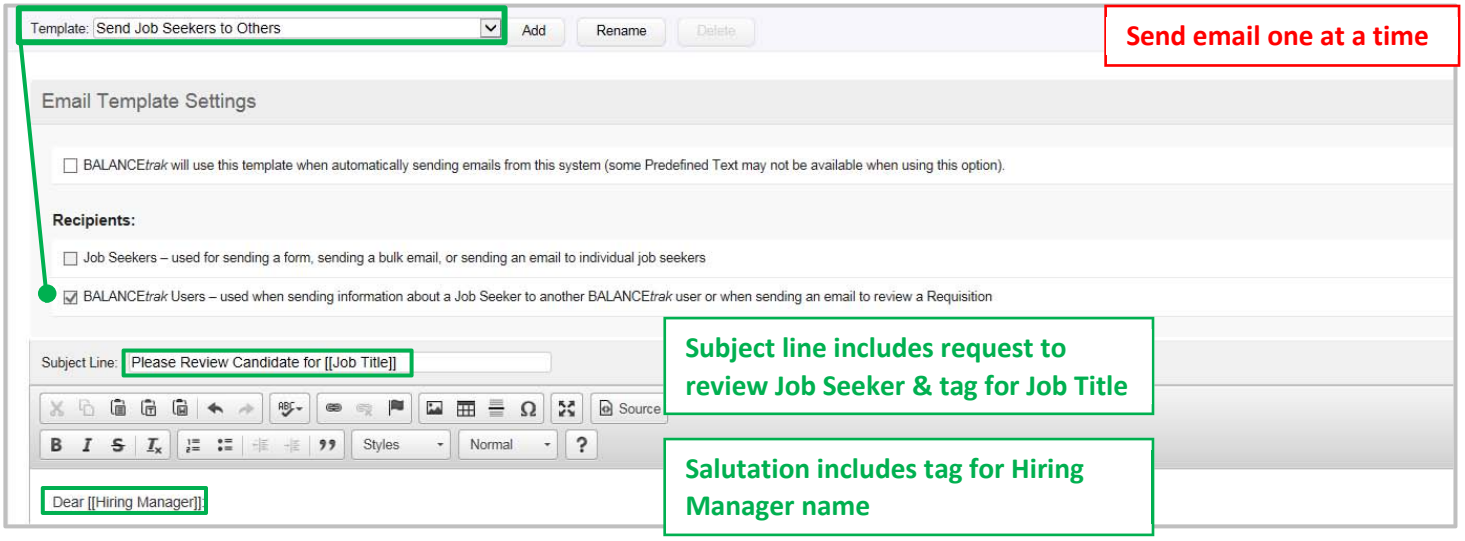


Figure 14: **Email Template to Send Job Seeker Information to the Hiring Manager**



BALANCEtrak > Administrative Settings > Approval Processes

KEY TOPICS:

- About Approval Processes
- Develop a Simple Approval Process "on the Fly"
    - Click [Submit for Approval] in a Requisition
    - Click [Submit for Approval] in the Job Seeker Record
- Define an Approval Process in Advance
    - About Managing Approval Steps and Groups
    - Add the Approval Process to the System
    - Develop the Approval Process
- Administrative Tools for Approval Processes

Define and Manage Approval Processes (for Requisitions and Job Seekers)

About Approval Processes

BALANCE*trak's* 🌍 Administrative Settings allow an Administrator to define, manage, and store **Approval Processes** for:

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

Once one or more Approval Processes are saved in the system, other BALANCE*trak* users can initiate and obtain approvals in a consistent manner.

When a Requisition or Job Seeker is submitted for approval, one or more selected approvers (from a list of available users) will receive an email notification. The message will contain tools to review and approve or disapprove the Requisition or Job Seeker, respectively.

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

Develop a Simple Approval Process "on the Fly"

The user (with appropriate system permissions) may develop a simple Approval Process while working in a Requisition.

Click [Submit for Approval] in a Requisition

Once the Requisition has been stored in **Requisitions**, begin from the Review Requisition detail. A Pending (or similar client-specific) Status on the Requisition Information menu will trigger an Approval *banner* to display, towards the bottom of the detail page. Click the **[Submit for Approval]** button.

Then follow the instructions at: *Submit a Requisition for Aproval: Develop a Simple Process "on the Fly"*.

Click [Submit for Approval] for a Job Seeker

First, the Requisition Status must indicate the candidate is undergoing: Hiring Manager Review (or similar client-specific Status). Scroll down to the Job Seekers table and locate the selected Job Seeker. Enter the Review Job Seeker detail. Then, on the Jobs Applied to menu, locate the Requisition, and click the **[Submit for Approval]** button.

For more on submitting a Job Seeker for approval, see: Submit a Job Seeker for Approval.

Define an Approval Process in Advance

About Managing Approval Steps and Groups

An Approval Process can be comprised of multiple steps, so that each step must be approved in sequence. Once a user in the final designated step submits an approval, the Requisition is approved.

> ***Notes:*** All Approval Group users for Step 1 must approve the Requisition before the email request will be sent to the Approval Group users for Step 2. If an Approval Step has multiple Approval Groups, one user from each group must approve the Requisition or Job Seeker before the step is completed. Groups within steps, do not have to provide approvals in order.

Add the Approval Process to the System

Choose the **[Add]** button from the Processes *tab header* to open the Add Approval Process Menu. Enter an: Approval Description, and click **[Save]**. The system will then advance to the Manage Approval Process screen, and add the Approval Process to the Processes list.

> ***Quick Tip:*** Make sure the Approval Description/Name reflects whether the process will be used to approve a Requisition and/or a Job Seeker.

Develop the Approval Process

1. **Select User Access Codes —** A menu, containing organizational units, will display. The units vary, depending on how the system's User Access Codes are configured (e.g., Location, Department, Division).

   Select the appropriate unit(s), or click: All.

2. **Develop Approval Steps —** Under Approval Steps, the first *column* on the left, click **[Step 1 box]** to enter a title for the first step; then choose the Save link. To create multiple steps, select **[✚ Add Step]** from the Approval Steps *header bar*. Enter a title for each step in the same manner as for Step 1.

   Order the steps by clicking the ↑ ↓ **[Up and Down Arrows]** until the order is desired.

   Click the ✖ **[Delete]** icon to remove a step.

3. **Create an Approval Group (and Add Users) —** By default, an Approval Step has one group of approvers. Start by clicking twice in the **[Group 1 bar]** to enter and save a name for the first group. Add additional groups to the step by clicking **[✚ Add Group]**. Groups are added by sequential group numbers. Enter a title for each Approval Group in the same manner as for Group 1.

   Add one or more users to a group by ☑ selecting one or more users from the Approvers list on the far right.

4. **Review and Save the Approval Process —** Select **[🗐 View Steps]** from the Approvers *header bar* to preview the Approval Process.

   ✪ **[Close]** the preview, make any necessary edits; and when finished, click the **[Save]** button at the bottom of the page.

BALANCEtrak > Administrative Tools for Approval Processes

KEY TOPICS:

- Change the Approval Process Name
- Edit an Approval Process
- Delete an Approval Process
- Display (Unhide) Inac. ve Approval Processes
- Make an Active Approval Process Active/Inactive

Approval Process Tools

The following tools are employed to manage **Administrative Settings > Approval Processes**. As applicable, an Approval Process will be designated (with a check mark):

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

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:*** An Approval Process that is In Use 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/Inactive

A ✔ **[Check mark]** in the Active *column* for an Approval Process indicates the process can be employed by users. If the process is inactive, the check mark will be grayed out; and the process will not be displayed to users.

To toggle an Approval Process between active and inactive system status, click on the ✔ **[Check mark]**.

BALANCEtrak > Administrative Settings: Archive Settings

KEY TOPICS

- About the Archiving Process
  - Default Archive Settings
- Review and Customize Archive Settings
- Perform Archiving
  - Export an Archive File
  - What Information is Saved in the Archive File?
  - Delete an Archive

An Administrator may access **Administrative Settings > Archive Settings** to:

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

About the Archiving Process

To help keep your organization's data current and improve system load times, **BALANCE*trak*** employs default settings to archive (and appropriately delete) data at determined intervals:

1. When a Requisition's Status is changed to Closed, the system will generate a Close Date, starting the "clock" on the data retention period.
2. The system will run an annual archiving scan to collect legacy data. The archived files will be available on the **Archives** tab for an additional time period. 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.

Default Archive Settings

By default, a Closed Requisition and its associated Job Seeker information will display 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, **BALANCE*trak's*** default **Archive Settings** will meet Office of Federal Contractor Compliance Programs (OFCCP) requirements for recordkeeping.

Review and Customize Archive Settings

To review the default settings or change them, first access the **Archive Settings > Automatic Archive Settings** 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

Choose the **Archive Settings > Archives** tab. If any **Archives** have already been established, links for those files will display.

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 BALANCE*trak* 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** list by clicking the Date / time link. Then follow the Windows prompts to open and/or save the Zip file.

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

Click the ✖ **[Delete]** icon to the left of the archive entry.