Managing Recruiters

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Information on each recruiter can be managed and edited by utilizing the actions made available to the admin. All of the selected actions are shown above the recruiter list in the action toolbar.

[Selecting Recruiters] [Exporting Recruiter Data] [Adding Recruiter Notes]

Selecting Recruiters

- Select a single recruiter - From the main recruiter page, select the desired recruiter by clicking on the name from the list. To view the selected recruiter, click on the â€œSelectedâ€• tab.
- Selecting a batch of recruiters - From the All, Matched, or Selected tabs, hover over Select Column at the top of the page.
- To view your selected recruiters - Click on the Selected tab.Â
  - Select Page
  - Select All
  - Deselect Page
  - Deselect All

Exporting Recruiter Data *Back to Top*

- Export - From the All, Matched, or Selected tabs, you can export recruiter data by clicking on the export recruiter icon.Â
- Select your data to export from the new window, and click the export button.Â
- Click â€œDownload CSV Exportâ€• button.

Adding Recruiter Notes *Back to Top*

- From the main recruiter grid, click on the recruiter's name, and click the â€œAdd Notesâ€• icon in the action toolbar. Draft the note, change the date if necessary, and select the note visibility.Â If you want candidates to view the note, click "Visible to Students', and then click "Save'.
- From the main recruiter grid and the All, Matched, or Selected tabs, click the â€œAdd Noteâ€• icon in the action tool bar. Draft the note, change the date if necessary, and select the note visibility. Â If you want candidates to view the note, click "Visible to Students", and then click "Save".
- Share Notes - To share your note with others in your office, select either "Personal" or "Public/Shared" from the â€œAdmin Note Visibilityâ€• drop-down menu.Â
- Confidential Notes - To keep your note confidential, select "Personal" from the "Note Type" drop-down menu.
- Filter Notes - Select to filter by â€œMy Notesâ€• or â€œAll Public Notesâ€• from the â€œFilter Byâ€• drop-down menu.
- Viewing Notes - From the recruiter grid, a note icon will appear next to the recruiter's name. Â All

previous notes will be listed by date and user entry.

Printing Recruiter Records *Back to Top*

- From the main recruiter grid page, click on the recruiter's name, and then click the â€œPrint Profileâ€• icon from the action toolbar.Â
- From the All, Matched, or Selected tabs, click the â€œPrintâ€• icon to print a batch of recruiters. Â (A defect is open in OnTime due to the "Print" icon being disabled.)

Changing Recruiter Status *Back to Top*

- Recruiter Status' are as follows:
  - Active = viewable to candidates only if the â€œCompany Researchâ€• tab is turned on in the candidate view, and the recruiter indicated â€œYesâ€• I want to share my contact information with candidates.
  - Inactive = not viewable to candidates.
  - Pending = not viewable to candidates - This status can be the default status for new recruiters that sign into the employer system.Â
- Changing the status for a recruiter - From the main candidate grid page, click on the recruiter's last name. Â You will see a drop-down menu called "Current Status". Â Select the appropriate status for the recruiter.Â
- Changing the Recruiter Status in a batch - From the All, Matched, or Selected tabs, you can click on the â€œChange Statusâ€• Icon.Â Select the appropriate status you want to give to the batch, and click â€œSaveâ€•.

Adding a Recruiter *Back to Top*

- Adding a Recruiter - Click on the â€œAdd Contactâ€• icon from the All, Matched, or Selected tabs, and enter the company's name.Â Click the â€œFind Companyâ€• button. Â If no matching company is found, click â€œEnter Companyâ€• button, enter all of the company's information, and click â€œSaveâ€•.Â
- If the company is found, select the company, and click select/continue.Â
- The list of recruiters will appear. Â Select a contact or click â€œAdd Contactâ€•.
- If the recruiter is not found, then enter the recruiter's information, and click â€œSaveâ€•.

Deleting a Recruiter *Back to Top*

- From the main recruiter grid page, click on the recruiter's name, and then click on 'Delete' icon.Â If a recruiter has transactions on file, it may not be able to be deleted.Â In this case, you should make these recruiters inactive or combine them with another recruiter record.Â Â

Combining RecruitersÂ *Back to Top*

(more information on Combining Recruiters can be found under Combining Recruiters category)

- If you have a duplicate recruiter or a recruiter that has changed his/her name, you will need to combine the recruiters.
- From the Company File, click on the Combine Recruiters sub-menu.
- Click â€œSelect Source Companyâ€•, and select the source contact from the drop-down menu - This is

the recruiter you no longer want on file.
- Click â€œSelect Destination Companyâ€•, and select the destination contact from the drop-down menu - This is the recruiter you want to keep.
- Click â€œCombine Recruitersâ€•.Â
- This process removes the old recruiter and moves over the job postings from the source company to the destination company.Â

Viewing Recruiter Detail ***Back to Top***

- From the main recruiter page, click on the recruiter's name.
- There are 2 tabs on this page:
- Profile - This tab displays the recruiter's details. Â The action toolbar includes print, email, add notes, delete, edit login, and change company. Activity Summary - This tab lists the activities the recruiter has performed.Â
  - This tab can be filtered to a specific date range

Changing a Recruiter's Company *Back to Top*

(If an employer has changed companies, the best practice is to have the reecruiter create a new account and select their new company when setting up their new account. This will leave all of the existing files and data for their original company intact. If an employer has selected the wrong company during the create account process, then it is best to change the company. This will move the recruiter and any jobs or visits that is attached to the recruiter record with them to the new company.)

- From the main recruiter page, click on the recruiter's name.
- Click on the â€œChange Companyâ€• icon.
- Enter the company's name, and click â€œFind Companyâ€•.
- If the company is located, select the company, and then click â€œSelect/Continueâ€•.
- If the company is not located, click â€œAdd Companyâ€•.

Editing a Recruiter Login Account ***Back to Top***

- From the main recruiter page, click on the recruiter's name.
- Click on the Profile tab.
- Click on â€œEdit Loginâ€•.
- You can disable a recruiter's account by clicking on the â€œDisable Accountâ€• button.
- From there you can change the username, reset the password, change the email address, make notes, and select the employer permission group.

Sign in as a Recruiter ***Back to Top***

- From the main recruiter page, click on the recruiter's name.
- Click on the Profile tab.
- Â In the upper right hand corner there is a â€œSign in as a Recruiterâ€• link.Â Click on this link and you will be able to see the system from that particular recruiter's view.
  - When signing in as a recruiter, GradLeaders Career Center Admins will not see the option to change the recruiter's password under Login Info. To manage a recruiter's account information, GradLeaders Career Center Admins are to use the Admin Module.
  - If the GradLeaders Career Center Admin have the option to sign in as the recruiter from the recruiter grid, this will log the admin into the Recruiter Module using a Job Board only URL. They will not have access to candidate searching. Signing in as a recruiter from the profile page will sign the admin into

the Recruiter Module using either the Job Board URL or the Resume & Job Board (or Combo) URL. The link used is determined as follows:

- If the recruiter does not have a subscription to a candidate resume book product, then clicking the link to Sign in as recruiter will log in them in using the Job Board only URL.
- If the recruiter does have a subscription to a candidate resume book, then the admin will see a drop-down menu when they hover over the Sign in as recruiter link that gives them the option for the Job Board (Job Board URL) or to the specific resume book which will log the admin in using the Combo link URL (Resume Book & Job Board).

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