# Hodes iQ 6 User's Guide 

last updated 5-2012
Table of Contents
Table of Contents ..... 2
Getting Started ..... 4
Getting Started (Common Terms) ..... 5
The Home Page .....  8
How to use My Goals ..... 9
How to use Quick Finders ..... 10
How to Navigate Hodes iQ ..... 11
The Navigation Bar ..... 11
Navigation Items and Definitions. ..... 12
Creating and Managing Jobs ..... 14
Create a New Job Posting ..... 14
Managing Jobs ..... 23
The Job Details Page ..... 25
Posting Finder ..... 29
About Questionnaires ..... 30
Create a Questionnaire Category ..... 31
Create New Questions ..... 32
Create New Questionnaire ..... 33
Managing Questionnaire Data ..... 37
Manage Questionnaires: View or delete questions. ..... 37
Manage Questions: View or delete questions. ..... 37
About Talent Pools ..... 38
Creating a Talent Pool Posting ..... 38
Managing Talent Pools ..... 38
Differences in the Candidate Detail Page for Talent Pools ..... 39
About Project Folders ..... 40
Working with Candidates ..... 41
Manage Job Respondents ..... 42
The Candidate Profile Page ..... 48
Using Candidate Finder ..... 51
The Hotlist ..... 51
About Talent Scout. ..... 55
CRM Functionality (Q-Campaigns) ..... 57
Latest Respondents ..... 63
About Sourcing Plans ..... 64
Creating A Sourcing Plan ..... 64
The E-media Library ..... 66
To submit an E-Media request ..... 66
About Job Templates ..... 68
Manage Job Templates ..... 69
Hodes iQ Tools ..... 70
Manage User Preferences ..... 70
Manage Response Information ..... 71
Hodes iQ Reporting ..... 72

## Hodes ©

## Getting Started

## To access Hodes iQ:

- Click on the following URL https://go6.hodesiq.com.


## To log in:

- Enter Company ID. This is a unique number assigned to each individual company.
- Enter Username. This usually consists of the first initial of the first name and the full last name.
- Enter Password.
- Click Login button.

iQ Tip: For security purposes, update your password on a regular basis and do not share your username and password with others.


## Getting Started (Common Terms)

Throughout the Hodes iQ application, there are common terms used. Below is a listing of those terms with definitions and commentary.

| Term | Description | Comment |
| :--- | :--- | :--- |
| Ad Hoc <br> Reporting | In addition to standard reports in the Reports <br> drop down, Hodes iQ provides a robust user- <br> controlled reporting environment. | Find this under the Reports menu. |
| E-media | E-media refers to outside job boards and other <br> electronic services that are integrated with Hodes <br> i. Users post jobs to E-media in Hodes iQ, <br> Hodes iQ delivers the job to selected E-media, <br> and responses are routed back to Hodes iQ by <br> the method the user chooses. | The term E-media may be used <br> interchangeably with Electronic <br> Sources and Job Boards. |
| Traditional <br> Media | Traditional Media is any non-electronic media <br> that Hodes iQ tracks for source reporting. | Traditional Media is added to the <br> "How did you hear about us? <br> dropdown list during implementation <br> and can be modified by Support. |
| Hotlist | The Hotlist is a user-specific list of candidate <br> responses. | Hotlisted candidates do not move <br> from the job or talent pool to which <br> they applied. |
| Job Posting | A Job Posting contains information about a a <br> position. Some of this information is displayed to <br> candidates. Some information is used internally. | In addition to job postings, many <br> clients also have Requisition <br> Approval functionality. Requisitions <br> use company specific information |
| and once approved, are extended |  |  |
| into job postings. |  |  |


| Question | Questions are used to build questionnaires. | Users create many questions, and then re-use them to make questionnaires. |
| :---: | :---: | :---: |
| Questionnaire | Questionnaires are a group of scored questions attached to a job posting. They are designed to be re-used on many job postings. | Questionnaires are a good way to quickly identify candidates who most closely match the qualifications for the job and/or candidates who are not qualified (knockouts). |
| Requisition | Requisitions use company specific information for workflow of routing approvals. Once approved, are extended into job postings. | Clients who have a requisition module will find Create Requisitions and Manage Requisitions under the Jobs menu. |
| Respondent | Respondents are individuals who have either submitted their interest to a job posting, a talent pool, or have been attached by a user. | The term Respondent encompasses the term Candidate and Applicant. Since Applicant has specific OFCCP implications, the term Respondent is used in places where the term Applicant is inappropriate. |
| SmartPost | SmartPost is a powerful sourcing tool that allows Hodes iQ users to post their jobs to their career sites and thousands of job boards from one sourcing page. SmartPost includes metrics that measure job/job board performance. | SmartPost may also be referred to as the sourcing page. |
| Sourcing Plan | Sourcing Plans contain re-useable user-defined bundles of E-media. For example a sourcing plan may have the corporate career site and all free sites. Once a sourcing plan is created, you can select them during the Create a Job process. | Sourcing Plans are found under the Sourcing menu and are shareable in a team. |
| Talent Pool | Talent Pools are postings that are not associated with an approved and open requisition. Often used for Evergreen positions or pre-recruiting activities. | Time to fill metrics and interview statuses do not apply to candidates in Talent Pools. |
| Talent Scout | Talent Scout uses powerful data mining techniques to let you search against a résumé or job description for matching candidates within your database. | Talent Scout "GO" links are integrated throughout Hodes iQ almost anywhere you see a job posting or a candidate. |
| Team | A Team is defined as a set of users who may share information about jobs and candidates. A user can be a member of one or many teams. | When a job posting is created, it can be assigned to a team or to the default team "My Jobs" |
| Goals | Seen on the home page, Goals keep track of recruiting goals and associated tasks. | Like project folders and the hotlist, goals are unique for each user and cannot be shared. |
| Tasks | Seen on the home page, Tasks are action items associated with Goals. | Use Tasks to track work items. |
| Ranking | A candidate can be assigned a rank based on | Ranking is specific to a candidate |


|  | either a user's subjective choice of Most <br> Competitive, Competitive, Unranked, Not <br> Competitive, Recycle for Different Position, or <br> Knockout. The rank of knockout can also be <br> automatically assigned by Hodes iQ based on a <br> questionnaire setting. | for a specific position. |
| :--- | :--- | :--- |
| Interview <br> Status | Used in the interview process, Interview Statuses <br> are company defined statuses indicating the <br> candidate's process through the hiring lifecycle. | Interview Statuses may have email <br> correspondence attached to them. |
| Knockout | A specific type of rank, knockouts are either <br> manually assigned, or system assigned using <br> questionnaire knockout assignments. | A candidate who has been knocked <br> out is still visible in candidate lists, <br> but marked as a knockout. |

## The Home Page

Hodes iQ's Home Page is personalized for the user logged in. The user's name and permissions-based role assigned will appear on the top green bar. The menu items available vary based on the user's role (either Recruiter or Recruiting Manager) and on the specific features enabled in the company's account.

The layout of the home page is divided into four sections:
Recruiter Activity Summary View the last 5 jobs you posted.

My Goals
Hodes iQ News
Quick Finders

Keep track of your recruiting goals and tasks.
Updates about the system.
Quickly locate either a specific candidate or a job.


## Hodes ©

How to use My Goals
This section of the home page allows a user to record two levels of task information. Recruiters can create goals and then create specific tasks related to those goals.


- Goals can be either "active" or "done".
- To create a new goal, enter the name of the goal in the "Add new goal" field and click the "Add" button.
- To add a task to a goal, click on the "active tasks" link on any goal.
- Goals have the following properties:
- Goal: Name of the goal.
- Priority: Defaults to Medium
- Started: Date the goal was created.
- Due: Date the goal should be completed.
- Completed: Defaults to No.
- Number of Active Tasks: Tasks associated with this goal.
- Click active tasks link to add tasks.
- Edit/Delete: Edit goal information or delete a goal. A goal will not delete if it has active tasks within it.
- Tasks are associated with goals. By clicking on the "active tasks" link, a user can view, edit, and add tasks.
- To add a task, type your desired task and click the Add button.
- To edit a task, edit the description, the calendar (by clicking the calendar icon), or mark the task complete. Click Update to save changes.


How to use Quick Finders
The Quick Finder option on the home page allows a user to look up a Candidate or a Job using basic criteria.

NOTE: Full Candidate and Posting Finders are available under the Responses and Job menus.
Quick Finder: Responses


Quick Finder: Jobs

advanced

## How to Navigate Hodes iQ

Hodes iQ uses a navigation bar, Action Buttons, search fields, and other graphic elements to guide users in initiating and completing tasks inside of the application. Generally, to initiate a new task, the navigation bar is used. To manipulate information (like a job or candidate), an Action Button is used. Below is an outline of how Hodes iQ uses these navigation tools to complete tasks.

## The Navigation Bar

The purple Navigation Bar contains five menus. By scrolling over each menu title, users are presented with a pull down of different menu options.

## To use the Navigation Bar:

- Scroll over any menu name.

iQ Tip: When displayed, use the 'back' and 'forward' Action Buttons within Hodes iQ to move to the previous or next page. Do not use the 'back' button found in the web browser when the 'back" button is available inside of iQ .

Navigation Items and Definitions

| Menu Section | Image of Menu Items | Description |
| :---: | :---: | :---: |
| Jobs | Manage Job Postings <br> Create New Job Posting <br> Posting Finder <br> Questionnaires <br> Manage Talent Pools <br> Manage Project Folders | View the list of open and closed positions and responses to those positions. <br> Create a New Job Posting. <br> Find job postings by job title, job number, etc. <br> Create and edit questionnaires. Also navigation to create and edit questions. <br> View the list of open and closed Talent Pools and responses to those postings. <br> View and manage Project Folders. |
| Responses | Hotlist <br> Talent Scout <br> Manage Saved Searches <br> Candidate Finder <br> Latest Respondents | Maintains a user-created list of candidates for easy access. <br> Search the company database for candidates, using Artificial Intelligence. <br> Access saved Talent Scout search criteria for reuse. <br> Find a specific candidate by First Name, Last Name, etc. <br> Review a list of candidates statused as "New Candidate" within a date range. |
| Sourcing | Manage Sourcing Plans <br> Create Sourcing Plan <br> E-Media Library <br> E-Media Request | View and delete saved Sourcing Plans. <br> Create a saved list of job boards to be re-used by a user or team. <br> Search for specific job boards supported in Hodes iQ. <br> Submit requests for unsupported job boards in Hodes iQ. |


| Reports | Open Jobs <br> Candidates Hired <br> Respondent Activity <br> Job Time To Fill <br> Candidate Pipeline <br> Response Ratios <br> Source Effectiveness <br> Sourcing Activity <br> Career Site Performance <br> EEO <br> Employee Referral <br> Ad Hoc Reports... <br> More Reports... | View open jobs by Team. <br> View candidates hired within a date range and by Team. <br> View candidate status changes within a date range and by Team. <br> View days to fill within a date range. <br> View the status of candidates within a date range and by Team. <br> View the ratios of candidates in each status to hire. <br> View the number of candidates by status and source. <br> View a list of job boards to which recruiters have posted within a date range. <br> View the number of Applies and Tell a Friend by posting within a date range. <br> EEO (optional): EEO-1 Type, EEO Candidate Flow, and EEO/AA Candidate List. <br> Employee Referral Reports (optional). <br> Pops up a window for the ad hoc reporting tool. <br> More Reports (optional) Houses other custom reports developed for a client. |
| :---: | :---: | :---: |
| Tools | Manage User Preferences Manage Response Information <br> Manage Job Templates <br> Create Job Template <br> More Tools... | Update user information, account settings, and user password. Enter/update contact information to be sent to outside E-media. <br> View, edit or delete a job template. <br> Create and save a job template for re-use. <br> Other tools are available here including expense tracking options. |

## Creating and Managing Jobs

In this section, we will explain how to:

- Create a New Job Posting
- Post a Job to Your Corporate Career site and outside E-media
- Manage Your Job Postings
- Edit a Job Posting
- Create and edit a Job Template
- Create and edit Questionnaires

Create a New Job Posting
There are three steps in creating a new job posting:
\(\left.$$
\begin{array}{|c|}\hline \begin{array}{c}\text { Step 1 } \\
\text { Set template, } \\
\text { custom fields, } \\
\text { team and create } \\
\text { the body of the } \\
\text { posting }\end{array}\end{array}
$$ \rightarrow \begin{array}{|c|c|}\hline Step 2 <br>
View <br>

electronic sources\end{array}\right) \quad\)| Step 3 |
| :---: |
| Review <br> and <br> and your job |
| launch |

iQ Tip: Prior to creating a job posting for the first time, users may want to create a Job Template and/or a Questionnaire. (See About Job Templates and About Questionnaires sections for instructions).

## Hodes ©

Step 1: Set template, custom fields, team and create the body of the posting

- On the Navigation Bar, scroll over the Jobs menu item.
- Choose Create New Job Posting.
- The following screen will appear:



## Explanation of Fields

- Select a Team: Assigns the job to a specific team. The job will be visible on that team view in the Manage Job Postings section.
iQ Tip: When posting a job, assign it to a Team. This will allow other recruiters on the Team to view the job and responses.
- Choose Posting Type: Job Posting or Talent Pool Posting. By selecting Talent Pool posting, recruiters cannot status a candidate unless they are transferred to a job posting.
- Corporate Site Category: The category candidates will search on the career site.
- Choose a Questionnaire Category: Questionnaires are organized into categories for ease of access. Select this to display a list of questionnaires in the next field.
- Choose a Questionnaire: Assigns the questionnaire that will be attached to the job.
iQ Tip: Click on the magnifying glass icon to view the content of a questionnaire.
- Primary Response Type: Defaults to Via Web site. Changing this setting impacts jobs posted to outside E-media. If users would like candidates NOT to apply through the Hodes iQ corporate career site portal, select Via Email, Postal, Phone, or Fax.
- Select a Sourcing Plan, if applicable.
- Choose Job Template, if applicable.
- Custom fields are displayed below Choose Job Template if applicable.



## Explanation of Fields

- Job Posting Number: Hodes iQ automatically assigns a job number to each position. This can be edited by the user to a different set of alphanumeric characters to a maximum of 15 characters.
- Job Posting Title: Enter the title of the job posting.
- Industry: Select the primary industry to which the company belongs. Then from the sub-list, highlight an industry that is as close as possible to the business. This controls the suggested E -media shown on the next page and how the job is characterized on E media.
- Function: Select the primary function of the position. Then from the sub-list, highlight a more specific function. This controls the suggested E-media shown on the next page and how the job is characterized on E-media.
- Job Posting Type: Select appropriate option.
- Pay Type: Select appropriate option.
- EEO Category (if EEO enabled): Select appropriate option.
- Education: Minimum required for the job, used for E-media only.
- Years Experience: Minimum required for the job, used for E-media only.
- Job Level: Select appropriate option, used for E-media only.
- Keywords: Enter keywords related to the posting. These words are used to match the posting with recommended job board packages.
- Part Time/Full Time: Select appropriate option, used for E-media only.
- Number of Openings: Select number of openings associated with the posting, used for E-media only.

The following fields define the location of the job. Hodes iQ categorizes jobs by their Country, Region (or Province or State), and City as a basic requirement. This categorization is used by external E-media to post the position. After selecting a country, a region/province/state drop down will appear. After making that selection, the city field will appear.


- Country: Select appropriate country
- Region/Province/State: Select appropriate option.
- City: Select appropriate option (field appears when State is selected).
- Postal Code: Enter the Postal Code for the job location (optional).
- Street Address: Enter the street address for the job location (optional).

IQ Tip: If the job has no defined location, enter a country, state, city combination. Then, in the body copy of the position indicate the location options open to the candidate. These instructions will appear on the corporate career site and any outside job boards.

- Opening, Job Description, Additional Requirements, Closing: Enter the job description information to be included in the posting. Hodes Q Q supports these four fields for a job description to allow users to more precisely manage opening/closing language (see About Job Templates).

The content in each of these sections displays on the career site and on job boards. Hodes iQ supports plain text and HTML formatting of job descriptions. E-media will vary in their support of HTML. We recommend using simple HTML features (bold, font, italic). Theses sections will support direct HTML by clicking the <> button, however, JavaScript, style sheets, and font controls embedded in <div> and <p> tags are not supported.

- Add formatting to the posting using a rich text editor.
- Cut and paste from Word or HTML documents or use the HTML toolbar.

Opening


Hodes iQ supports rich text like bold and underlined text.
It also supports altemate fonts, colors, and SiZeS.
You can use bullets

- to
- make
- your
- job
- stand
- out.
|t also has a spel cheker...

| Design |
| :--- | :--- |$>$ HTML Preview $\quad$.

iQ Tip: Hodes iQ natively supports basic HTML formatting on career sites. If your corporate standards prohibit this, please contact Hodes iQ Support.

- Advanced (link): Exposes additional fields including Compensation Information, Paid Relocation, Travel Percentage, Internal Description and Billing Memos. These fields are generally not used on corporate career sites, but are used for E-media and for invoicing purposes.
- Company Name to Display. Hodes iQ supports the ability to display an alternate company name on E-media, which is useful for multi-business unit organizations, subbrands, etc. Whatever company name is written here will display on the job posting on E-media. If this field does not pre-fill in on a user account, edit Tools $\rightarrow$ Response Information and set the appropriate company name.
- Email Address. Some external sites require an email address even if it is not published externally. If this field does not pre-fill in on the user account, edit Tools $\rightarrow$ Response Information and set the appropriate company name.
- Apply Online URL. This field should be automatically pre-filled in and non-editable. If it is editable (based on a company setting), we do NOT recommend users change this field. Instead, contact Hodes iQ Support for instructions.
iQ Tip: Review the following information before clicking Next. Users will not be able to edit the job number after moving next. After a job is launched, the following fields are not editable:
Click Next to Continue to Step 2



## Step 2: View Electronic Sources

Hodes iQ supports thousands of E-media, including Hodes iQ-powered corporate sites, niche boards, diversity boards, industry associations, local sites, College and Alumni sites, and general job boards. To assist users in selecting the appropriate job sites, this page makes active recommendations of the job based on the job's industry, function, location, job level, job type, and more.

The features of this page include:

View Electronic Sources
Select e-Sources for Project Manager (326706)


An information area with four tabs detailing the shopping cart, errors, and more.


Specials Info Sourcing Plan Sourcing History
Focused Packages
(1) $\begin{aligned} & \text { CareerBuilder - HotJobs Value } \\ & \text { Package }\end{aligned} \$ 675.00$

国 CareerJournal-CareerBuilder Value
Package
$\$ 675.00$
(1) Monster-CareerJournal Value Package $\$ 745.00$

Premium Packages



To select E-media to send the job to:

- Click the check box to the left of the E-media name.
- Once E-media have been selected, click Save.


## About the Information Area Tabs

- Specials: Shows E-media specials with discounts for users.
- Info: Displays information and warnings if there is a problem with the posting including:
- Details of a particular E-media.
- A mistaken job board selection when a subscription is available.
- An expired subscription.
- A job description exceeds a specific job board requirement.
- The job will be posted twice to the same job board.
- Sourcing Plan: As selections are made, the job cart tab is updated with the E-media name and cost.
- Sourcing History: Displays any previous E-media to which this job has been posted.

| Specials | Info Sourcing Plan | Sourcing History |
| :---: | :---: | :---: |
| Electronic Media |  |  |
| Primary Sources : 3 |  | ffiliate Sources: 1 |
|  | TYPE | COST |
|  | PusSearch.com Nich | Sites $\quad \$ 65.00$ |
| -ifi WebAnalystJobs.com Nich |  | Sites $\quad \$ 125.00$ |
| 宜 Mons | $\begin{array}{ll}\text { com } & \begin{array}{l}\text { Fee } \\ \text { Sites }\end{array} \\ \end{array}$ | Based $\quad \$ 0.00$ |
|  | $2$ | To remove E-media from the cart, click on the trash icon. |
|  | Total Cost (Pen | ding): $\quad \$ 190.00$ |

## Explanation of Electronic Sources

- My Career Sites: A list of the Hodes iQ hosted Career Sites. Includes the corporate career site, and if applicable, the Employee Referral, Internal Mobility and Agency sites.
- My Subscriptions: A list of E-media to which a user has access to a contract. Shows the contracted inventory as well as a count of depleted inventory.
- Favorites: A list of E-media previously used. If the E-media is shaded, then it is not available for the type of posting being managed.
- State and Equal Opportunity Job boards (if applicable): Used for clients who are required to meet OFCCP Federal Contractor requirements.
- Free Sources and iQ Values: A list of free job boards for posting. Some of these sites are specially contracted by Hodes iQ to provide a free posting to our clients only.
- Local Market Job boards: A list of job boards based on the location of the job.
- Industry Associations: A list of industry association job boards that may be appropriate for the job.
- Niche Job boards: A list of niche sites related to the Industry, Function, and Keywords selected for the job.
- Diversity: A list of E-media focused on diversity recruitment.
- College and Alumni Job boards: A list of sites focused on college and alumni recruiting.
- General Job Boards: A list of general interest career job boards.
iQ Tip: If your company has a contract with a particular job board, that E-media will be unavailable for selection in the fee based sections.

Click the Save button to move to the next screen and finish the job posting.
Step 3 (Job Detail Posting Summary)

| Step 1 <br> Set template, <br> custom fields, <br> team and create <br> the body of the <br> posting |
| :---: | :---: | :---: |

Users will see their job saved with the E-media selected and destined for outside job boards. The job will not appear on any site (including the corporate career site) without hitting the launch button. Once launched, the posting will appear on the career site in near real time and is put in a queue for delivery to the job boards. Most postings appear on outside job boards within 24 hours. Actual appearance of the job on a specific job board will vary depending on the job board's own process.

## IMPORTANT NOTE: To send posting to the career site and selected job boards the launch button must be clicked on this screen!

If you see this warning the job has not been launched.

Job Detail Posting Summary
View Job Posting Details

Job Posting Title:
Job Location:
Job Posting Number:
Q-Code:

Created Date:
EEO Category:
Career Site Category:
Job template:
Hiring Manager:

## Workflow:

Questionnaire:
finance Person
Alpha, MI
362546
362546
11/22/2008
TestEE
Business Development
Not Specified
Not Specified
Not Specified
Not Specified


Apply Online URL: http://aasf.asfs.com
$\triangleright$ The Talent Scout has found 0 respondent (s) that match your job description.

EDIT SEARCH


COMMENTS CLOSE JOB LAUNCH
-
$\sqrt{\square 1}$

| $\triangleright$ Primary Response Details: |
| :--- |
| Company Name: Fres |
| Contact Name: |
| Response Type: Via Web Site |
| Apply Online URL: |
| http://aasf.asfs.com |

VIEW KEYWORDS

Modes iQ
ENTERPRISE
iQ Tip: Before launching the job, consider emailing this page to a manager for review using the Email button.

## Managing Jobs

Users who wish to manage, edit, copy, or close a job will want to use the Manage Job Postings feature. This is one of the most frequently visited views of job information. It can be accessed from the Jobs menu (Jobs $\rightarrow$ Manage Job Postings) and from the home page in the "Show Me" drop down item.


## Page Features

- Each column header with an underline is sortable by that column. Clicking the column once will sort in alphanumeric order ascending (A to Z), and by clicking on it again, descending (Z to A).
- To visit job posting information, click on any Job Posting Title link.
- To view responses since the user has last logged out, click the number in the "Since Last Logout" column.
- To view responses for a job in arriving in the past 24 hours, click the number in the "Last 24 hrs" column.
- To view all responses for a job, click the number in the "ALL" column.
- To auto-search the job description against resumes in the database, click the Talent Scout "Go" link.
- The Hide column indicates if the job has been hidden from the corporate career site.
- The Urgent column indicates if the job has been marked urgent, and is a candidate for the "Hot Jobs" feature on the corporate career site.
- The Launched column indicates if the job has been launched to the corporate career site or E-media. The sourcing button is a shortcut to the View Electronic Sources page for that job.
- Open indicates the date the job was opened and how many days it has been open.
- Select the desired jobs to manage by checking the box(es) in the far right column.


## Filtering Job Postings on the Manage Job Postings Page

At the top of the Manage Job Postings page is a filter to allow users to view open jobs, closed jobs, launched jobs, and more. Results may be filtered by these criteria:


- Use the Teams drop down to change the view to jobs attached to another team a user may be a member of. If the user is not a member of a team, it will not show up on this list. Multiple teams can be chosen here.
- Use the Job Posting Type drop down to view only jobs that have been launched to Emedia and those that have not.
- Use the Job Posting Status drop down to view open or closed jobs.
- Click the Filter icon to show the new list of jobs.


## Action Buttons:

- Create Job: Begins the Create Job Posting process.
- Add Folder: Add selected jobs to a Project Folder.
- Hide/Unhide: Hide or Unhide selected jobs from the Hodes iQ-powered main corporate career site. (To unpost from another Hodes iQ-hosted career site, using the unpost feature.)
- Refresh: Refresh the posting date for selected jobs on the corporate career site.
- Urgent: Add selected jobs to the Hot Opportunities list on corporate career site.
- Close Job: Close selected jobs. The posting is removed from the career site in almost real time and is put in a queue to be requested for removal from the job boards.
iQ Tip: Users can remove a posting from a specific career site (ERP/IMS sites, Agency sites) without removing it from the main career site.

From Manage Job Postings, click the Job Posting Title
Click Sourcing Details in the top gray box to the right.
Click Unpost E-media for the site that should have the job removed.

The Job Details Page
How to view the details of a job posting:

- From the Navigation Bar, scroll over the Jobs.
- Choose Manage Job Postings.
- Click on the desired Job Posting Title.

iQ Tip: Provide the Q-Code number to Support when contacting them with questions related to the posting.


## Features available on this page

- Questionnaire
- View: Displays the questionnaire and questions currently being used.
- Edit: Edits the questionnaire tied to this job posting. Editing a questionnaire here does not update the version found in Manage Questionnaires.
- Change: Change the questionnaire associated with this job posting.
- Latest Comment: View the most recent comment added to this job.
- Response Summary link: Click this link to see a summary of candidates currently in each interview status.
- SmartPost Media Tracker link: Click this link to see a dashboard for this specific job; see which E-media are more effective.


## Hodes ©



- Sourcing Details link (Source Summary): Click this link to view job boards selected, posting status, days to expiration and date launched.
- Unpost the job from a specific career site or job board by clicking Unpost in the Unpost E-media column.
- Users may unpost jobs to external E-media (which will vary on their time to fulfill on the request) or to Hodes iQ-powered sites, which will be fulfilled in near realtime.

- Additional Expenses: Hodes iQ can track expenses at the job and the candidate level. Click this link to track expense items on a job. Note that any job sent to an E-media inside of Hodes iQ with a cost attached to it is automatically tracked in a separate area of the job detail page.



## Explanation of Fields

- Expense Category: A company-defined classification of the expense. (Access to Add New Categories is available to users with the Recruiting Manager role.)
- Add Expense Category:
- Click "Add New Category" below Expense Category field.
- Type in category name and description
- Click Save
- Expense Amount: The monetary value of the expense.
- Currency Type: A list of the ISO currency codes. It will default to the last used currency in expense reports.
- Expense Date: Date of the incurred expense.
- Expense Code 1: A user defined code, generally used for reporting (optional).
- Expense Code 2: A user defined code, generally used for reporting (optional).
- Expense Comment: A comment associated with this expense (optional).
- Click the Save button to save an entry and add more expenses.
- Click the Back button to return to the Job Detail Posting Summary page.


## - Talent Scout Box

- Click the number of respondents to see a list of candidates that match the job description. (See About Talent Scout for more information).
- Edit Search: Click this link to modify the criteria used in this search.
- View Keywords: Click this link to see the keywords found in the posting.
iQ Tip: Use the Keywords screen to create a search string in a job board resume database search.


## Action Buttons:

- Comments: View or add comments to the job.
- Close Job: Close the job. The posting is removed from the career site in almost real time and is put in a queue for removal from the job boards. Actual removal of the job on a specific job board will vary depending on the job board's own process.
- Launch: Launch the job. The posting appears on the career site in almost real time and is put in a queue for delivery to the job boards. Actual appearance of the job on a specific job board will vary depending on the job board's own process.
- Attach: Manually attach a candidate's profile to the job.
- Edit: Edit the job.
- Sourcing: View and select job boards.

NOTE: If a job is already launched, saving new job board selections automatically puts the job in a queue for delivery. It is not necessary to launch the job again.

- Email: Email the job posting description and sources selected for review.
- Copy: Copy the job and follow the steps in Create New Job Posting.


## Posting Finder

The Posting Finder assists users in locating one or many job postings and their associated candidates. It can locate both open and closed jobs, by team, and by date. To access Posting Finder:

- From the Navigation Bar, scroll over Jobs.
- Click on Posting Finder.



## Explanation of Fields

- Search Type: An Exact Match will look for every character in each field. Begins With will look for values that begins with the characters provided.
- Job Posting Type: Filters results on All, launched or unlaunched jobs.
- Search dates from: Select the time frame in which the job was posted.
- Job Posting Number(s): Enter the Job Posting Number. If searching multiple jobs, separate numbers by a comma.
- Keyword(s): Search for words found in the opening, job description, additional requirements, and closing fields.
- Job Title: Searches the text of job titles.
- Country, City and State: Search by using the location of the job posting. An "All Countries" value is available on this list.
- Max Return: Select the maximum number of results to display.
- Type of Posting: Filters out jobs by their markings as Job Postings or Talent Pools.
- Click Next.
iQ Tip: By default, search results display open jobs. If you do not find the job you are looking for, filter on closed jobs in the top right corner.


## About Questionnaires

Questionnaires are used to pre-qualify candidates during the initial apply process. Questionnaires are designed to help recruiters focus on the candidates who most closely match the requirements of the organization or the job.

Questionnaires are divided into two structures: Questions and Questionnaires. Questionnaires are composed of a series of questions asked, and scored. Questions within Questionnaires can be set as knockouts/required/preferred criteria.

When a questionnaire is selected on Create Job Posting, a copy of the questionnaire is made and attached to the job. When editing a questionnaire in the Questionnaires menu section, it does not change the copy made on any one job. When editing a questionnaire on a particular job, it does not change the original in the Questionnaires menu section.


## Create a Questionnaire Category

Questions and questionnaires can be grouped into categories for easy reference while creating questionnaires and selecting questionnaires in the Create Job Posting (step 1) process. To create a Questionnaire Category:

- From the Navigation Bar, scroll over Jobs.
- Scroll over Questionnaires.
- Select Create New Questionnaire Category.
- Enter the Category Name.
- Enter a description of the questionnaire category.
- Click Save.

| Jobs \| Responses | Sourcing | Reports | Tools |
| :---: | :---: | :---: | :---: |
| Manage Job Postings <br> Create New Job Posting <br> Posting Finder |  |  |  |
| Questionnaires | Manage Questionnaires Create New Questionnaire |  |  |
| Manage Talent Pools |  |  |  |
| Manage Project Folders | Manage Questions <br> Create New Questions |  |  |
|  | Manage <br> Create N | stionnaire <br> Questionna | gories <br> Category |

iQ Tip: Categories help users organize questions and questionnaires for easier reference.

## Create New Questions

- From the Navigation Bar, scroll over Jobs.
- Scroll over Questionnaires.
- Select Create New Questions.
- Enter new question.
- Select a category for this question.
- Choose an answer type from the pull-down menu.
- Drop Down List: Allows candidates to select one answer from a drop down list.
- Multiple Drop Down: Allows candidates to select more than one answer from a drop down list.
- Check Box: Allows candidates to check more than one answer.
- Yes/No: Allows candidates to select yes or no.
- Text Box: Allows candidates to enter a short fill-in answer (not scored).
- Text Area: Allows candidates to enter a long fill-in answer (not scored).


Enter Question Text and Select Answer Type

```
Enter the new question
Questionnaire Category
Uncategorized
Career Fairs
Casino questionnaire
Choose an answer type
Drop Down List
Select the number of answers
    2 v
```

- Click Next.
- Create as many questions as needed for the new questionnaire.
iQ Tip: Review this page for accuracy before clicking Next .


## Create New Questionnaire

Before creating a new questionnaire, examine existing questionnaires. There may be a questionnaire already created with the needed criteria. To create a new questionnaire:

- From the Navigation Bar, scroll over Jobs.
- Scroll over Questionnaires.
- Select Create New Questionnaire.


## Step 1 - Name and description

- Enter New Questionnaire Name.
- Select a category for this Questionnaire.
iQ Tip: Add a questionnaire to multiple categories by holding the "ctrl" key and select those categories.
- Enter a description (for reference only - optional).

- Click Next.


## Step 2 - Add Questions

- Select a question category to display a list of questions from which to choose.
- Select a question to add to the questionnaire.
- Click Add Question button.
- To remove a question, click "Minus Question" in the lower right hand corner.
- Repeat until all desired questions are added.


Choose a question and click on the magnifying glass to view the answers
Are you authorized to work in the United States?


- Click Next.
iQ Tip: To see the content of a question, use the drop down list of questions at the bottom of the page and click on the magnifying glass.

Step 3 - Reorder Questions (if necessary)

- Select a question.
- Click Move Up or Move Down.


Create Questionnaire: Step 3
Add Questions
Question list:
Are you authorized to work in the US?-Yes/No Question
Are you willing to relocate?-Yes/No Question


- Click Next.

Step 4 - Assign Answer Values (See How to Build Great Questionnaires for tips on scoring in the Help Center)

- Require an Answer: Check this box if candidates must answer this question.
- Score: Assign a value for each answer.
- Knockout: Click this radio button if by giving this answer, a candidate would not meet one of the minimum requirements of the job. NOTE: Candidates who answer a question indicated with a knockout are automatically assigned the rank of Knockout.
- Required: Click this radio button if this answer is a requirement for the job.
- Preferred: Click this radio button if this answer is preferred, but not required.
- N/A: Click this radio button if the answer is neither preferred nor required.

- Click Next .

Step 5 - Proof the questionnaire

- Go Back or Save.


## Managing Questionnaire Data

Questionnaire and question data may be deleted or manipulated. When deleting questions or questionnaires, it will NOT delete this information attached to job postings.

Manage Questionnaires: View or delete questions.

- Select Jobs, and then Questionnaires
- Select Manage Questionnaires
- Delete or Edit a questionnaire one at a time.

| Jobs \| Responses | Sourcing | Reports | Tools |  | Logged in: Hodes iQ (Recruiting Manager) \| Home | Help Center | Loo Out |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Manage Questionnaire <br> Please select the Questionnaire you wish to manage. | CATEGORY <br> View All $\quad-$ |  | FILTER: |  | $\begin{aligned} & \text { PAGE: } \\ & 1 \text { of } 1 \end{aligned}$ |  |
| \# Questionnaire Name |  | Description |  | Date Created ${ }^{\text {d }}$ | 7 - |  |
| 1. Transporters |  |  |  | 7/30/2010 | $\Gamma$ |  |
| 2. PT/OT |  |  |  | 7/30/2010 | $\Gamma$ |  |
| 3. Nurse Aides |  |  |  | 7/30/2010 | $\Gamma$ |  |
| 4. RNs | test |  |  | 7/30/2010 | $\Gamma$ |  |
|  |  |  |  |  | $\begin{aligned} & \text { PAGE: } \\ & 1 \text { of } 1 \end{aligned}$ |  |
| Hodes <br> ENTERPRISE 0 |  |  |  |  |  | $(1 / 1)$ |

Manage Questions: View or delete questions.

- Select Jobs, and then Questionnaires
- Select Manage Questions
- Delete a question one at a time.



## About Talent Pools

Talent Pools are postings that are not associated with an approved and open requisition. Often used for evergreen positions or pre-recruiting activities, Talent Pools allow users to build a pipeline of talent before a requisition is opened. Talent Pools look and act similarly to Job Postings to outside candidates; they have descriptions, can be posted to E-media, and can be applied to.

There are three differences in the behavior of Talent Pools vs. Job Postings for HR users:

- Candidates who apply to Talent Pool Postings are not reviewed in the same section as candidates who apply to Job Postings. To review candidates who have applied to Talent Pools, visit the Jobs $\rightarrow$ Manage Talent Pools menu item.
- Candidates who apply for Talent Pool postings may not be statused in an interview status. While they can be ranked, since Hodes iQ assumes that a Talent Pool posting is not a live, open job, interview statuses do not display on the Candidate Profiles within Talent Pools.
- On standard reports for open positions and time to fill, Talent Pool postings are not automatically included. Since they are assumed not to be open positions, the record is not counted against time to fill reports for recruiting, etc. Talent Pool data are reportable fully in the ad hoc reporting environment.


## Creating a Talent Pool Posting

To create a Talent Pool instead of a Job Posting, users should set the Choose Posting Type field in Step 1 of Create Job Posting to the value of Talent Pool Posting.

Create New Job Posting
Choosing Job Posting Options


## Managing Talent Pools

- Click on the Jobs Menu
- Click on the Manage Talent Pools Menu


## Hodes ©

The Manage Talent Pools page behaves in most regards in the same way that the Manage Job Postings page behaves. Talent Pool postings may be edited just like Job Postings, and Candidate Responses may be viewed in exactly the same way.

You can choose multiple teams here.


## Differences in the Candidate Detail Page for Talent Pools

On the Candidate Detail page for Talent Pools, users are able to manipulate candidates in the same way as on a Job Posting with the following two exceptions: Interview Statuses and Not Selected Reasons are not available.


About Project Folders
Project folders allow users to "bookmark" responses or jobs in recruiter-defined folders. This may be useful for things like making lists of candidates with interesting skills or making lists of jobs for a special project like a job fair. To use Project Folders, go to:

- The Jobs menu item
- Select Project Folders

| Jobs \| Responses | Sourcing | Reports | Tools |  | Logged in: Hodes iQ (Recruiting Manager) \| Home | Help Center | Loo Out |
| :---: | :---: | :---: |
| Manage Project Folders <br> Please select the Project Folders you wish to manage. <br> Project Folder Name $\triangle$ |  | $\begin{aligned} & \text { PAGE: } \\ & 1 \text { of } 1 \end{aligned}$ |
|  | Date | $\square$ |
| 1. Accounting | 8/15/2007 | $\Gamma$ |
| 2. September Job Fair | 7/30/2010 | $\Gamma$ |
| 3. West Coast Sales | 7/30/2010 | 「 |
|  |  | $\begin{aligned} & \text { PAGE: } \\ & 1 \text { of } 1 \end{aligned}$ |
| Hodes (iQ enterprise (0) |  |  |

- To Create a new folder, click the "Create Folder" button.
- To view a folder, click on its Project Folder Name.


## Hodes ©

## Working with Candidates

In Hodes iQ, users can access candidate responses through several methods that include viewing candidates by the job that they have applied for (Manage Job Respondents), viewing candidates in batches (ResumeRemote), viewing candidates by their contact information (Candidate Finder), using Hodes iQ's concept based search (Talent Scout), viewing candidates who are in New Candidate status (Latest Respondents), or user-defined lists (Hotlist).

Users can present candidates to others for review in three ways: a link to SmartView for managers who want to see selected candidates, attached resumes for managers who want to review only the documents, or via a notification email for those managers who have a log in to iQ.

In this section, moving candidates through the interview process will be covered, as well as methods of locating candidates, and using batch operations to update candidate status information.

## Manage Job Respondents

- From the Navigation Bar, scroll over the Jobs menu item.
- Select Manage Job Postings.
- Click on a number in any of the response columns
- Since Last Logout (for candidates who have arrived since user last logout)
- Last 24 Hours (for candidates who have arrived in the past 24 hours)
- All



## Using the Filter Feature

Candidate lists display 25 records per page. Sometimes it is helpful to shorten the list of candidates for faster review. A filter is available to narrow down the candidate list using several criteria.

- Keywords: Will search candidate resumes for the specific keywords specified.
- Search Options: Will look for the keywords in the resume, the comments or in the answers to a questionnaire.
- Archive: Will return only candidates who are Active or Archived.
- Status: Will return candidates who are currently in a specific interview status. Users may select either a single interview status, or, by clicking the multiple box, multiple interview statuses.

Click the Filter icon to change the results of the candidate list.

Information on the Manage Job Respondents page includes:

- Name: Candidate's name.
- Home Phone: Home phone number provided by the candidate.
- Location. City and State provided by the candidate.
- Status: Current interview status of the candidate.
- Date of Response: Date the candidate applied.
- Score: The candidate's scored results of the questionnaire (if applicable).
- Ranking. Current rank of the candidate.
- Comments. Indicates whether comments are associated with the candidate.
- Source: Source code for the candidate.
- Talent Scout "Go": Search the database for candidates who match concepts within this candidate's resume.
- The Document Icon: Pops up the candidate's resume in a new window.
- Check Box: Works in conjunction with Action Buttons. Select one or many.


## Action Buttons:

- Q-Campaign: Send an email campaign to lists of candidates.
- Print: Print resumes and questionnaire results (if applicable) for selected candidates.
- Batch: Perform actions on several candidates at the same time.
- Change Rank, Reason and Status
- Add a comment
- Save changes
- Add Folder: Add candidates to a project folder.
- Remote: Quickly review candidate information and take action.
- Archive: Remove candidates from view on this list.
- Transfer: Transfer candidate(s) to another job.
- Hotlist: Add candidate(s) to a list for future reference.
- Submit Candidate: Makes this candidate viewable by the applicable hiring manager
- Email: Allows for either SmartView, attached documents or notifications to be sent.
- Back: Go back to the previous page.


## Using Resume Remote

Resume Remote allows users to quickly review, sort, comment, and route candidates to hiring managers in one window.

- From the Manage Job Respondents page, check the checkbox to the right of each candidate to review.
- Click on the Remote Action Button.

The Resume Remote has three sections.


## Action Buttons:

- Schedule: Creates a meeting request calendar file locally on the user's computer. The file will have some information about the candidate pre-filled in the meeting request.
- Print: Print resumes and questionnaire results (if applicable) for selected candidates.
- Email: Allows for either SmartView, attached documents or notifications to be sent Hotlist: Adds this candidate to a hotlist.
- Submit Candidate: Makes this candidate viewable by the applicable hiring manager
- Next/Save: Moves Resume Remote to the next candidate. If the user is on the last resume to be viewed, the Save button will appear. Click this button to save any changes.
- Cancel: Close Resume Remote without saving any changes.


## Transferring Candidates

Transfer candidate(s) from one job posting and/or talent pool into a different job posting and/or talent pool. To begin, select candidates using its check box and click the transfer button. The transfer function will allow up to 25 movements to occur. Users may move 25 candidates to a single job ,5 candidates into 5 different jobs, or any other combination under 25 transactions.


## Transfer Respondent(s) - Step 1:

- This step uses fields similar to the Posting Finder. Enter search criteria:
- Search Type: Select Exact Match, Contains or Begins With from the drop down.
- Job Posting Type: Filters "All", launched or unlaunched jobs.
- Search dates from: Select the time frame in which the job was posted.
- Job Posting Number(s): Enter the Job Posting Number. If searching multiple jobs, separate numbers by a comma.
- Keyword(s): Search for words found in the opening, job description, additional requirements, and closing fields.
- Job Title: Search for job titles. Be sure to use the 'contains' filter in search type when searching on job title.
- Country, City and State: Search by using the location of the job posting.
- Max Return: Select the max number of results to display.
- Type of Posting: Select Job Postings or Talent Pools.

- Click Next


## Transfer Respondent(s) - Step 2

- Select the job(s) - or talent pools(s) to transfer the candidate.

- Click Next


## Transfer Respondent(s) - Step 3

- Select the "Leave a copy" checkbox to leave a copy of the candidate's profile in the original job posting or talent pool.

- Click Save


## Transfer Respondent(s) - Step 4

- Click on the candidate's name in the new job to view their new Candidate Profile.
- If the candidate is already attached to the position, Hodes iQ will indicate an error but still proceed with the other transfer requests.

Your request produced the following results:
3 of 6 transactions succeeded ( 3 failed).

## Transfer Respondent(s): Step 4 of 4

See Status column for results of each transfer. Failed transfers show error status in red. You can click on any
respondent or job posting below to be taken to that record.

| \# | Originating Respondent Record | Originating Job Posting or Talent Pool | New Respondent Record | Target Job Posting or Talent Pool | Status |
| :---: | :---: | :---: | :---: | :---: | :---: |
| 1 | Harold, Rob | 319217 Assistant Store Manager | Harold, Rob | 319217 Assistant Store Manager | Previously attached/transferred. |
| 2 |  |  | Harold, Rob | $\begin{aligned} & 319214 \text { Registered } \\ & \text { Nurse } \end{aligned}$ | Transferred. |
| 3 | Orr, Bruce | 319217 Assistant Store Manager | Orr, Bruce | 319217 Assistant Store Manager | Previously attached/transferred. |
| 4 |  |  | Orr. Bruce | $\begin{aligned} & 319214 \text { Registered } \\ & \hline \text { Nurse } \\ & \hline \end{aligned}$ | Transferred. |
| 5 | Mcgreevy, Dennis | 319217 Assistant Store Manager | Mcgreevy, Dennis | 319217 Assistant Store Manager | Previously attached/transferred. |
| 6 |  |  | Mcgreevy, Dennis | 319214 Registered Nurse | Transferred. |

## The Candidate Profile Page

The Candidate Profile page is the definitive page to reference information on a candidate and to manipulate that candidate. A candidate can be moved through the interview process, the candidate's contact information can be edited, history of this candidate on this job, comments, and view activity on other jobs applied to can be viewed.

- From the Manage Job Respondents page, click on the candidate's name.


The Candidate Profile page is divided into two sections.

Section 1：Located on the left side of the page．
－View respondent contact information．
－Send an email to the candidate．
－View Source．
－Edit Contact Information．
－Update all contact information．
－Update source．
－View Latest Comment．
－Add a Comment．
－View Respondent documents．
－Add／View Additional Respondent Expenses．
－Respondent History of Correspondence．
－View questionnaire results（if applicable）．
－View other positions to which the candidate applied．

| Ranking： |  |
| :---: | :---: |
| Unranked | $\checkmark$ |
| Update Rank \＆Status |  |
| Current Status |  |
| C New Candidate 02／08／2007 | † |
| Available Actions |  |
| C Phone Screen | ＋ |
| C Not Qualified | 勺 ${ }^{\text {d }}$ |
| $\bigcirc$ Interview One | ＋ |
| C Interview Two | ＋ |
| C Offer Extended | ＋ |
| C Offer Rejected | ＋ |
| C Offer Pending | ＋ |
| C Hired | 图 $\square^{\text {a }}$ |
| C Start | ＋ |
| C Not Selected | 勺 ${ }^{\text {d }}$ |
| C Not Selected－Interviewed | ＋ |
| C Future Interest | ＋ |
| Status History |  |
| Applicant has no status history． |  |
| －Automatic E－mail． <br> 图 Pop－up E－mail． |  |
| Update Rank \＆Status |  |

Section 2：Located in the gray box on the right side of the page．
－Update Ranking．
－Update not selected reason（if applicable）．
－Update Status．
－Send automated status letters（if applicable）．
－Undo an interview status by clicking on the blue arrow to the right．

- Perform advanced status functions.
- For this applicant, change the status date or add a comment
- For all other respondents applying to this job, change status or add a comment.
- For all other job applications submitted by this respondent, change the status or add a comment.

NOTE: If an interview status has the icon $\boxtimes$, an automatic e-mail will be sent to any candidate placed in this status. If a status has the icon 回, a pop-up window is displayed. Users may alter information in the e-mail before sending.

## Action Buttons



- Q-Campaign: Send an email campaign to many candidates.
- Schedule: Creates a meeting request calendar file locally on the user's computer. The file will have some information about the candidate pre-filled in the meeting request.
- EEO (if applicable): Manually enter a person's EEO data (Recruiting Manager access only).
- Access: View all users who have accessed this candidate record.
- Comments:
- Add a comment.
- View comment history.
- View status history.
- Email the candidate's resume to another person.
- Hotlist the candidate for another iQ user by selecting the name of the recruiter from the Hot List box on the right side of the screen, and click the "Add to Hot List Button".
- Add Doc: Upload a document to attach to this candidate record.
- Transfer: Transfer candidate to another job.
- Hotlist: Add this candidate to the Hotlist.
- Submit Candidate: Makes this candidate viewable by the applicable hiring manager
- Email: Allows for either SmartView, attached documents or notifications to be sent
- Back: Go back to the previous page.


## Using Candidate Finder

Candidate Finder assists users in locating candidates by their contact information. This is generally most useful when trying locating a specific candidate by name or address.

- From the Navigation bar, scroll over Responses.
- Select Candidate Finder



## Explanation of Fields

- Teams: Search for candidates who have applied to "My Jobs" or to Team jobs (users will only be able to search on teams to which a user has access).
- Job Postings / Talent Pools: Search for candidates in job postings, talent pools, or both.
- Maximum Returned: Choose the newest 50 or all candidates with a maximum of 500.
- Search Type: Select Exact Match, Contains or Begins With from the drop down.
- First Name: Search candidate(s) by first name.
- Last Name: Search candidate(s) by last name.
- .Address: Search candidate(s) by address.
- Social Security Number: Search candidate(s) by social security number (if collected).
- e-Mail Address: Search candidate(s) by email address.
- Country, City, State: Search candidate(s) by country, city or state.
- Zip Code: Search by candidate(s) by zip code.
- Click Next.
iQ Tip: Search for candidates who live in an area by entering the first three numbers of a zip code and using Search Type: Begins With.

Hotlist is an organizational tool that maintains a user-specific list of candidates to access with a single click. Candidates added to a Hotlist are not removed from the position(s) to which they applied.

- From the Navigation Bar, scroll over Responses.
- Select Hotlist.


Information on the My Hotlist page includes:

- Name: Candidate's name.
- Home Phone: Home phone number provided by the candidate.
- Work Phone: Work phone number provided by the candidate.
- Job Posting Title: Title of the position to which the candidate applied.
- Status: Current status of the candidate.
- Date Sent: Date the candidate was added to the hotlist.
- Sent By: The person who hot-listed the candidate to this user's list.
- Ranking. Current rank of the candidate.
- Score: Scored results of the questionnaire (if applicable).
- Comments. Indicates whether comments are associated with the candidate.
- Source: Source code for the candidate.
- Talent Scout "Go": Search the database for candidates who match concepts within this candidate's resume.
- The Document Icon: View the candidate's resume.
- Check Box: Works in conjunction with Action Buttons. Select one or many.


## Action Buttons:

- Q-Campaign: Send an email campaign to lists of candidates.
- Print: Print resumes and questionnaire results (if applicable) for selected candidates.
- Add Folder: Add candidates to a project folder.
- Remote: Quickly review candidate information and take action.
- Delete: Remove candidate from the hotlist.
- Download: Download this list to the local computer.
- Transfer: Transfer candidate to a Job Posting or Talent Pool.


## Sending candidates to others for review

There are three ways to send a candidate to someone for review: a link to SmartView for managers who want to see selected candidates, attached resumes for managers who want to review only the resume, or via a notification email upon submission for those managers who log in to Hodes iQ.

To send a candidate, use the email action button, which results in this screen:


## SmartView

When you choose the SmartView option when sending a candidate to someone for review, they receive and email with a link that takes them to a web page. This web page allows for the
recipient of the email to see authorized documents on the candidates that were sent. These documents are customized per client and include things like legal applications, resumes, and any other candidate documents.


## Sending attached resumes

If the "attached resumes" option is chosen in the email panel, an email will be sent to the recipient with only the resumes of the selected candidates attached. This would be used when the reviewer only needs access to the resumes or doesn't want to see the other documents.

## Notify option

This option only applies to users of Hodes iQ. Choosing "notify" sends the recipient an email alerting them to a new submission. This email instructs them to log into their Hodes iQ account to see the candidates that have been submitted for their review. It presents the candidates in the corresponding job in the recipient's Hodes iQ account.

## About Talent Scout

Talent Scout will help find talent in the Hodes iQ resume database. It uses powerful data mining techniques to allow users to paste a sample résumé or job description into the search box and matches it to similar résumés already in the database. The more information given to the Talent Scout, the more it can analyze to return a result. Talent Scout "GO" links are integrated throughout Hodes iQ where a job posting or a candidate is found.

## To use Talent Scout:

- From the Navigation Bar, scroll over Responses.
- Select Talent Scout.
- Enter search criteria

Talent Scout Search
Choose Search Criteria. Then click NEXT.


| RESPONSE DATE <br> When did response arrive? $\square$ |  |  |  |
| :---: | :---: | :---: | :---: |
| DUPLICATE DETECTOR Including duplicates will show a response per job applied to. | C Include duplicates C Remove duplicates |  |  |
|  | YOU CAN BEGIN YOUR SEARCH NOW BY CLICKING NEXT. |  |  |
| IF YOU ARE NOT CHECKING DUPLICATES, YOU CAN SELECT ANYTHING BELOW. |  |  |  |
| RECRUITER RANKING <br> Include/exclude responses by recruiter ranking: | RANKING | INCLUDE | exclude |
|  | Most Competitive (A) | 6 | C |
|  | Competitive (B) | 6 | C |
|  | Unranked (U) | 6 | C |
|  | Not Competitive (C) | 6 | $C$ |
|  | Recycle for different position (R) | 6 | C |
|  | Knocked Out (K) | 6 | C |
| INTERVIEW STATUS Include/exclude responses by interview status: | STATUS | InCLUDE | EXCLUDE |
|  | New Candidate | 6 | C |
|  | Phone Screen | 6 | C |
|  | Phone Screen Completed | 6 | C |
|  | Sent To Hiring Manager | 6 | $C$ |
|  | Send Application | 6 | C |
|  | Interview One | 6 | C |
|  | Assessment Completed | 6 | C |
|  | Offer Pending | 6 | C |
|  | Offer Accepted | 6 | $C$ |
|  | Background Check | 6 | C |
|  | E-Verify Check | 6 | $C$ |
|  | Offer Recinded | 6 | C |
|  | Hired | 6 | C |
|  | Send to Onboarding | 6 | C |
|  | Not Selected | 6 | C |
|  | Selected for another Position | 6 | C |
|  | 30 Day New Hire Survey | 6 | C |

Search Ref Code: Adds this text to the record of this search for EEO-enabled clients.

- Team: Select which team's responses to search.
- Paste Sample Text: Paste text desired as the basis of the search. This can be a job description, resume, etc. text based document.
- Add Keywords: Enter keywords, and how they should be used in the search using Match Any, Match All or Exact Match
- Location: Enter the country, state and city to be searched.
- Response Date: Enter the time frame for the responses to search.
- Duplicate Detector:
- Select Include duplicates
- Include or exclude Recruiter Ranking
- Include or exclude Interview Status
- Click Next

Talent Scout Search Response fields include:


- Name: Candidate's name.
- Location: Candidate's home city and state.
- Number of Responses: The number of jobs to which this candidate has applied.
- Date of Response: The date of this respondent's latest response.
- Job Posting Title: The title of the job to which this candidate most recently applied.
- Status: The last status of the candidate on his/her latest response.
- Rank: The last rank of the candidate on his/her latest response.
- Comments: Indicates if there are comments on this candidate's record for his/her latest response.
- Source: Indicates the source of the candidate's latest response.
- Talent Scout Score: A numeric value, between $100 \%$ and $1 \%$ - with $100 \%$ being the highest, that indicates how well the respondent matches the criteria.
- Talent Scout: Click "Go" to run a Talent Scout search based on the candidate's resume.
- Resume Document Icon: View the candidate's resume.


## Action Buttons

- Print: Print resumes and questionnaire results (if applicable) for selected candidates.
- Remote: Quickly review candidate information and take action.
- Back: Return to the previous screen.
- Save: Save this search.
iQ tip: Any keyword you used to narrow down your search in TalentScout will be underlined this will make reviewing resumes easier!


## CRM Functionality (Q-Campaigns)

Hodes iQ provides a candidate relationship management system that allows users to select candidates, compose marketing messages to those candidates, and record correspondence within the candidate's record. Called "Q-Campaign", users can start a marketing email campaign from any page where the Q-Campaign button is present, including Manage Job Respondents, Talent Scout, Hotlist, and more.

To select candidates for a campaign, click on the checkboxes next to desired users and then click the Q-Campaign button.


A pop up will appear with options for the email. The content of this email is HTML-enabled.


- Send to: Determines the set of candidates who will receive an email. Selected candidates will send email to only the candidates checked. All candidates will send email up to the first 100 users in the list being used.
- Title: the internally used title of the email.
- Description: An internal comment for the email.
- From: Determines what the FROM looks like on the email. In order to not receive a reply, use the selection noreplies@emailhr.com.
- Subject: The subject that will appear on the email.
- Email body copy
- Supports HTML. Users may cut and paste from a HTML-based word processors, or, by clicking on the <> icon, HTML may directly be inserted into the email body.
- Users may apply mail merge fields into the email using the "Insert a Mail Merge variable" drop down. Position the cursor in the body copy where the mail merge variable should occur, select the desired variable, and click the Insert button.

Mail Merge fields available:


|  | This is an advanced field used <br> E-mail address <br> in composing URLs inside of an <br> email for dynamic email <br> content. It will URL encode <br> email address without spaces <br> (URL-encoded) | \%3jsmith\%40yahooo.com\%3e form variables. |
| :--- | :--- | :--- |


| Recruiter variables |  |  |
| :---: | :---: | :---: |
| Full name | The recruiter's First Name and Last Name | Susan Faboo |
| E-mail address | The recruiter's email address | sfaboo@companyx.com |
| Name \& e-mail address | The recruiter's First Name, Last Name and Email address | Susan Faboo sfaboo@companyx.com |
| Phone number | Recruiter's phone number defined in User Preference | (212)999-9000 |
| Fax number | Recruiter's fax number defined in User Preferences | (212)999-9000 |
| Response e-mail address | Recruiter's email defined in Response Information | noreplies@emailhr.com |
| Company variables |  |  |
| (Company) Name | The company's name | Company X |
| Career site URL (web address) | The company's URL for the Hodes iQ-hosted career site. This is an advanced feature recommended for use during a custom-developed HTML message by Hodes iQ staff. | companyx.hodesiq.com |
| Miscellaneous variables |  |  |
| Date in "long date" format | Today's date in long format | Monday, May 19, 2008 |
| Date in "short date" format | Today's date in long format | 5/19/2008 |

Before submitting the email, users may review a sample email with merge fields highlighted.

| Edit E-mail | $\checkmark$ Highlight merged data Send E-mail |
| :---: | :---: |
| Come to our Job Fair |  |
|  |  |
| From: | noreplies@emailhr.com |
| To: | "Elyse Acanda" [eacanda@hodesiq.com](mailto:eacanda@hodesiq.com) (Candidate) |
| Subject: | Come visit our job fair on wednesday |
| Body: | Dear Elyse Acanda, <br> We're holding a job fair at the Northpoint Hotel on Wednesday, and we'd like to invite you to join us. <br> Sincerely, <br> Susan Russell <br> Achieve Success Software (iQ demo) |

## Latest Respondents

Latest Respondents allows a user to view candidates who have applied within a specified date and are currently in one or more specified status(es).

- From the Navigation Bar, select the Responses menu item.
- Click on Latest Respondents.

- Select the Begin Date and End Date desired.
- Select the Status(es) desired
- Select the team from the Show Me drop down.
- Click the filter button.


## Action Buttons:

- Q-Campaign: Send an email campaign to lists of candidates.
- Print: Print resumes and questionnaire results (if applicable) for selected candidates.
- Batch: Perform actions in batch.
- Change Rank, Reason and Status
- Add a comment
- Add Folder: Add candidates to a project folder.
- Remote: Quickly review candidate information and take action.
- Archive: Remove candidates from view on this list.
- Transfer: Transfer candidate to another job.
- Hotlist: Add this candidate to the Hotlist.
- Email: Send the candidate's resume and questionnaire results (if applicable) to another person.


## About Sourcing Plans

Sourcing Plans contain pre-selected E-Media selections used during the Create Job Posting process. For example a user may want to build a shortcut to select only the corporate Career Site and all free sites. Once a sourcing plan is created, a user can select it in the Create a Job Posting process.

## Creating A Sourcing Plan

- From the Navigation Bar, scroll over the Sourcing menu option.
- Select Create Sourcing Plan.
- Select one of the two options:
- Create a new Sourcing Plan
- Create a new Sourcing Plan using an existing plan as a template.
- Click Next.


The fields used to create a sourcing plan look similar to those in the second step of the Create Job Posting process.

- Industry: Select the primary industry to which the company belongs. Then from the sub-list, highlight an industry that is as close as possible to the business. This controls the suggested E -media shown on the next page and how the job is characterized on E media.
- Function: Select the primary function of the position. Then from the sub-list, highlight a more specific function. This controls the suggested E-media shown on the next page and how the job is characterized on E-media.
- Job Posting Type: Select appropriate option.
- Pay Type: Select appropriate option.
- EEO Category (if EEO enabled): Select appropriate option.
- Education: Minimum required for the job, used for E-media only.
- Years Experience: Minimum required for the job, used for E-media only.
- Job Level: Select appropriate option, used for E-media only.



## Explanation of Fields

- Sourcing Plan Name: Name the sourcing plan
- Team: The team that will have access to this sourcing plan.
- Keywords: Enter keywords related to the posting. These words are used to match the posting with recommended job board packages.
- Type of Job: Select appropriate option.
- Industry: Select the primary industry to which the company belongs. Then from the sub-list, highlight an industry that is as close as possible to the business. This controls the suggested E -media shown on the next page and how the job is characterized on E media.
- Function: Select the primary function of the position. Then from the sub-list, highlight a more specific function. This controls the suggested E-media shown on the next page and how the job is characterized on E-media.
- Location: Select the Country, Region/State/Province, City, and Postal Code (optional) for this sourcing plan.

The E-media Library
The E-media Library allows users to look up E-media descriptions available within Hodes iQ.


## To look up an E-Media

- From the navigation menu, scroll over Sourcing.
- Select E-media Library.
- Select a method to locate E-media.
- Click Next.

- Enter the name of the job board and select Begins With, Ends With, or Exact Match
- Click Next to review results.

To submit an E-Media request

- From the navigation menu, scroll over Sourcing.
- Select E-media Request.
- Enter required fields.
- Click Email.


NOTE: eMedia requests are sent directly to the Hodes iQ Media Team. Due to the high volume of requests and coordination with media partners, there is a significant waiting list for new E-media. For information on how to expedite a request, contact support@hodesiq.com.

## About Job Templates

Job Templates can be used to create a position library of job descriptions that are re-used during the Create Job Posting process. It also stores default information like the standard opening and closing descriptions of the organization.

## To Create a Job Template:

- From the navigation bar, scroll over Tools.
- Select Create Job Template.


Hodes iQ §
enterprise

## Explanation of Fields

- Job Template Name: The internal name given to the template, which will appear in the Create Job Posting process.
- Job Posting Title: Enter the job title (if applicable).
- Industry: Select the primary industry to which the company belongs. Then from the sub-list, highlight an industry that is as close as possible to the business.
- Function: Select the primary function of the position. Then from the sub-list, highlight a more specific function.
- Job Posting Type: Select Direct, Contract or Temporary
- Pay Type: Select appropriate option.
- EEO Category (if EEO enabled): Select the EEO category associated with this job.
- Education: Minimum required for the job.
- Years Experience: Minimum required for the job.
- Job Level: Select appropriate option.
- Team: Assign a team which will have access to this template.
- Part Time/Full Time: Select appropriate option.
- Number of Openings: Select the number of openings available.
- Keywords: Enter keywords related to the posting. These words are used to match the posting with recommended job board packages.
- Part Time/Full Time: Select appropriate option.
- Number of Openings: Select number of openings associated with the posting.
- Country: Select appropriate option.
- Region: Select appropriate option (field appears when selected Country is not United States).
- State: Select appropriate option.
- City: Select appropriate option (field appears when State is selected).
- Only 1 location is available per job.
- Postal Code: Enter the Postal Code for the job location (optional).
- Street Address: Enter the street address for the job location (optional).
- Opening, Job Description, Additional Requirements, Closing: Enter the job description desired. The content in each of these sections displays on the career site and on job boards. (See Create Job Posting section for more information on HTML in job postings.)
- Base Compensation: Display base compensation ranges (if desired).
- Total Compensation: Display base compensation ranges (if desired).
- Internal Description: Enter job information for use on Internal Mobility sites (if configured to use this field).
- Memos: Enter information for display on invoices associated with postings using this template.


## Manage Job Templates

- From the navigation menu, scroll over Tools.
- Select Manage Job Templates.
- Select a team from the Show Me drop down.
- Click the filter icon to the right.
- Click on the job template's title to open the template.
- Enter the changes into the appropriate fields.
- Click Save.

NOTE: Edits to templates will be reflected in new postings only. To edit information in existing postings, see WORKING WITH JOBS - To View Details of a Job.

## Action Buttons

- Add Folder: Add selected templates to a project folder.
- Copy: Copy a job template.
- Delete: Delete a job template. Deleting a template will not impact existing jobs.


## Hodes iQ Tools

## Manage User Preferences

Manage User Preferences allows a user to update personal account information and customize certain preferences.

- From the Navigation Bar, scroll over Tools.
- Click on Manage User Preferences.

Manage User Information: Step 1
Update your user profile


## Explanation of Fields

- First Name: Your first name
- Last Name: Your last name
- Phone: Your work phone number
- Fax: Your fax number
- e-Mail Address: Your e-Mail address
- Reply-To e-Mail Address: The reply e-Mail address that will appear in e-Mail correspondence sent from Hodes iQ
- My Default Team: The team displayed for all pages with a team parameter.
- My Default Team for Talent Scout: the default team talent scout uses to search candidates
- Expiration Alert Days: Days you will be notified prior to your job expiring from a job board.
- Alert By e-Mail: Check this box to receive an expiration e-mail notification.
- Change Password: Change your login password (Note: your new password must be at least 8 characters).
- Old Password: Enter your current password
- New Password: Enter new password
- Confirm Password: Re-enter your new password

Manage Response Information
Manage Response Information allows a user to enter/update the contact information related to job postings.

- From the Navigation Bar, scroll over Tools.
- Click on Manage Response Information.

Manage Response Information fields include:

- Company Name: Company Name.
- Contact Name: Contact Name to be sent to an E-media.
- Response e-Mail: The email address to which responses will be sent. (This setting pertains to job postings set as response type "via e-Mail").
- Web Site Address: Your corporate URL. (web address).
- Response Address: The physical address of your company. (This setting pertains to job postings set as response type "via mail").
- Country: The country where your company is located.
- City: The city where your company is located.
- State: The state where your company is located.
- Zip Code: The zip code of your company's address.
- Response Phone: The phone number to which responses will be directed. (This setting pertains to job postings set as response type "via phone").
- Response Fax: The fax number to which responses will be directed (This setting pertains to job postings set as response type "via fax").


## Manage Response Information: Step 1

Update your response info


## More Tools

Depending on the user's account configuration, different options may appear within the More Tools area. All users have access to the Manage Expense Categories item in More Tools. To view this page:

- Select the Tools menu item
- Then, select More Tools


## Other Tools

Please select a tool below.

Description
Manage expense categories

Hodes iQ provides both standard reports and a full ad hoc reporting system to create metrics for the organization. Standard reports can be found under the Reports menu selection item, with the selection of "Ad Hoc Reporting" in that menu bringing a user to the ad hoc reporting log in.

The Hodes iQ Ad Hoc Reporting tool is provided by Hodes iQ as a service to allow clients to define, design, and generate their own reports based on data within the Hodes iQ system. It is a web-based tool that supports some features for business-level users (non-technical) and report writers (technical).

## Please see the Ad Hoc Reporting documentation within the help desk for specific information on reporting capabilities.

In addition, there are dashboards and summary pages within Hodes iQ's main application to take note of in everyday user activity. For example, when meeting with a hiring manager, a user may want to provide a quick print out of specific jobs and the number of candidates in each job in that pipeline. The Respondent Summary on the Job Detail page is a convenient way to obtain that information.

Also, the SmartPost ROI report, available on the Job Detail page is a full dashboard view of the effectiveness of a specific media campaign and is useful for daily tactical use.

## Hodes ©

Standard Reporting Functionality (does not apply to ad hoc reporting, see ad hoc guide for instructions)

- To run a report, go to the Reports menu item
- Select the desired report.
- Use any desired filter criteria like dates, teams, or other given criteria, and hit the filter button.
- To download the report in a delimited flat file, type the desired filename in the filename field, and click download.
- Right mouse click on the new link given on the page to download the data to your computer.

