User Manual

3 January 2014

Contents

1 Introduction

G4, the tool you are about to start using, is an Information System designed to improve and automate your company's recruitment processes, project management and other useful processes. It will allow your organization to share candidate information, create projects, assign workers to them and a lot more. G4 will also reduce the amount of paper you will require for your work.

G4 allows you to follow the recruitment process from the candidate's side and from the client's side. This means that changes made in a client's process that are related to a candidate will also show up in the candidate's profile.

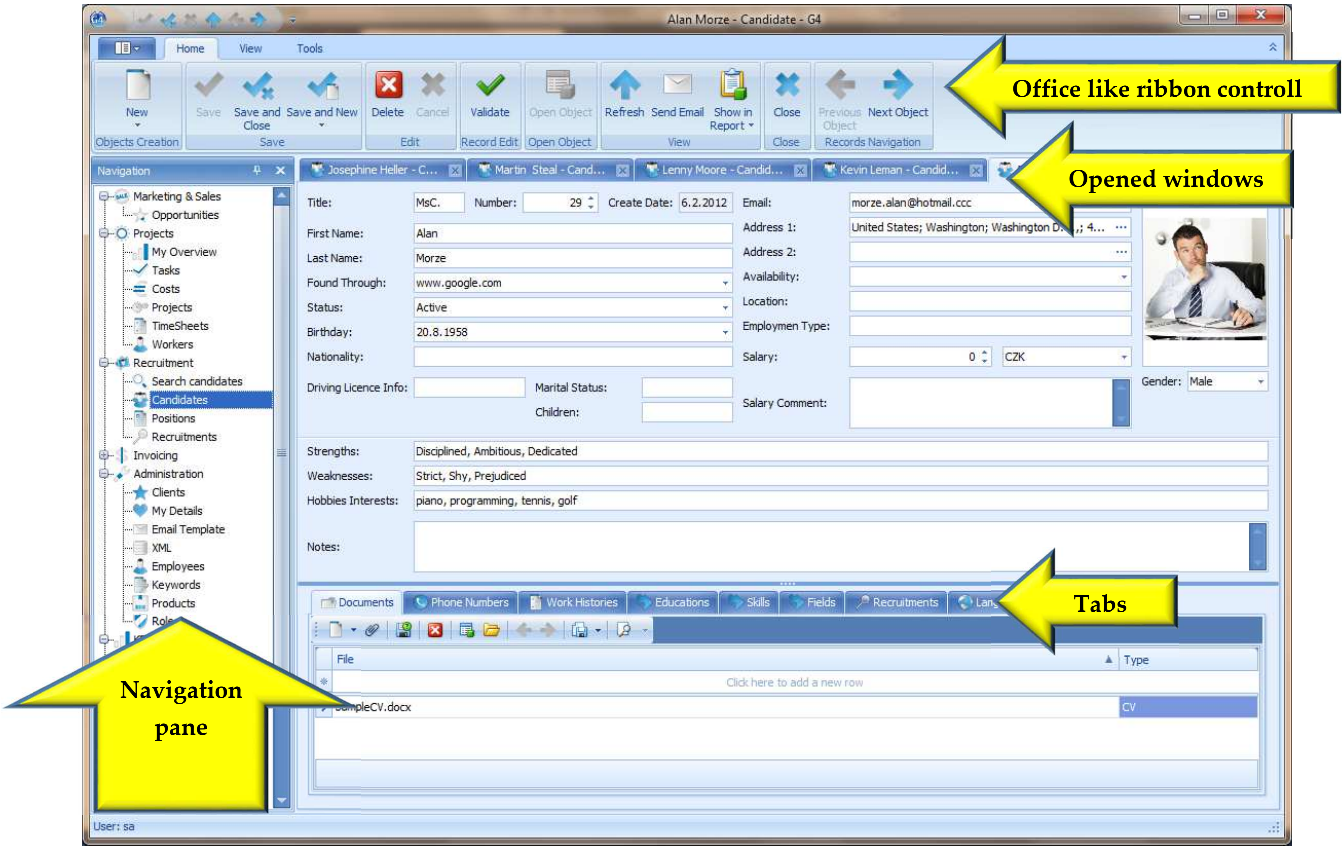
Project management allows creating various projects, adding tasks and assigning workers to them. Workers then can fill in work hours and additional costs. Based on these data it is possible to create billing plans and invoices.

History

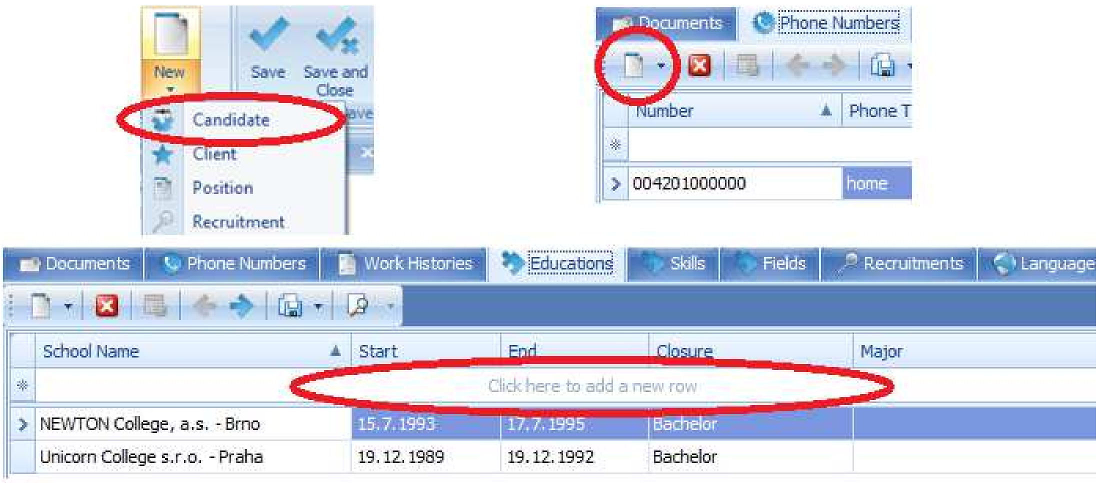
G4 has been in continuous development since the beginning of year 2011. The main idea was to create a complex scalable solution to fulfill various demands of recruitment companies, HR departments and other companies using project management tools. You are currently working with the latest version of G4. It's based on .NET technology (the application was developed mainly in C#) and a full grown SQL database which is currently the newest technology available.

2 Common Functions

2.1 Layout and Terminology

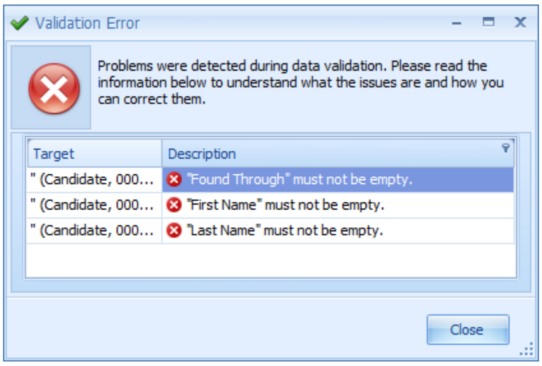


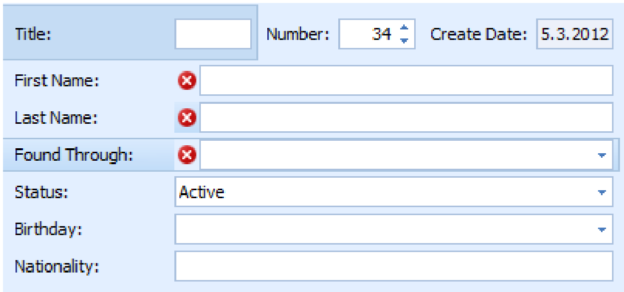
2.2 Creating New Items



There are several ways to create new items. The “New” button is always visible on the upper left corner. Simply hitting the button creates new item based on active window. For example when you are working with candidates and hitting the “New” button an empty window will appear where you can fill in data. When choosing the bottom part of the “New” button a drop down menu will appear with creatable items like Position, Client, Worker, etc. When adding collections like phone numbers a small "New" icon is visible in taskbar at the top. By clicking this button a new window pops up with data entry. It is also possible to add new collection member by clicking the new empty row in the list. Note that this row can be hidden or placed at the bottom of the list.

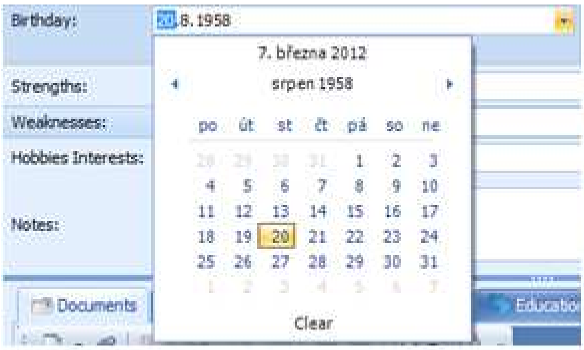
2.3 Data Validation





Any field marked is a required field. It is not possible to save data without filling those fields.

2.4 Editors



Fields can be changed by appropriate editor. Whenever you see a field with an arrow pointing downwards it's a drop down menu that allows you to make a selection from a list. In this case you can select a date or a language.

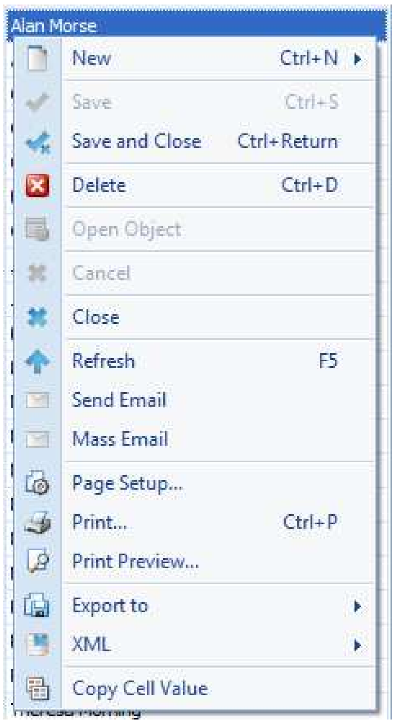
2.5 Saving

There are three options when saving data.

- *Save* – Use this option when editing data and want to keep window opened.

- *Save and Close* – Use this option when you finished editing data and wants to close active window
- *Save and New* – Ideal when adding multiple records of the same type. Just with one click the data is saved and new window is opened for data entry.

2.6 Context menu sample (Candidate)



Above you can see what options you have when selecting an item (in this case a person) and clicking the right mouse button. Options will vary depending on the item you select.

2.7 View Types

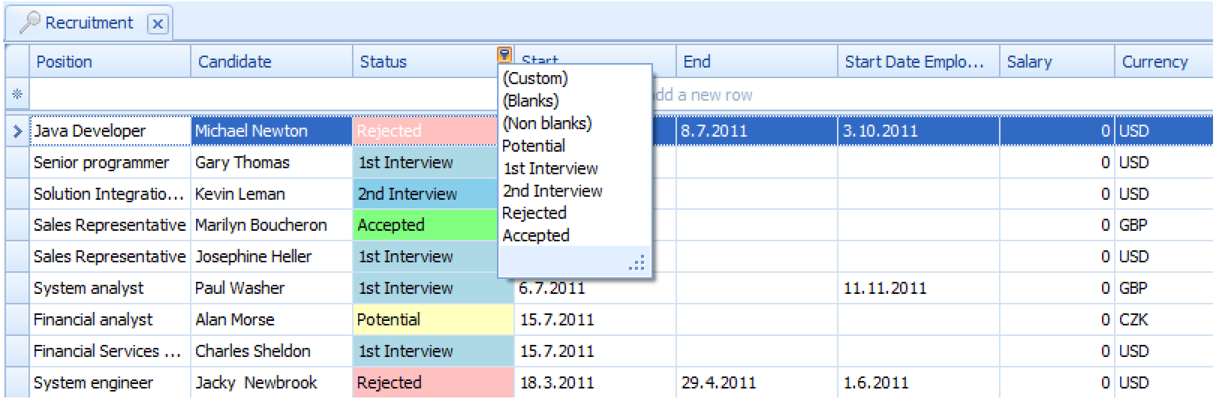
There are three types of view of the data: List, Detail and Combined View

2.7.1 List View

Position	Candidate	Status	Start	End	Start Date ...	Salary	Currency
Java Developer	Michael Newton	Rejected	5.5.2011	8.7.2011	3.10.2011	1 800	USD
Senior programmer	Gary Thomas	1st Interview	7.7.2011			1 900	USD
Solution Integration ...	Kevin Leman	2nd Interview	15.7.2011			2 000	USD
Sales Representative	Marilyn Boucheron	Accepted	11.5.2011			1 750	GBP
Sales Representative	Josephine Heller	1st Interview	15.7.2011			1 680	USD
System analyst	Paul Washer	1st Interview	6.7.2011		11.11.2011	1 580	GBP
Financial analyst	Alan Morze	1st Interview	15.7.2011			2 000	EUR
Financial Services Re...	Charles Sheldon	1st Interview	15.7.2011			2 500	USD
HR manager	New Candidate	Potential	2.11.2011		4.11.2011	21 000	CZK
System engineer	Jacky Newbrook	Rejected	18.3.2011	29.4.2011	1.6.2011	2 050	USD

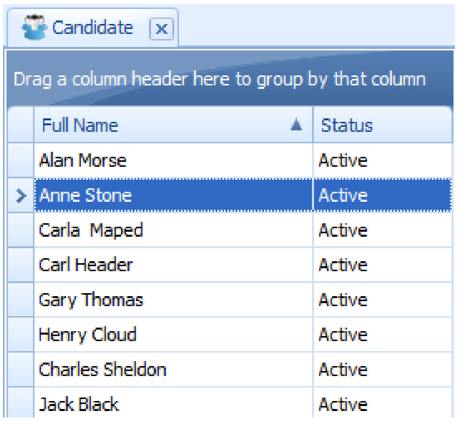
Provides simple, Excel like look of data. There are several useful operations which are described below.

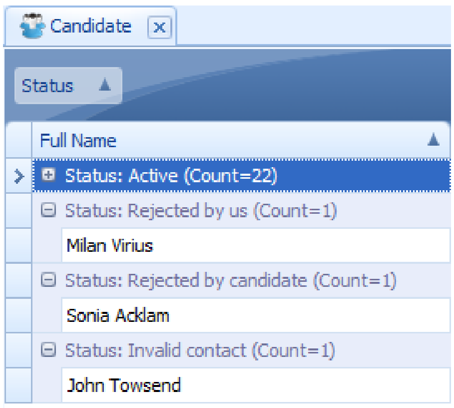
2.7.1.1 Filtering



By selecting an item (in this case a status) in the drop down menu you can filter the list to display data that is only related to that item. In this example we are looking at all the candidates that are currently in a recruitment process. By choosing a status from the drop down we narrow down the candidates to those related to the recruitment process with the given status.

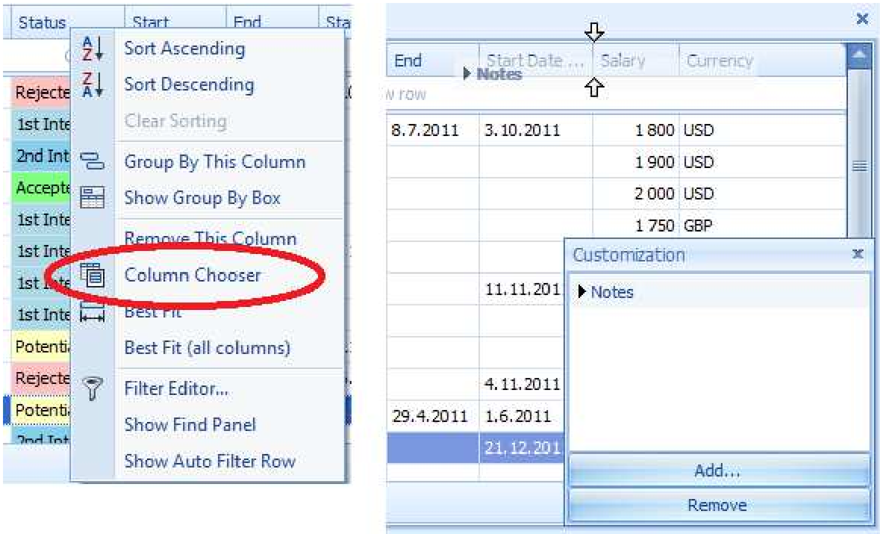
2.7.1.2 Grouping





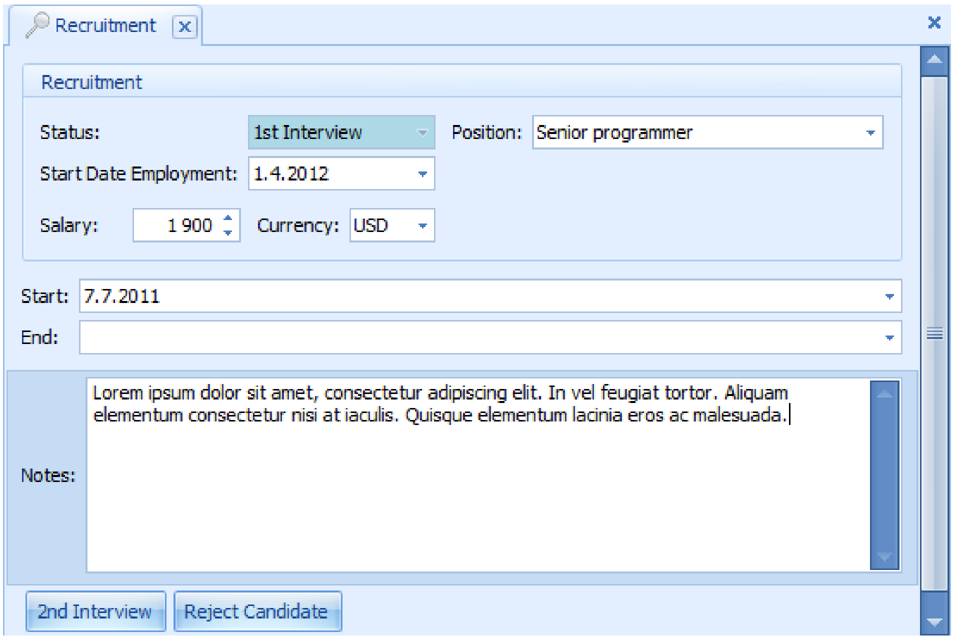
Another way to filter data is to click on a column header ("Title", "Start date", "Status") in the drop down menu (click once and hold) and to drag it into the blue bar above. Items (candidates) will then be grouped according to the header (notice the "Status" header in the blue bar).

2.7.1.3 Column Chooser

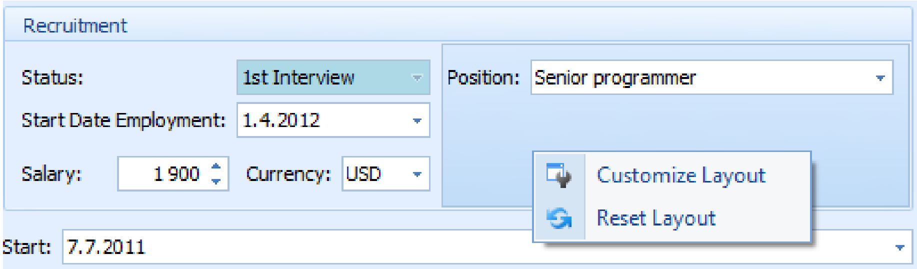


It is possible to customize column list. To do this right click on the column header and click on Column Chooser. A small window opens with available columns. Drag and drop columns to customization window to hide them or from customization window to grid to display data.
Tip: It is possible to change column order by drag and drop operation.

2.7.2 Detail View

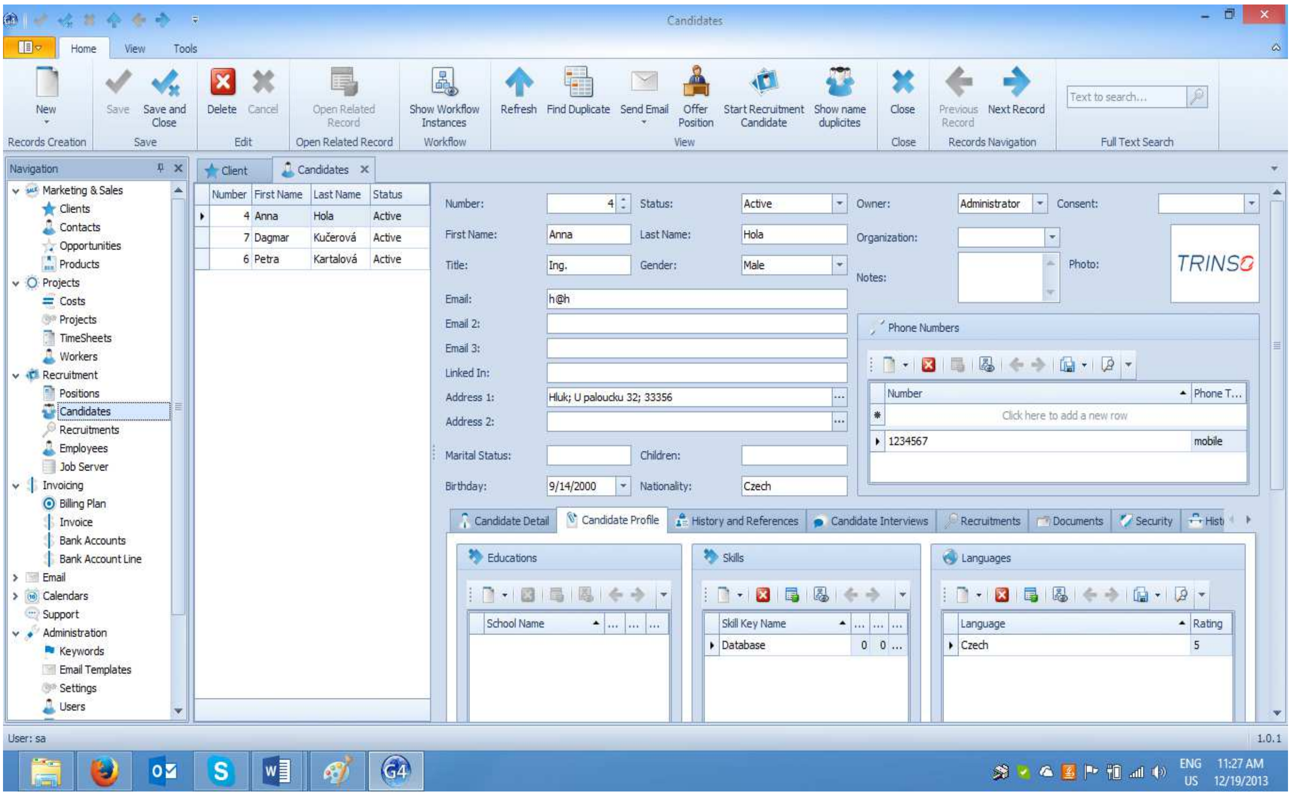


By double clicking on a list view item you open given records detail view. Detail view enables full window editing of the record.



The layout of the view is fully customizable by user. Just left click on an empty area of the view and select Customize Layout. By drag and drop operation it is possible to create custom detail view. You can find more information here:
http://documentation.devexpress.com/#WindowsForms/CustomDocument2307

2.7.3 List View with Detail View

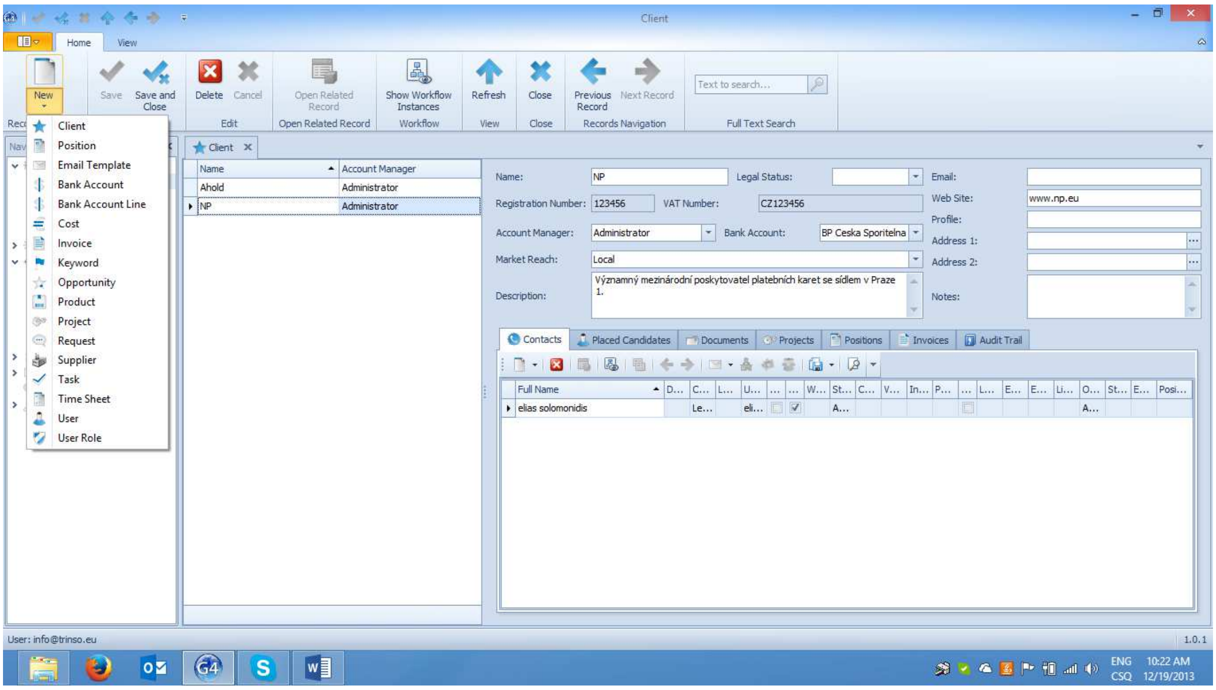


List view visible at left with detail view on the right. By selecting rows in the list the corresponding detail view is displayed on the right.

3 Module Marketing and Sales

3.1 Client

3.1.1 How to Create a New Company (new client)



To get started working with a client you have to create one. You can do this by clicking on the arrow below the "New" icon and selecting "Client" from the drop down menu. After clicking an empty page will appear where you can fill in information. Enter the name and save data.

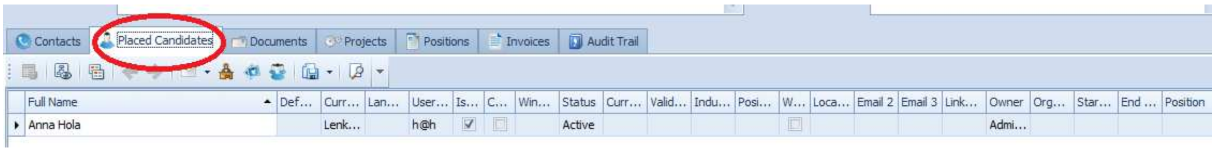
3.1.2 Basics

As you can see you've created a client now. You will need to fill in the missing relevant information including the company's legal status, the client's reach, addresses, etc.

3.1.3 Contacts

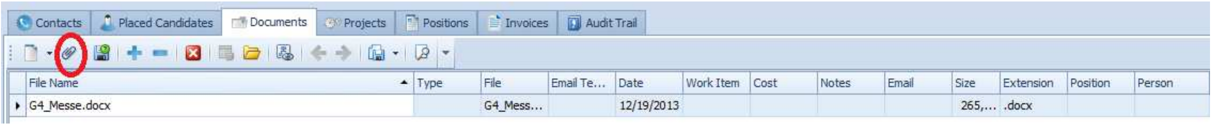
Add contact persons by clicking on "New" button in taskbar. Fill in name, email and phone numbers. Email is mandatory, you will get the communication with contact in History Tabs of contact.

3.1.4 Placed candidates



If you have already in recruitment process an accepted candidate, you will see it in placed candidate Tabs.

3.1.5 Documents

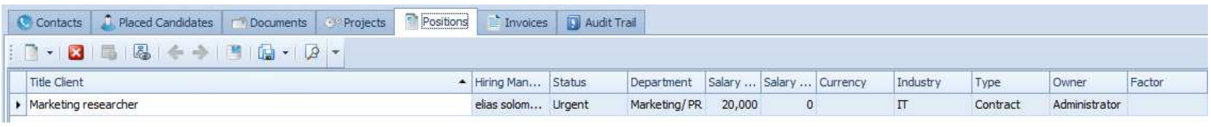


It is possible to add numerous documents to Client's profile. For example scanned contracts, etc. Attach file by clicking on the clip sign or by drag and drop operation. Select document type from list and save Client.

3.1.6 Projects

Here you can define Projects. More about project in: 4 Module Projects

3.1.7 Positions

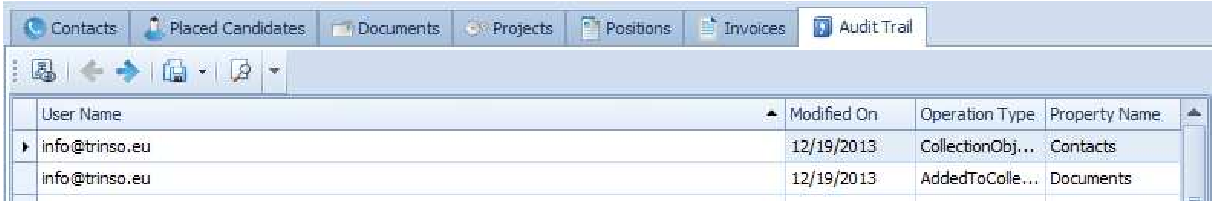


List of positions filtered by given Client. You can add new position by clicking the "New" icon in the upper left corner of position list.

3.1.8 Invoices

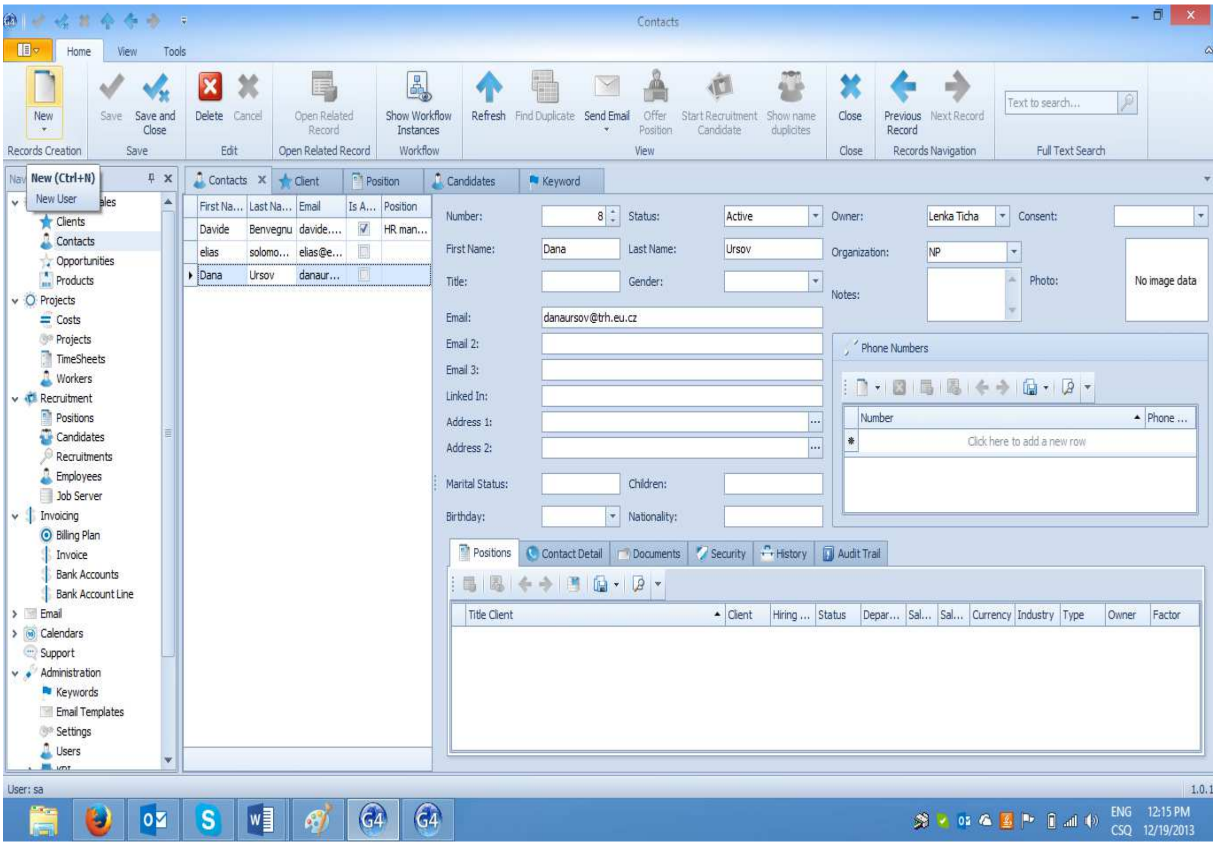
Invoice list issued to Client. More about Invoices in: Module Invoice

3.1.9 Audit Trail



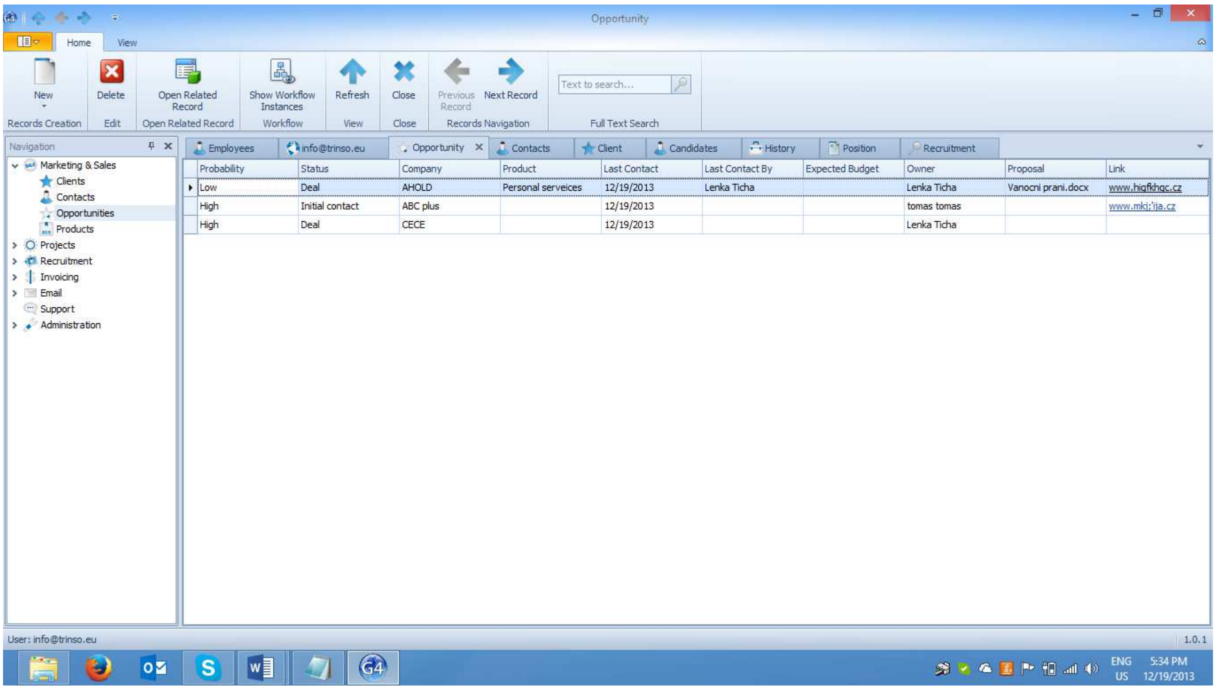
Here is controlling tool to monitor user changes.

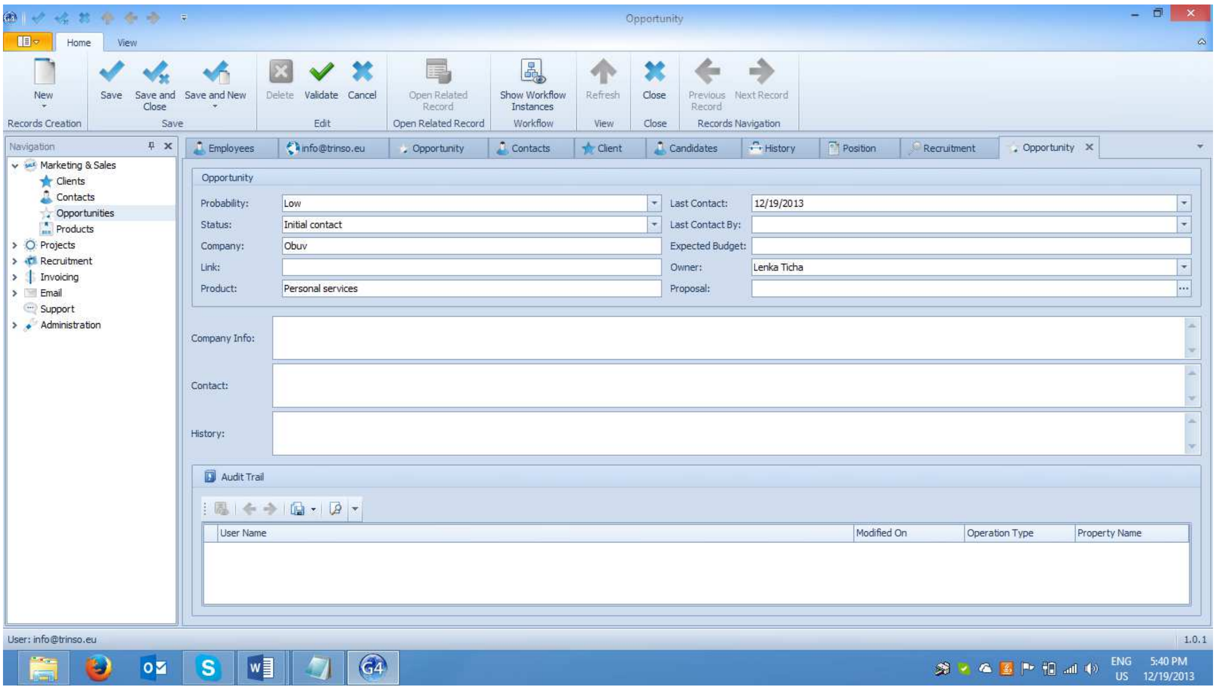
3.2 Contacts



Fill in name, email and phone numbers and other field you wish to. Email is mandatory, you will get the communication with contact in History Tabs. In History you will find all emails send and received from this contact.

3.3 Opportunity

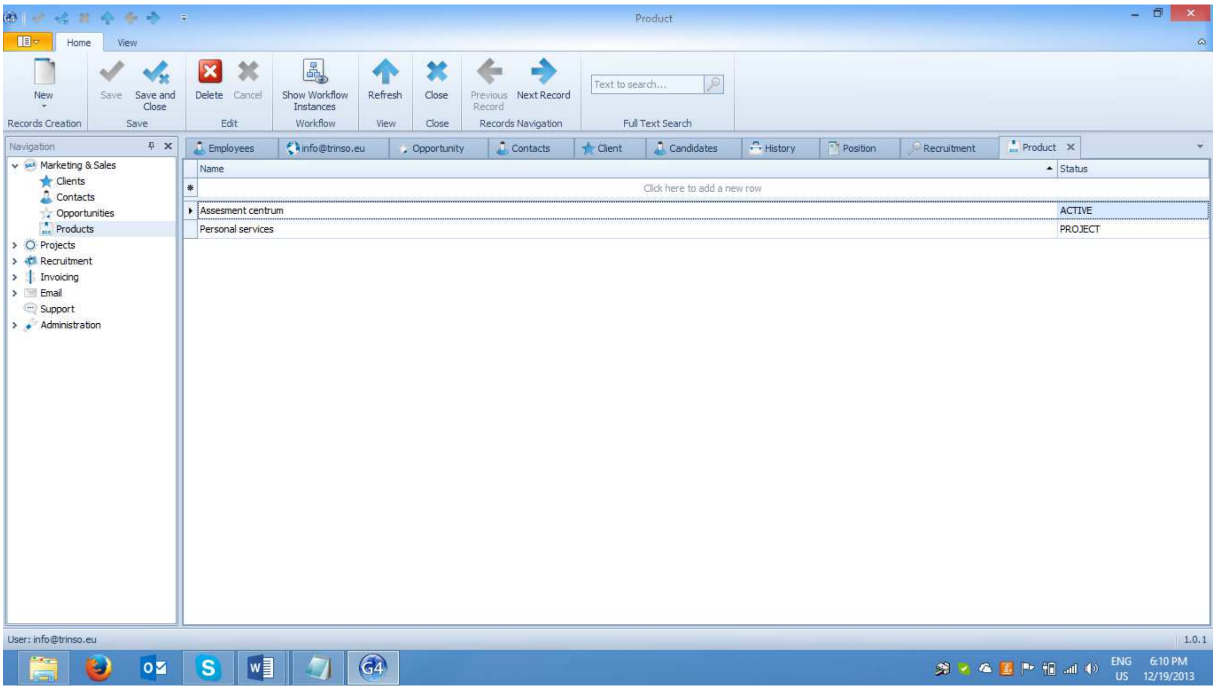




Gives a sales representative a tool to track sale opportunities. To create new entry click on the “New” button.

Status is set automatically to initial contact. Fill in additional fields like company you are contacting, probability for making deal or expected budget. If you have DEAL with your opportunity than the opportunity will occur in your clients.

3.4 Products

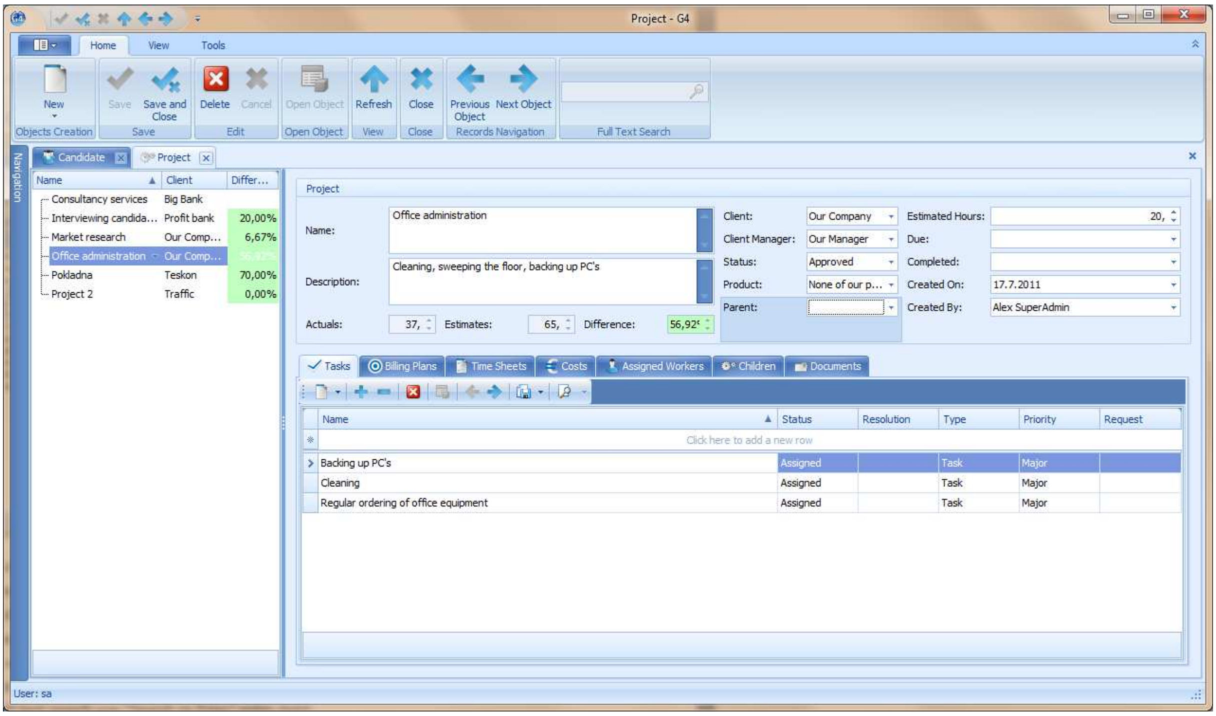


List of your products.

4 Module Projects

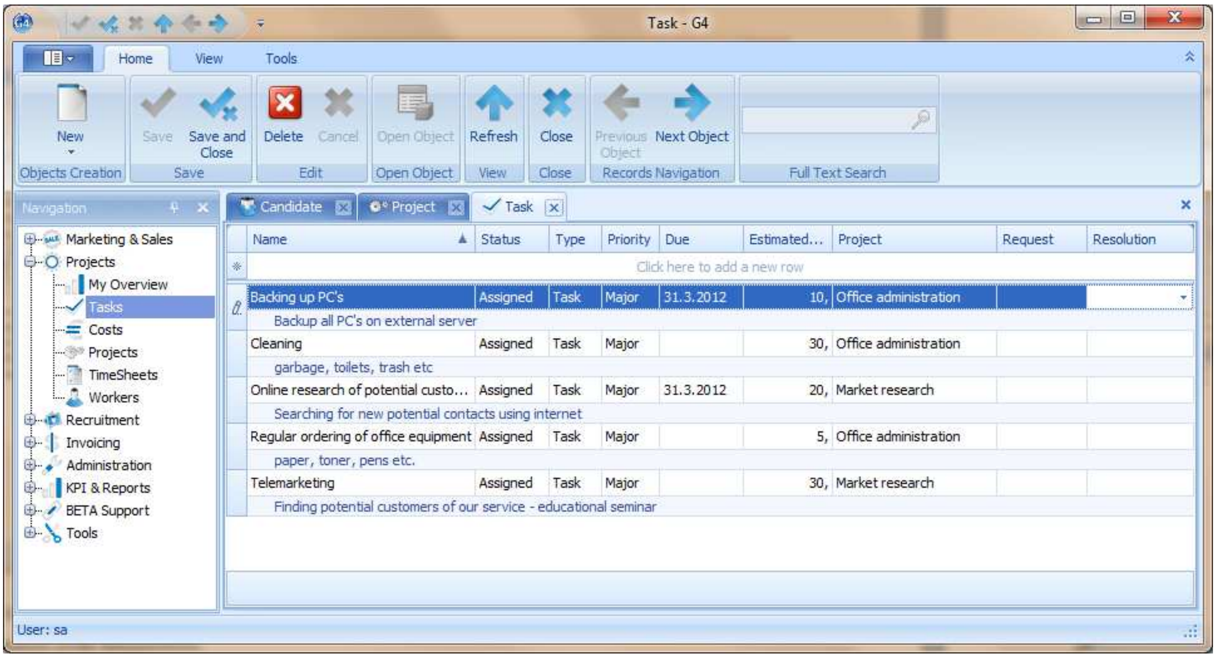
This module is a simple project management tool. You can track various project from clients or internal ones, assign task, workers and much more.

4.1 Projects



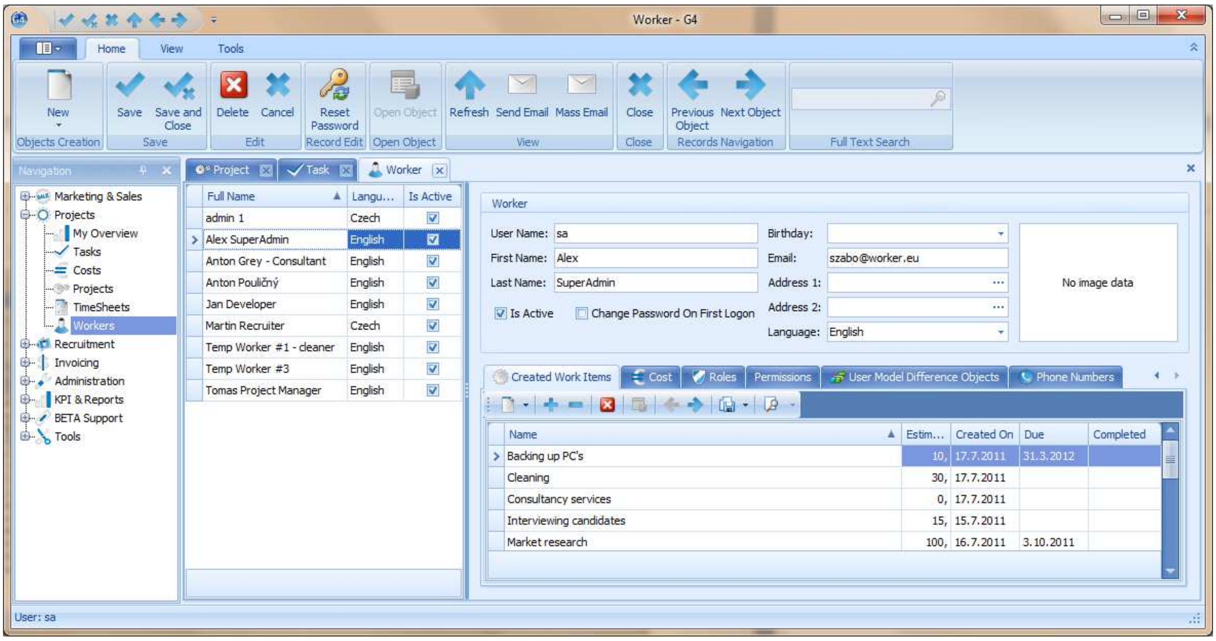
Contains project definitions. In this screen it is possible to define and change project properties like status, estimated hours and project description. We can also see project related task list, time sheets or uploaded documents. To create new project simply click on a "New" icon in the upper left corner.
Tip: create tree hierarchy from related projects. To do this simple select parent project in "Parent" field

4.2 Tasks

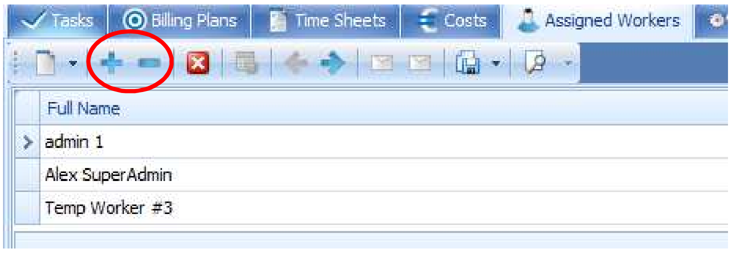


There is no project without assigned tasks. To create one select "Tasks" in navigation and click on the "New" button in the upper left corner or create one under Project – Tasks tab.

4.3 Workers

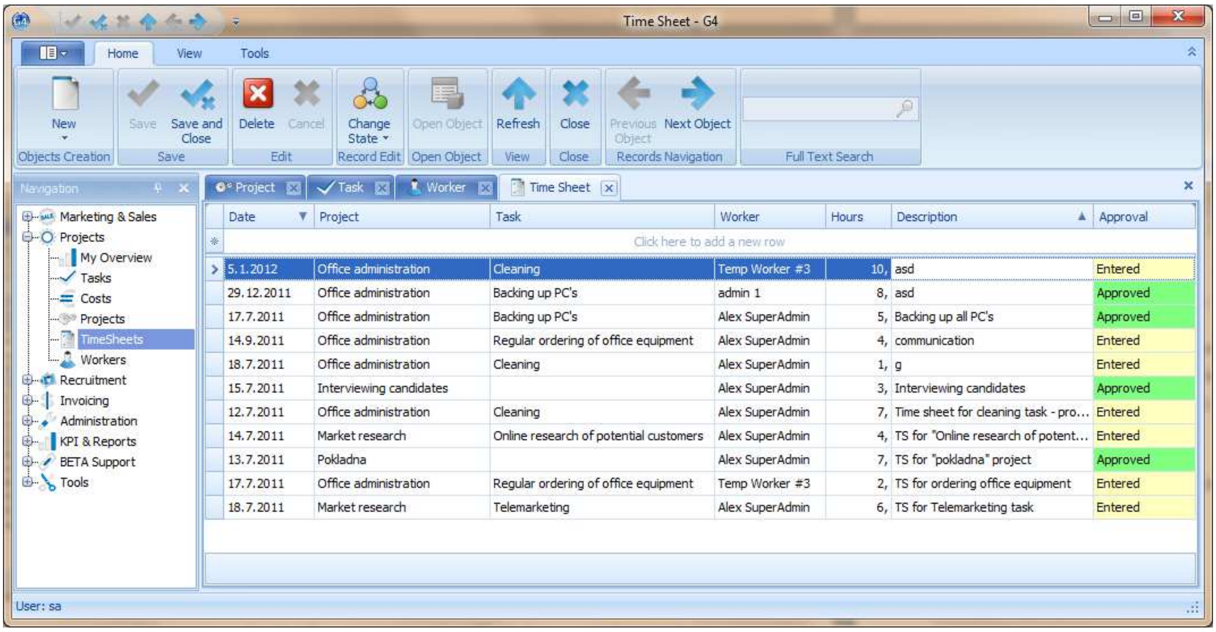


Add workers to project by creating them under “Workers”. Just click on the “New” button and fill in relevant information.



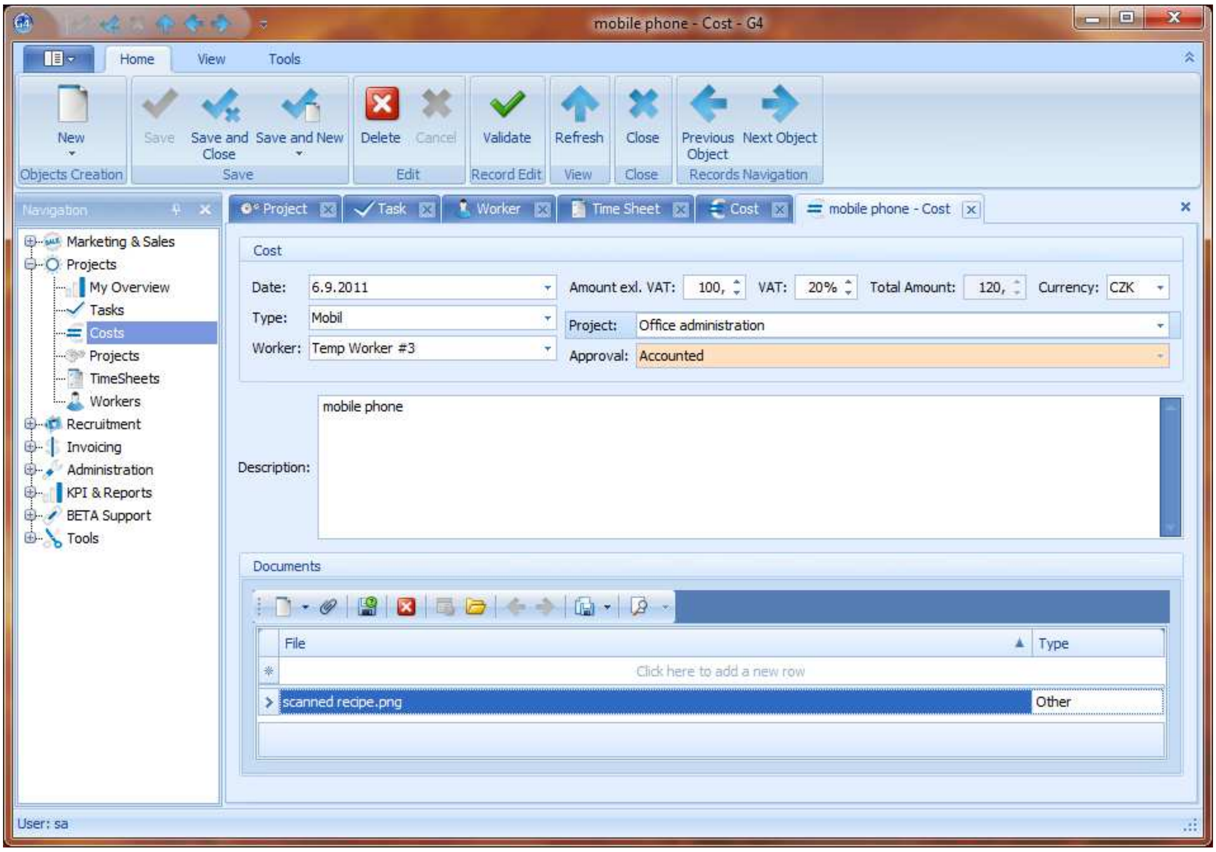
To assign a worker to a project go to Projects, select project and switch to “Assigned Workers” tab. Now hit the plus sign and select worker. To remove worker from this list simply select the worker and use the minus sign.

4.4 Time Sheets



To track time spent on projects and tasks use Time Sheets. To create new time sheet just select the “New” icon when on Time Sheets view. Select worker, project and task (optional), fill in hours and a short description. The approval status is set to “Entered”. You can use this status to approve time sheet entries entered by workers.
Note that only approved projects can be selected in time sheets.

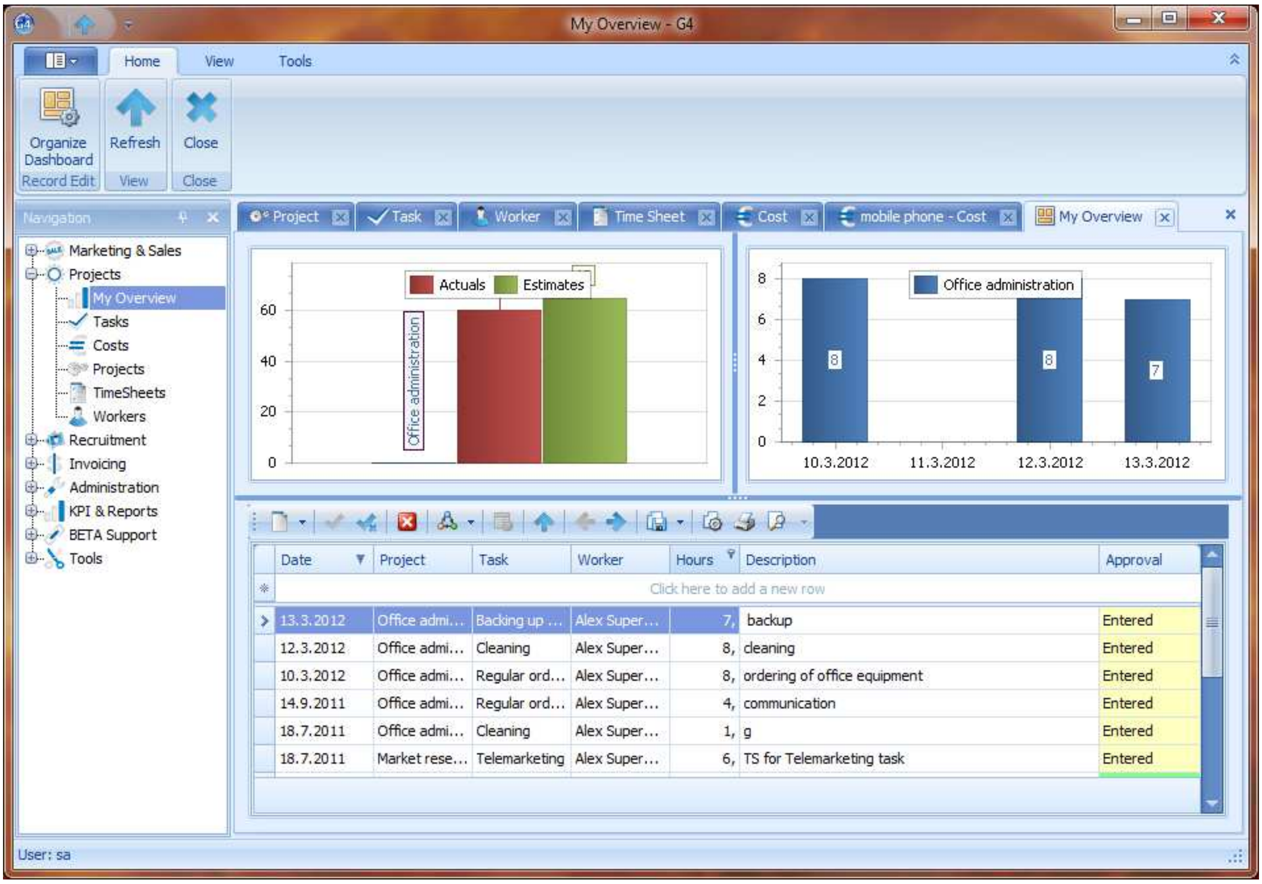
4.5 Costs



Some projects may include additional expenses like phone calls, travel, etc. You can track those issues in Costs. Create new cost item, fill in worker, project, amount exl. VAT, VAT, currency and a short description. Optionally it is possible to attach scanned recipe or other document.

Approval state is set to "Entered" A manager can use this state to approve or reject expenses.

4.6 Overview

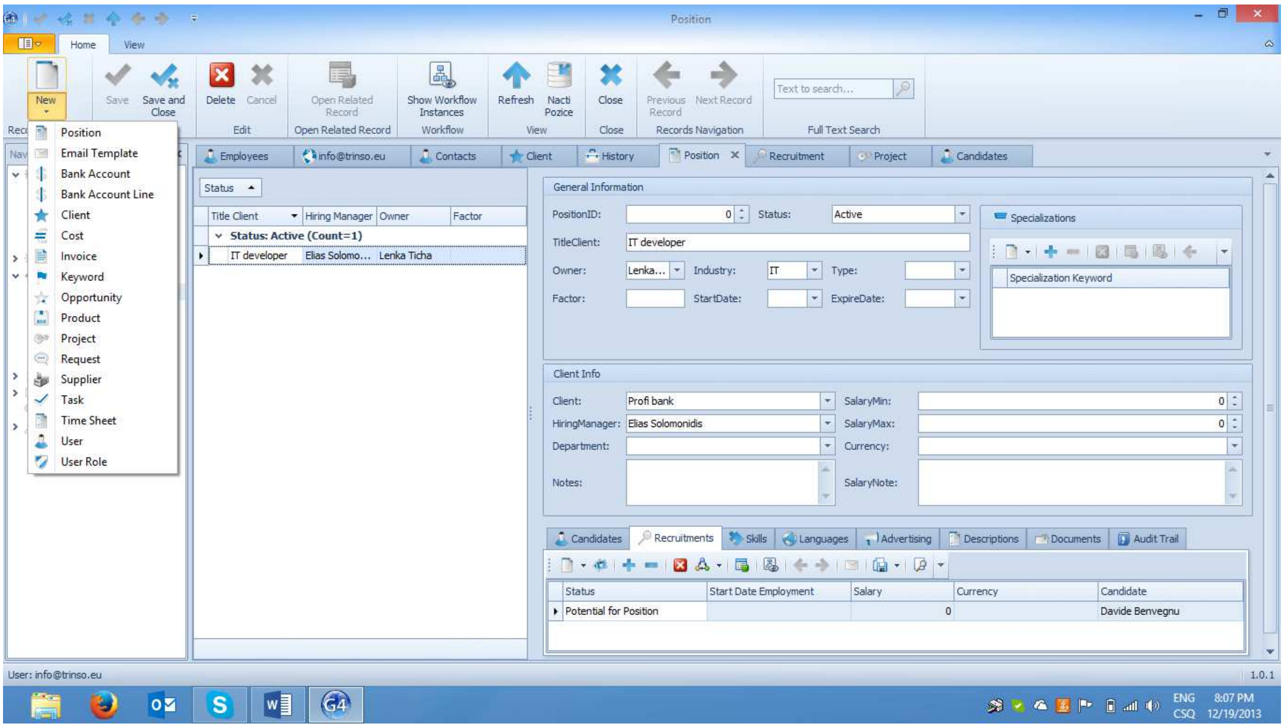


Dashboard overview is used to visualize data for active user. The logged on worker gets overview about own hours spent on projects, hours for the actual month or time sheet entries at the bottom.

Note that this is just a sample dashboard view. It is possible to define various graphs, list to view.

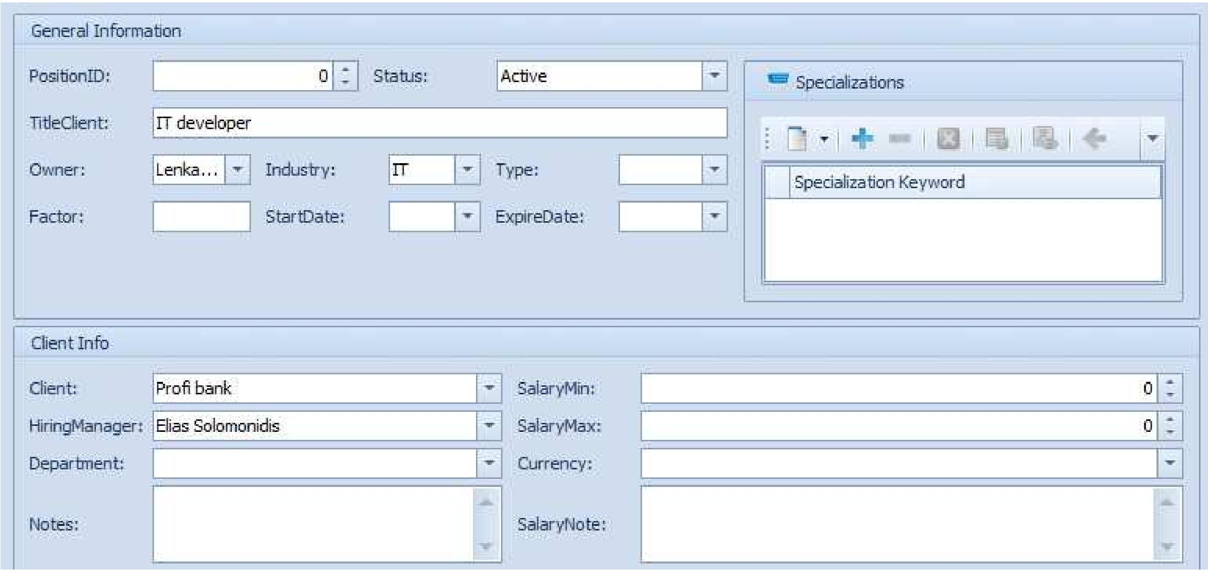
5 Module Recruitment

5.1 How to Create a New Position



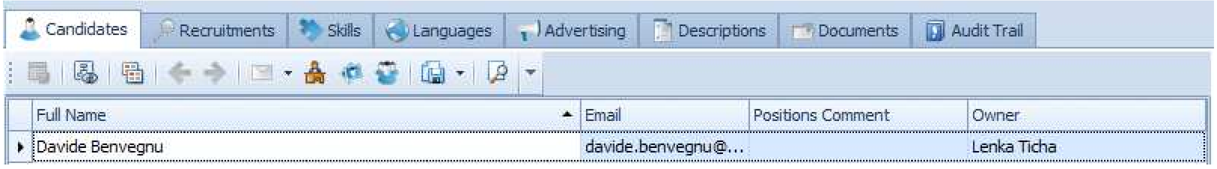
Select Position from the drop down menu of the “New” button. (Or simply click the “New” button when the active window displays position)
Fill out the required basic information to create the position and click on Save.

5.1.1 Basics



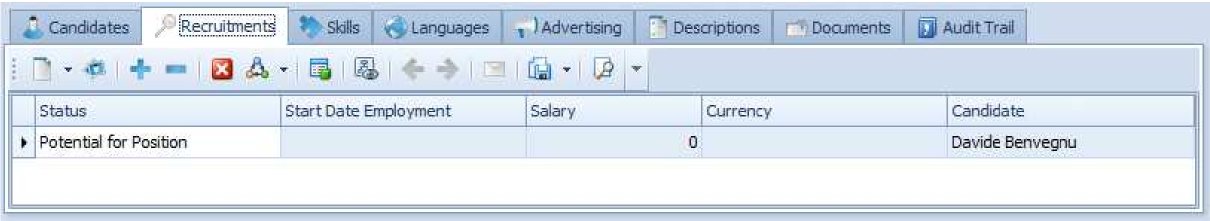
Fill out the relevant basic information as ID, status (active, urgent, closed), Title client is the name of position, Owner – HR consultant in your company, Industry and further information about client who offers the position.

5.1.2 Candidate



We see all candidates who are in recruitment process.

5.1.3 Recruitment

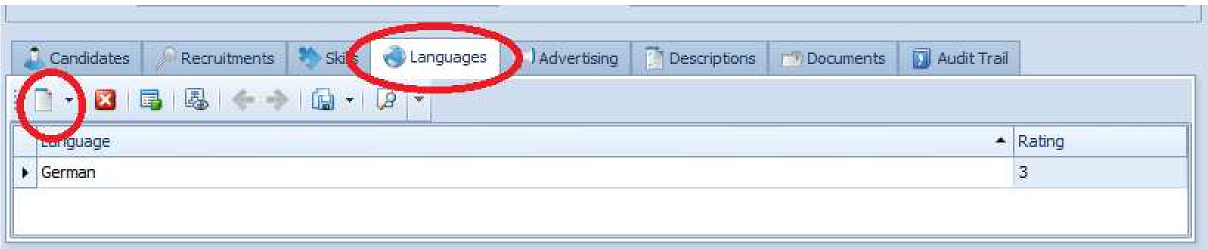


Here is the status of Recruitment process and the name of candidate.

5.1.4 Skills

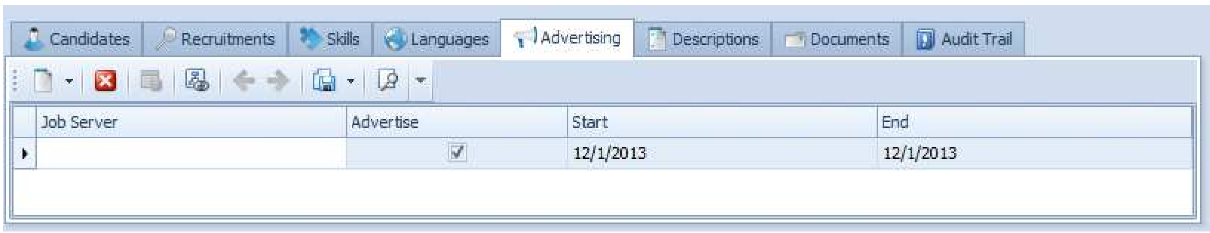
Fill in skills which are mandatory for client demand (position).

5.1.5 Languages



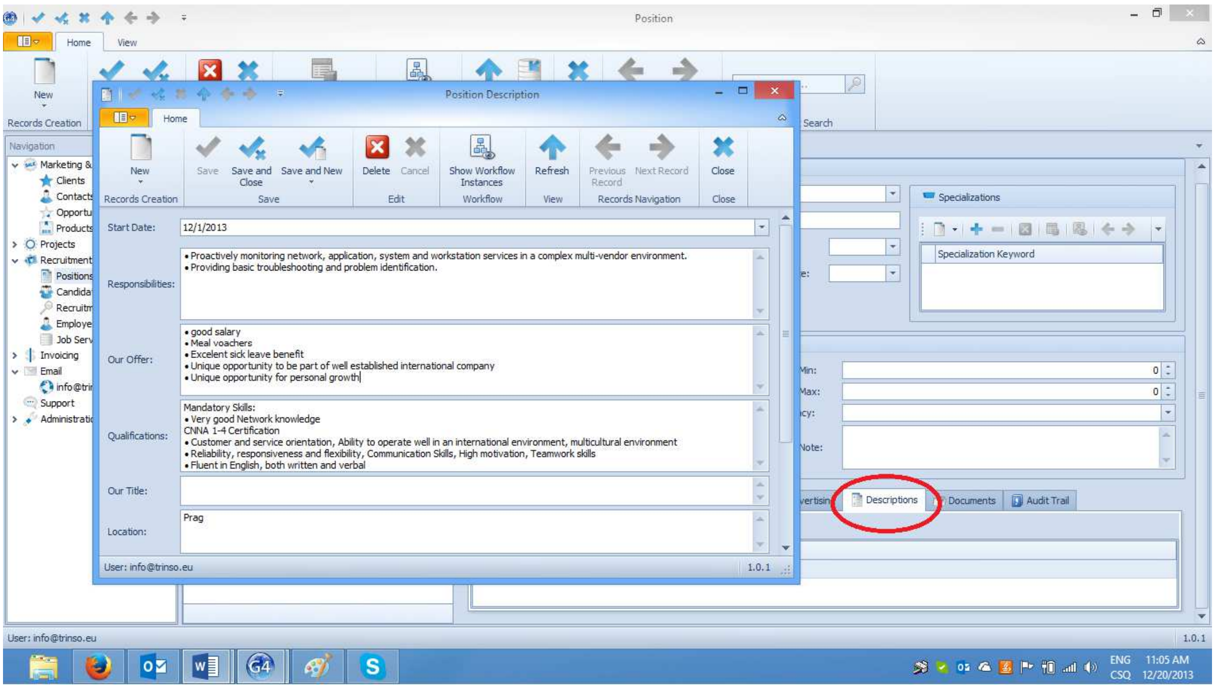
Fill in languages that are mandatory for client demand (position).

5.1.6 Advertising



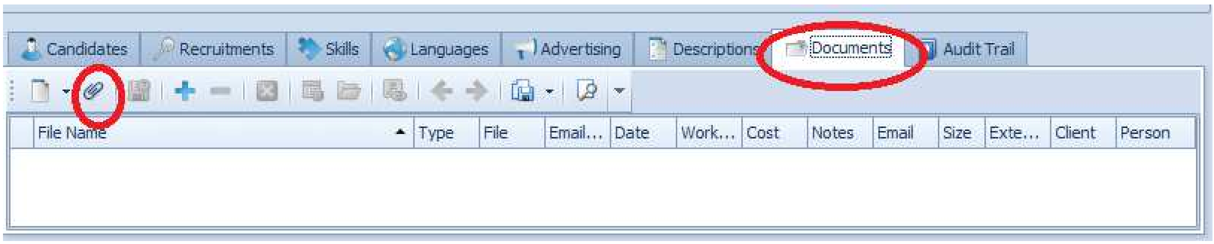
You can advertise position on job server for example on your web site and other job servers that you have contract with. Fill Start and End of advertising of the position.

5.1.7 Description



Fill Responsibilities, Offer, Qualifications, and other information for the position.

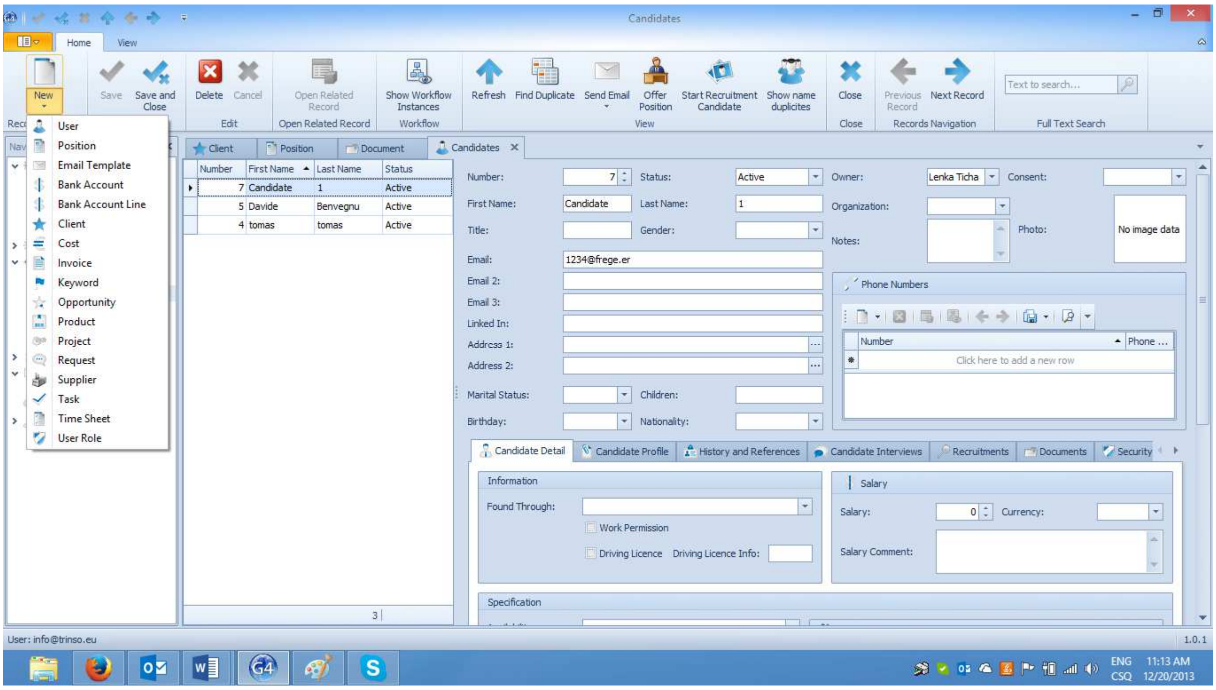
5.1.8 Documents



Attached document you wish to, for example description from client.

5.1.9 Audit Trail

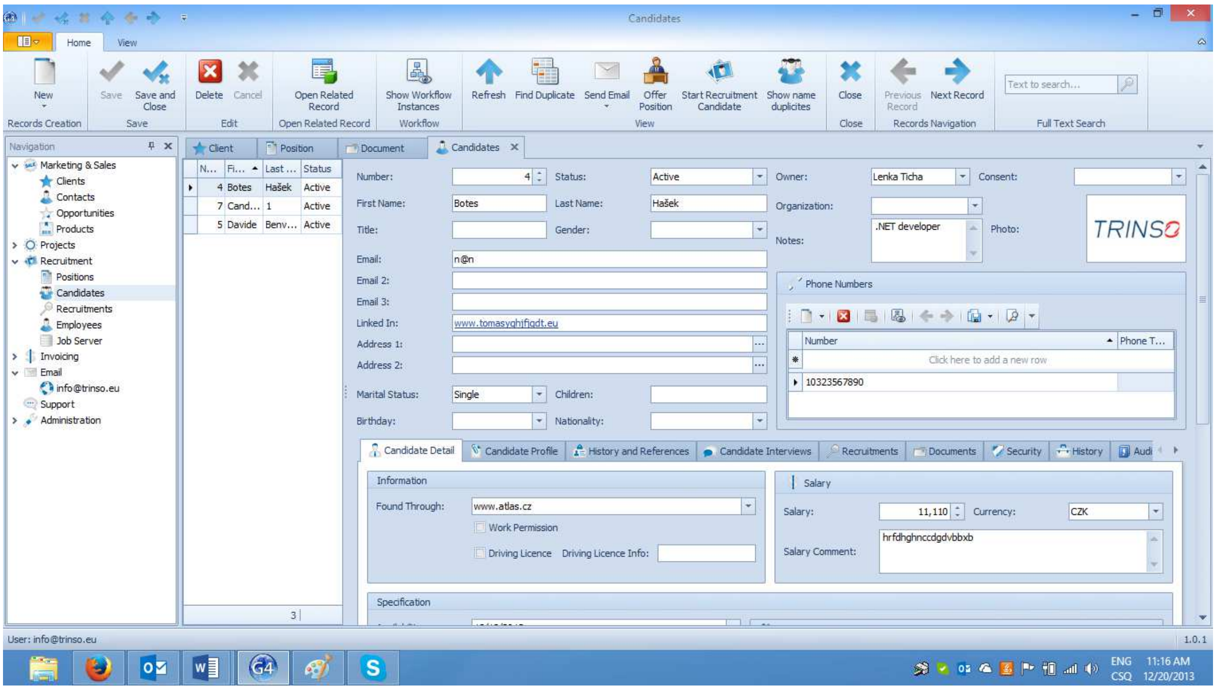
5.2 How to Create a New Candidate



To create new candidates just click on the new user in the top left corner of your screen when candidate list is displayed. When working in other window than candidate just click the bottom part of the "New" button to display list of creatable items. Choose User.

Fill out the relevant candidate data like name, address or contact email (is mandatory). Then click "Save".

5.2.1 Basics

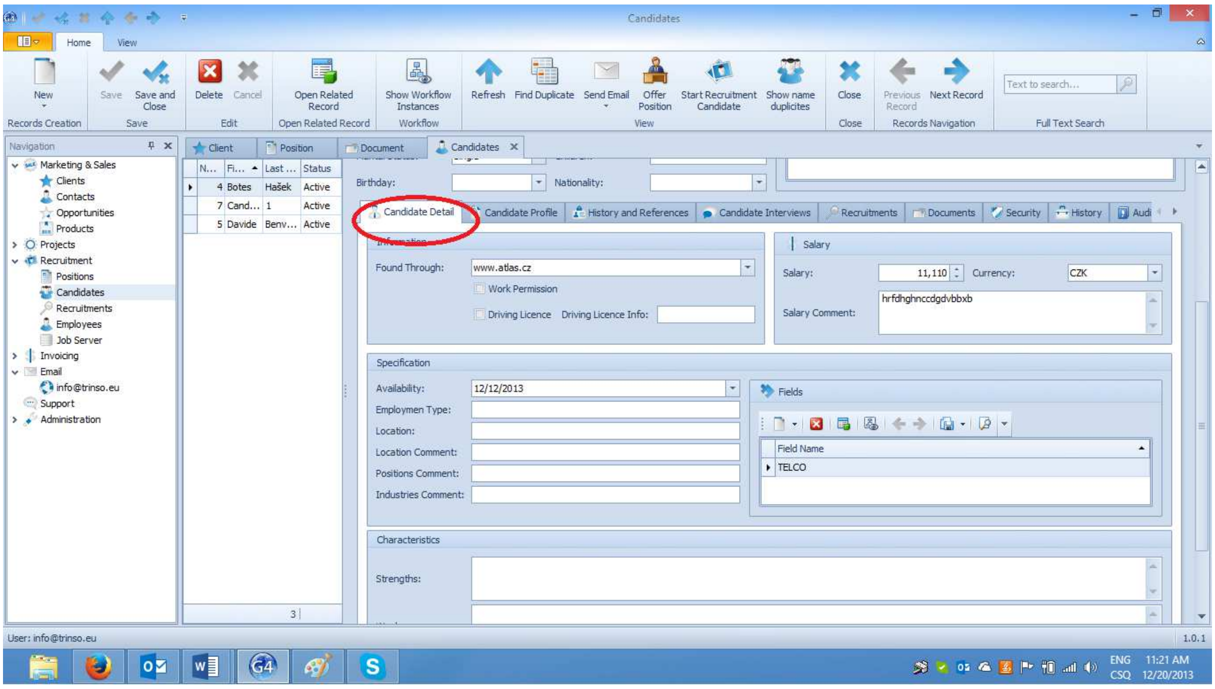


Now that you've created the candidate profile start by filling out his/ her details. Fill out information regarding the person's title, date of birth, photo, email address, phone etc.

You can add as many phone numbers as you can. Simply click on the new button marked on the picture above to add new number.
Tip: It is possible to add new number using "New Row line". Just click on a new row under Number and start typing.

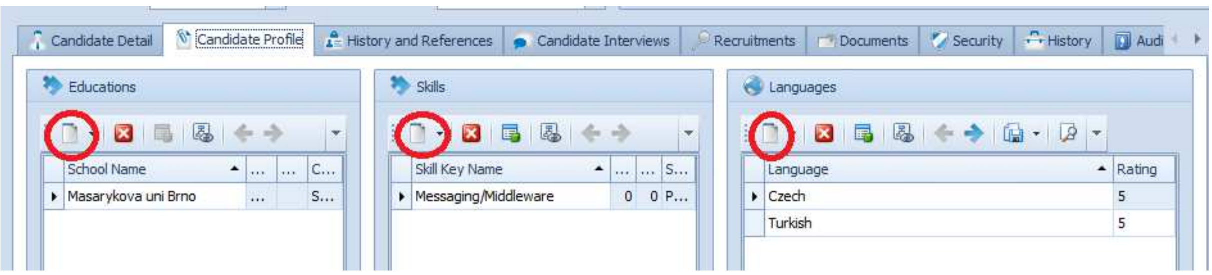
Field Consent is used for Validity on Consent on personal Data of client, it is a date from when you can work with client sensitive data.

5.2.2 Candidate detail



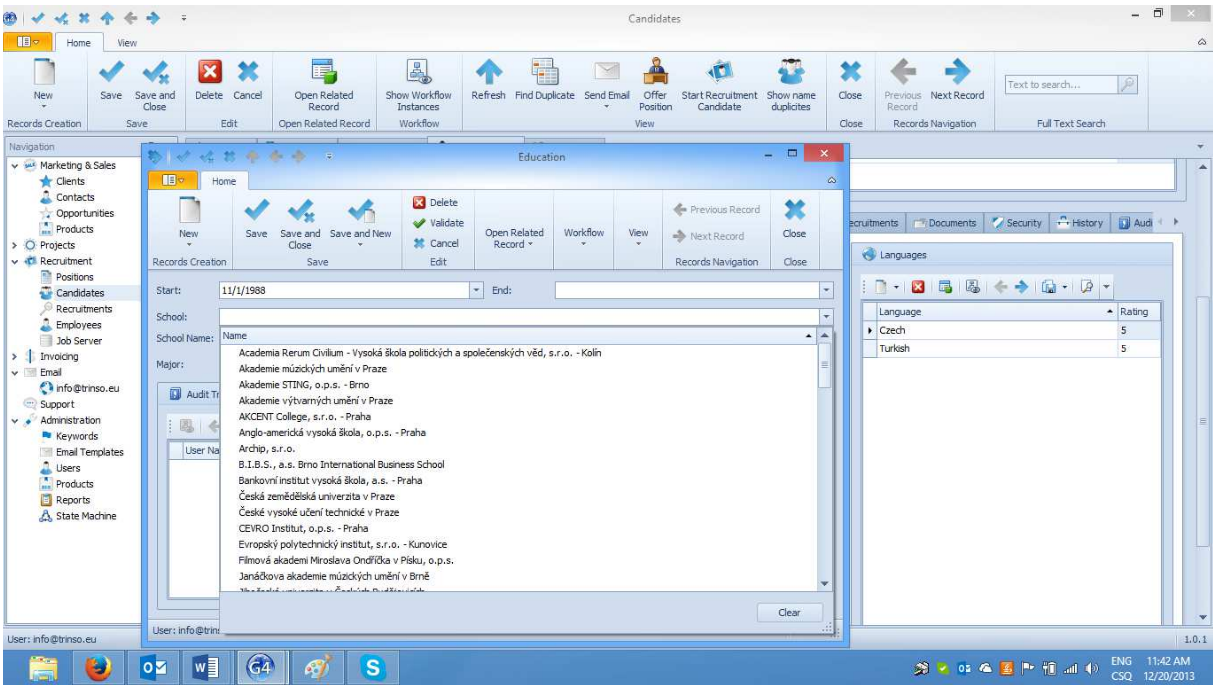
Fill in information such as salary information, specification (location client wish to work), Field (wished area of work) and characteristics (strengths, weaknesses).

5.2.3 Candidate Profile



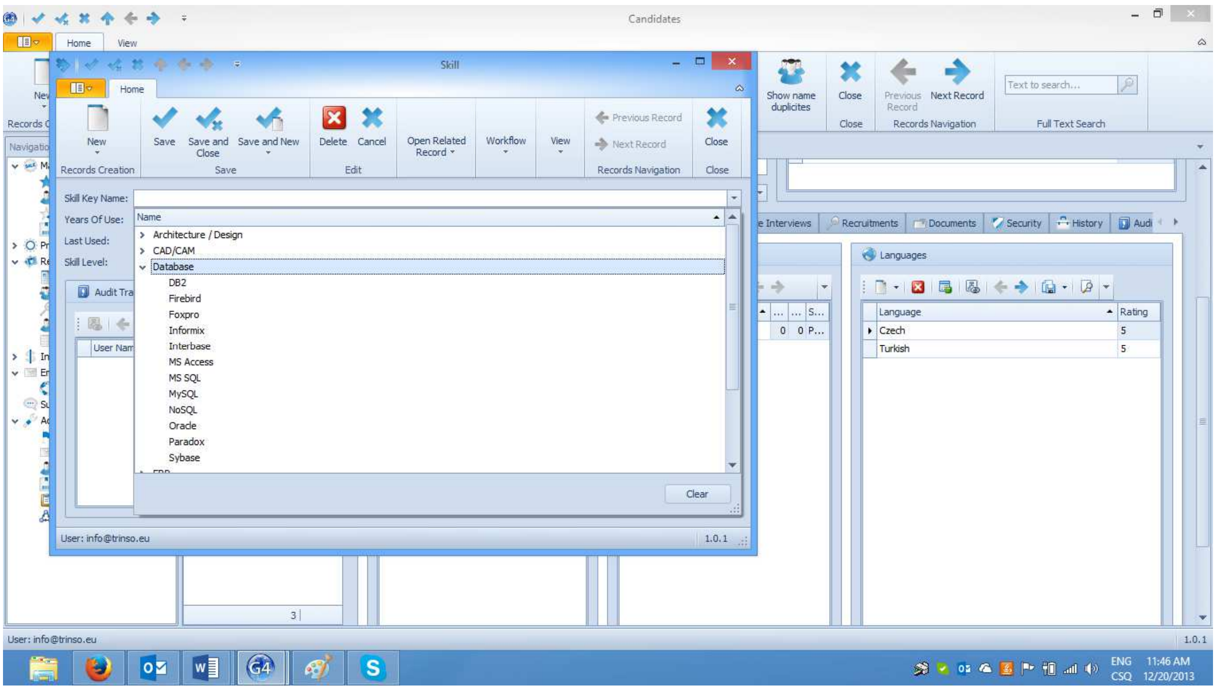
Fill in Education and Skills and Languages in Candidate profile.

Schools



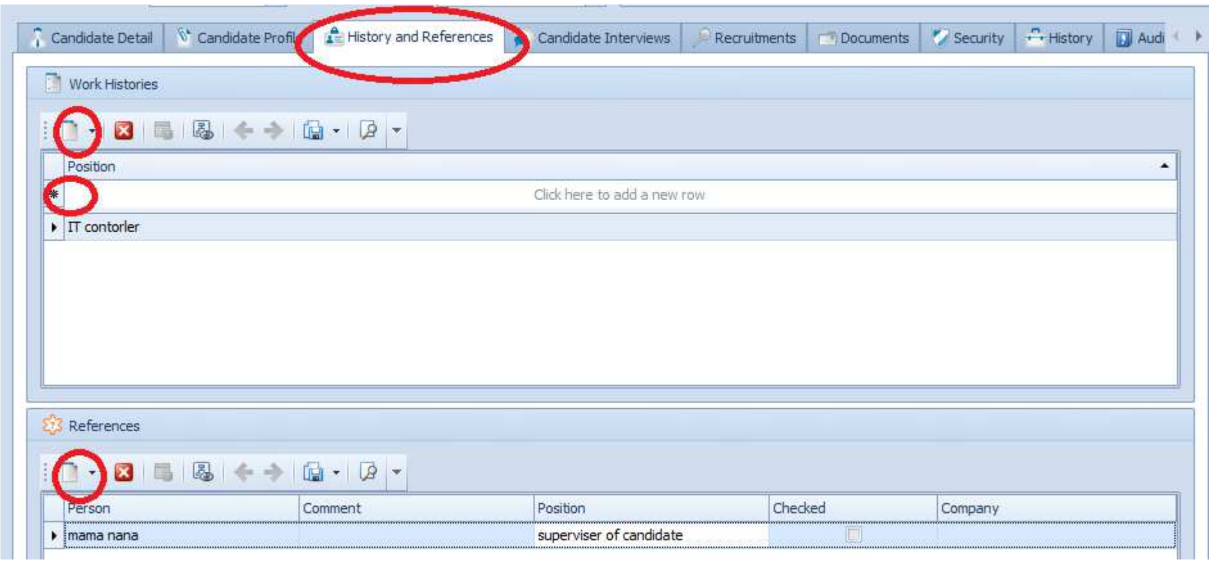
Fill in school name and other information about school, you can chose from Czechs school, but you can put other and type name of International University.
Tip: School name is a string value. You can type anything or create list of schools in administration under keywords. For more information see: 8.1

Skills



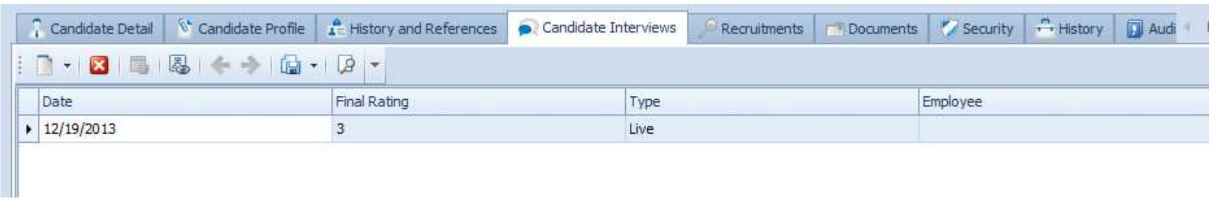
Select skill, platform and other information like last used or skill level.
Tip: Skill name is a predefined value. Skill names can be defined in administration under keywords. For more information see: 8.1

5.2.4 History and References

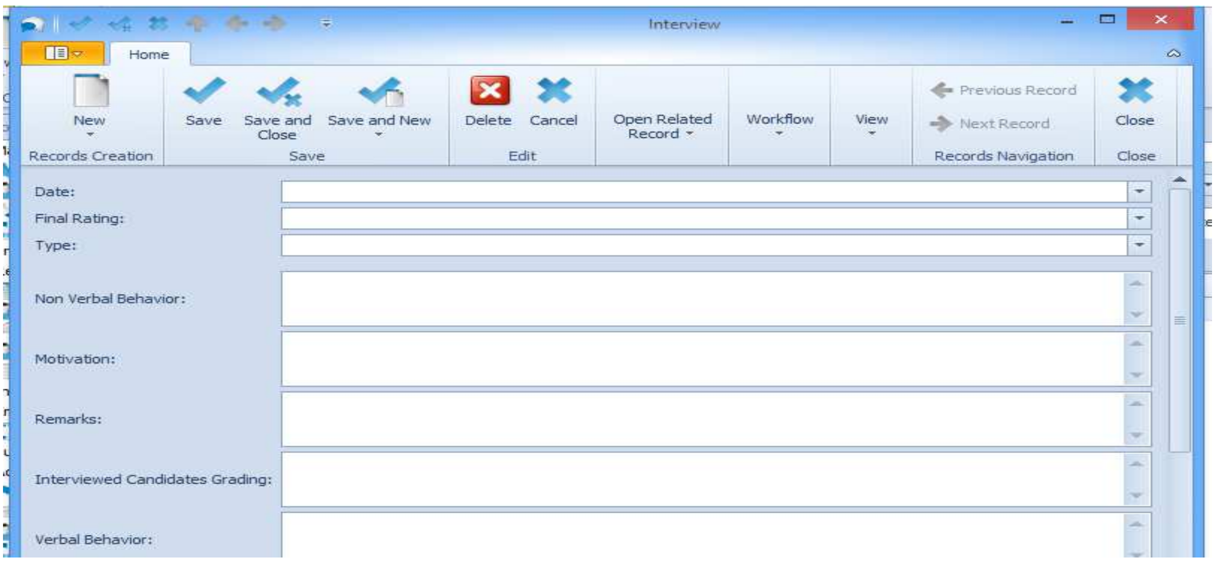


Fill in history of work of candidate and references. If you checked the references click on checked button.

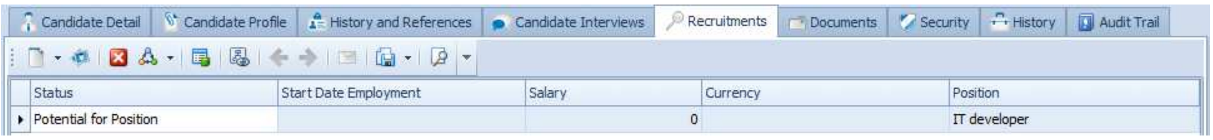
5.2.5 Candidate interview



Here are information about interview such as type (live, phone, video) and others.

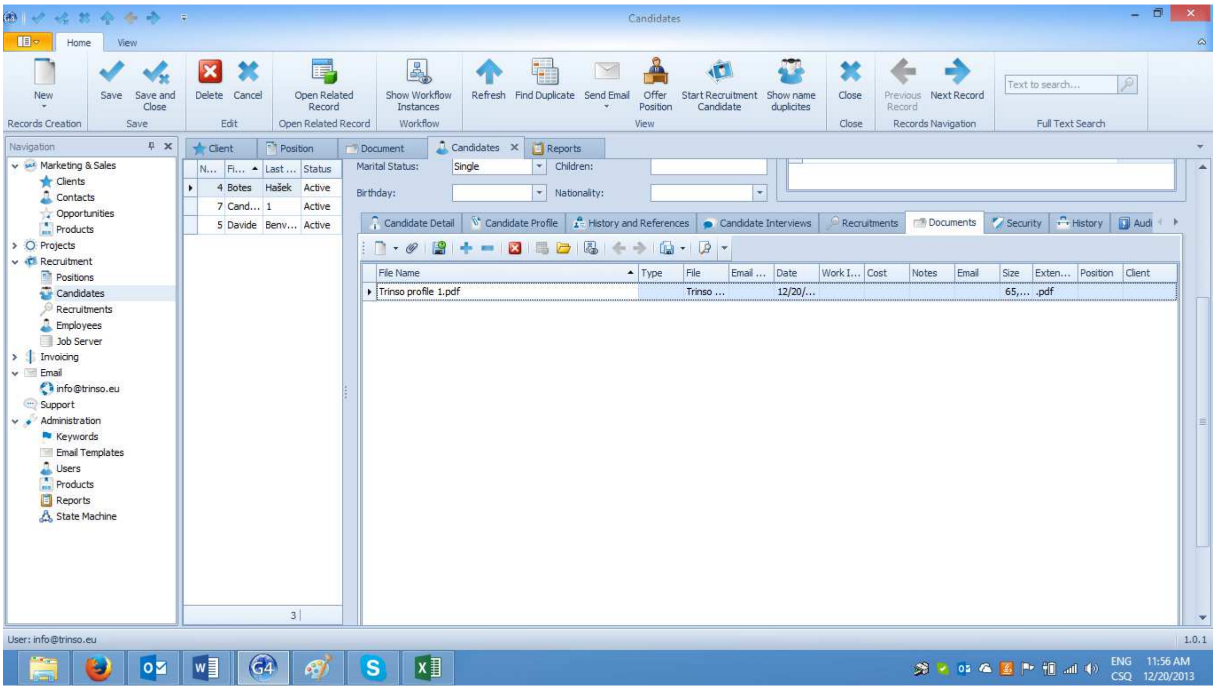


5.2.6 Recruitment



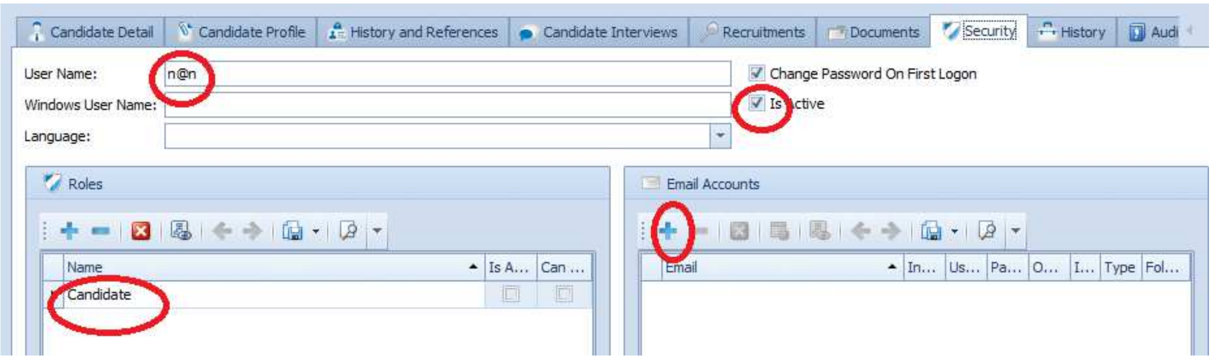
Add new skills by clicking the new button or choosing the first empty row.

5.2.7 Documents



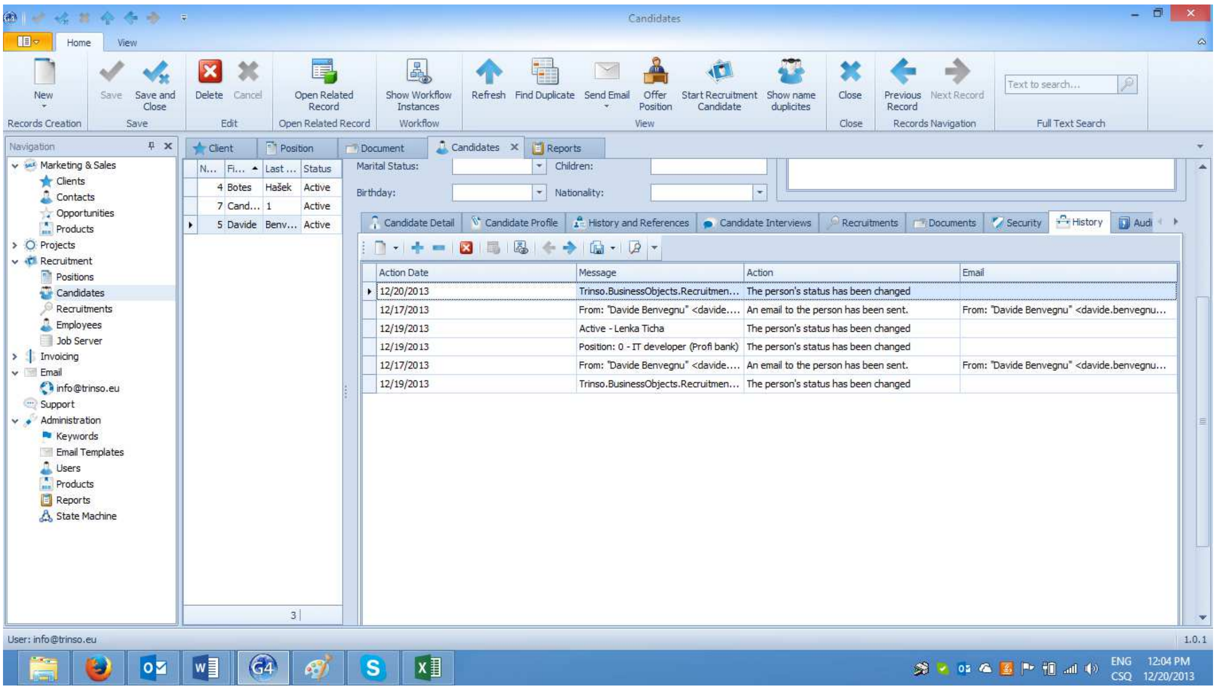
Attached document you wish to, please do not forget to save it and than open it.

5.2.8 Security



Security contains Roles (automatically goes user to candidate, if you open new candidate). You can give the candidate right (role candidate active) to enter, edit his/her detail data on web page. User name is an email address, password you will create with reset password for candidate. You have to check - Is active and then can candidate edit profile.

5.2.9 History



You can see in history tab all email communication with client and action which has been made with client account.

5.2.10 Audit Trial

Controlling tool

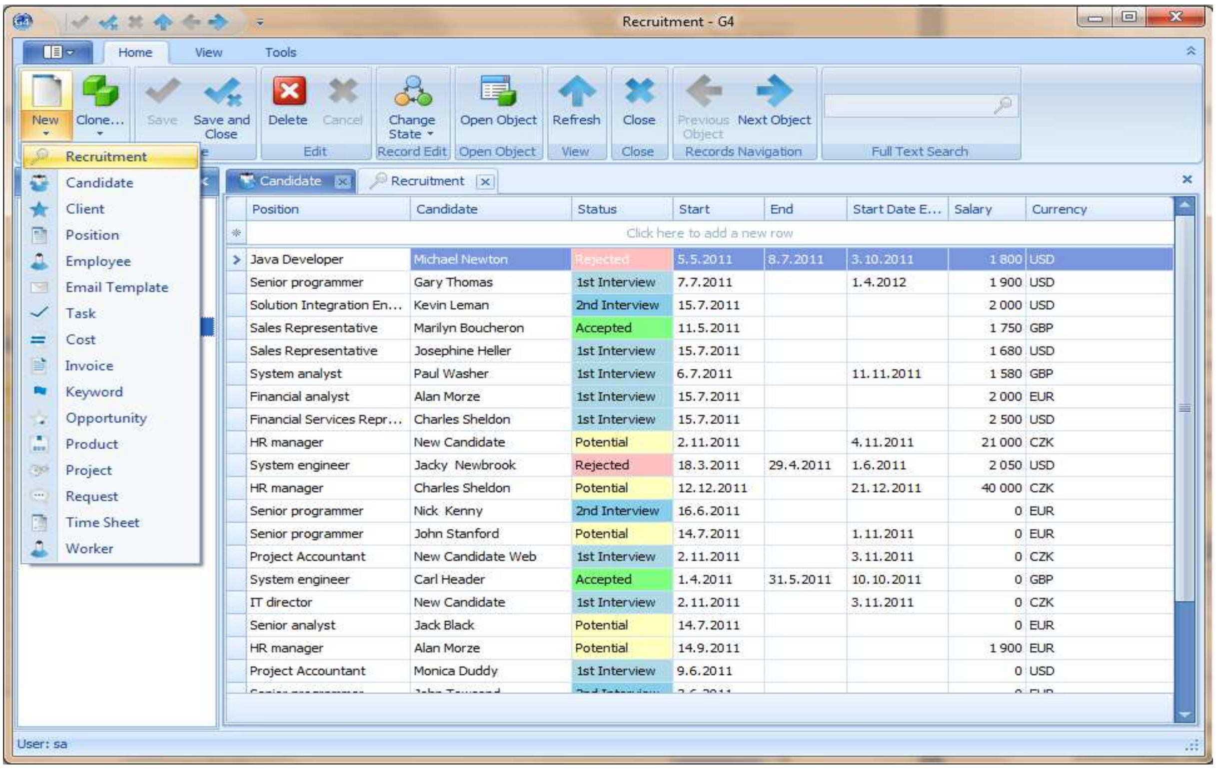
5.3 Recruitments

5.3.1 About Recruitment

To link a Candidate to a Position and vice versa a many-to-many relationship is needed. In simple – a Candidate can apply for a numerous position and for one Position it is possible to assign numerous candidates. For this purpose a table called "Recruitment" was created. This table contains information about Candidates applying for a position.

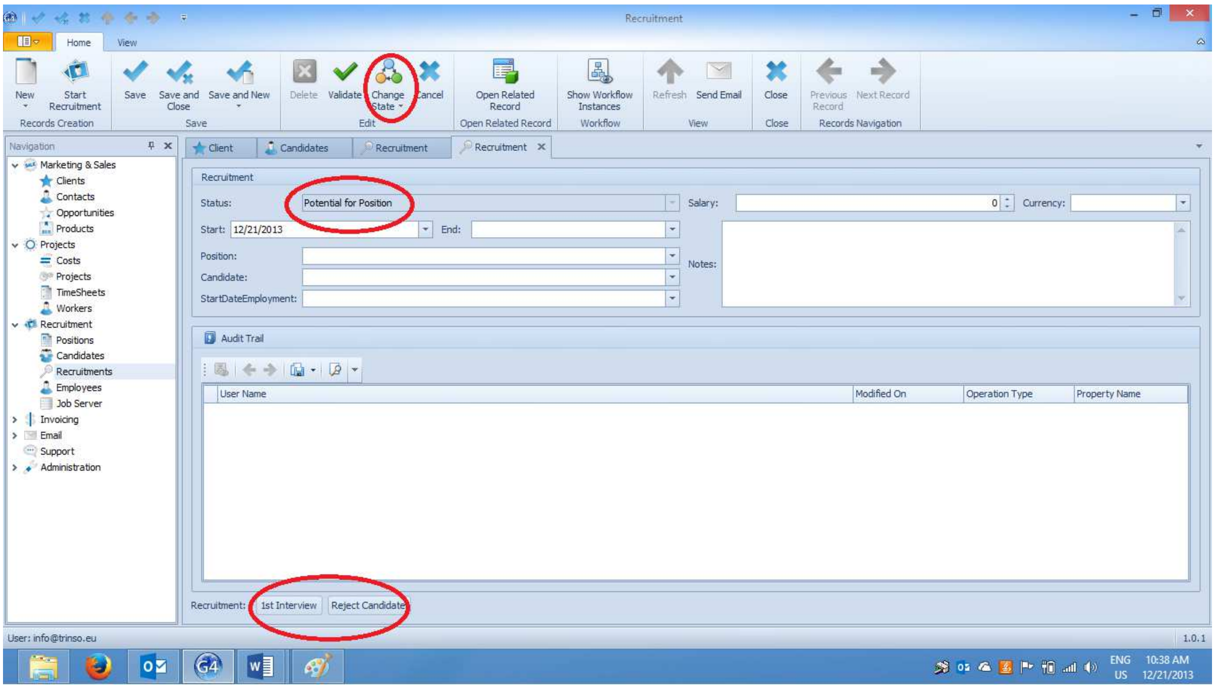
In G4 there is an Excel like table with all processes. It is possible to filter/group by Position or recruitment Status. This table is also available under Candidate and Position details, filtered by the given object. Under candidate you can find positions the given person is applying. Under Position you can find candidate list applying to that Position.

5.3.2 How to Start a New Recruitment Process



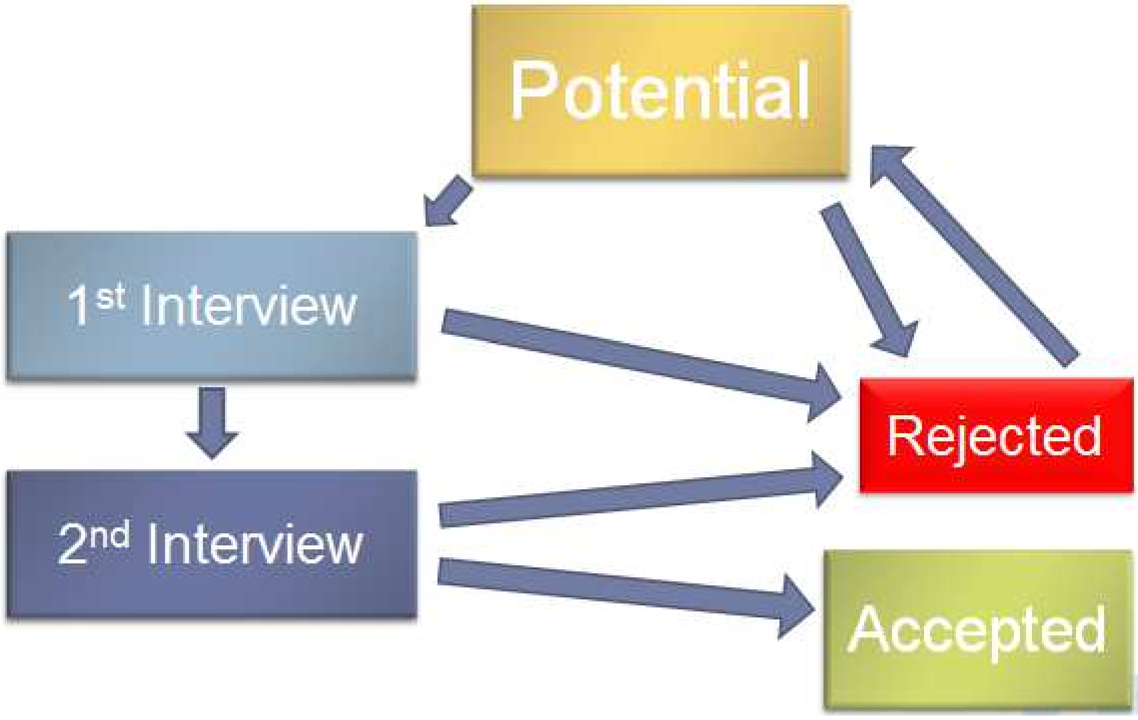
To create a new recruitment process just click on the new icon in the top left corner of your screen when Recruitment list is displayed. When working in other window than Recruitment just click the bottom part of the "New" button to display list of creatable items. Choose Recruitment.

5.3.3 Recruitment details



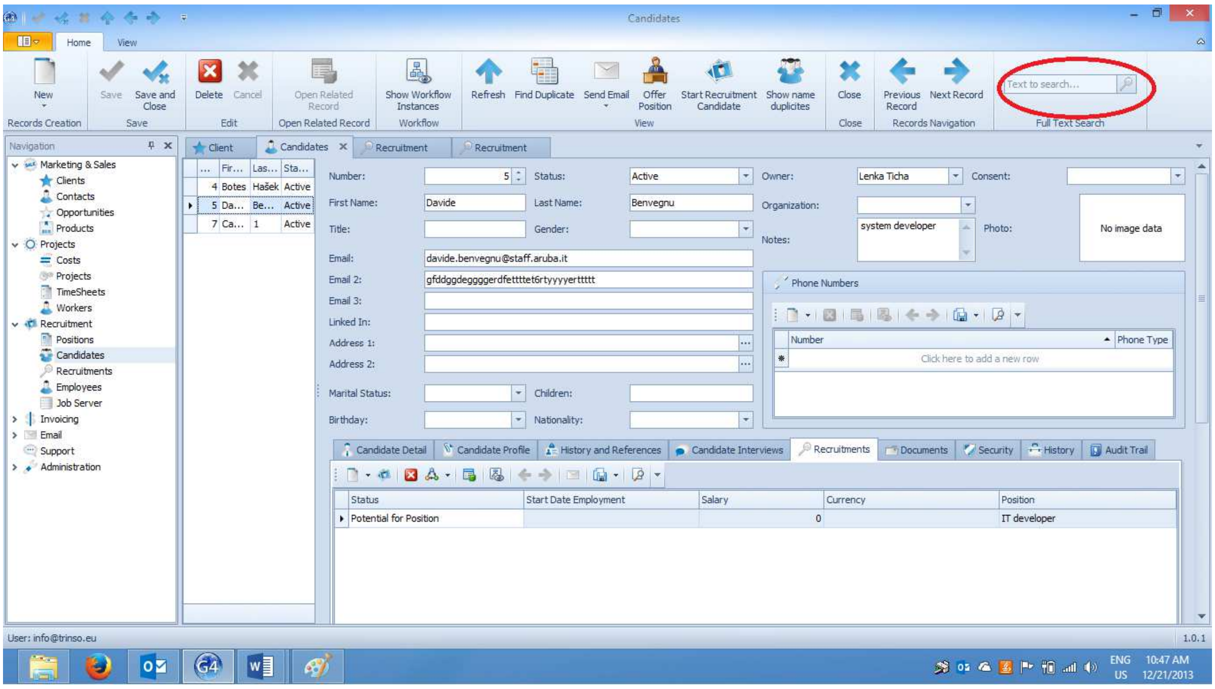
Select Candidate and Position. Status and Start date is filled automatically, first is always status Potential for position.
Status can be changed through "Change State" (Ribbon) or buttons on the bottom of the screen. Depending on the phase of the recruitment cycle the candidate is in you will be able to change his/ her status accordingly. Status attributes can differ depending on the stage of the recruitment cycle. Certain statuses (for example "Rejected") will prompt G4 to open an email template so you can inform the Candidate.

5.3.4 Recruitment States



The picture above shows the Recruitment State Machine. When a process is started a state called "Potential" is assigned. You can also edit this Process, for example to enter new state To contact in State Machine.

5.4 Full text Search in Documents



For candidate search, position search, client search you can use Full text Search tool.

Full text search includes a parametric search over candidates details combined with full-text search over documents. This tool is most used to search in CV and other documents to find specific figures that you wish to find inside the documents.

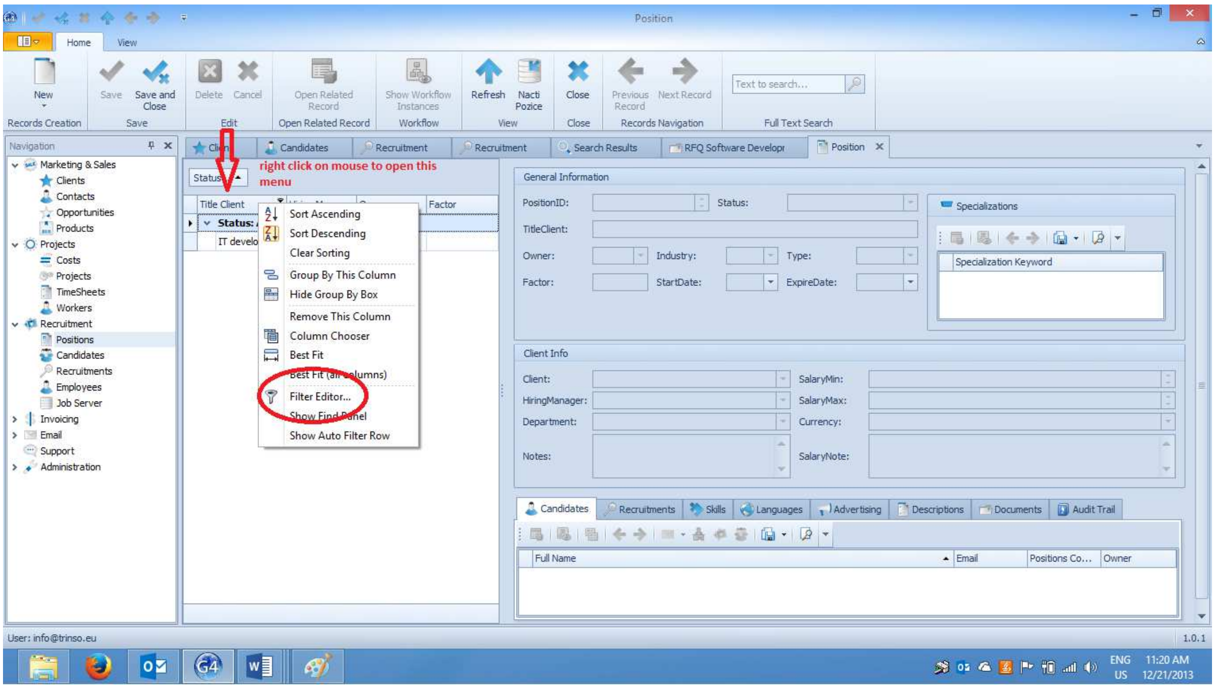
You can use this tool simple like a google search please write what you are looking for (for example: “Account payable”). The search goes automatically with “OR” operator.
If you would like to use “AND” operator you have to write “+” in front of the word you are looking for (for example +alexander +lead +developer).

5.5 Filter editor

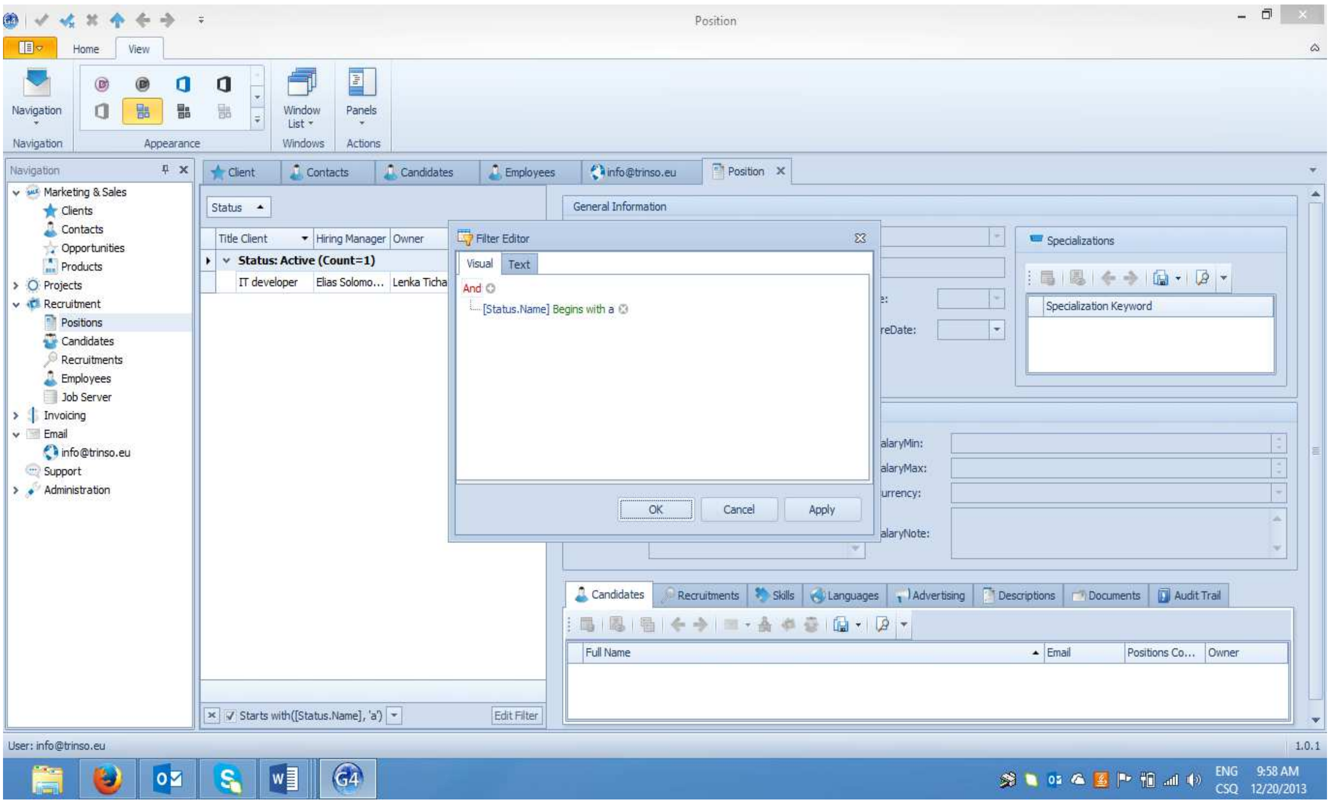
G4 contains also a very specific tool for detailed searching your candidates, positions, clients called „filter editor“. You need to do right click on context menu on any of the list (for example: list of candidates). You will obtain a really detail search, which will minimalize results that you are looking for. The most popular searching is for languages or skills. We can use all possible operator like a “and, or, begin with” etc…

5.5.1 Case 1 (search for active positions)

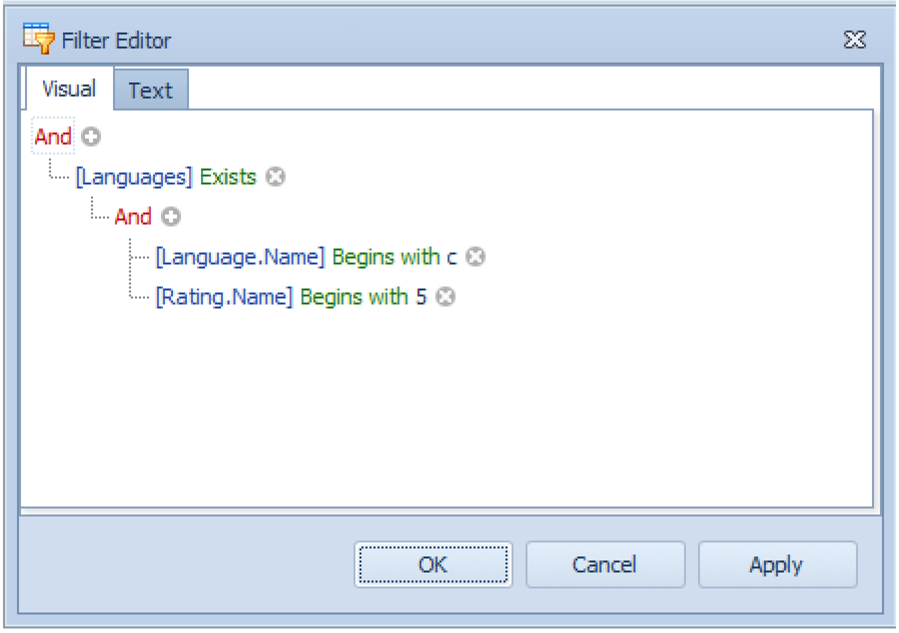
We would like to find all position with the status ACTIVE. In the list of positions we will open filter editor.



We will filter Status.Name in filter editor and use operator „begins with" a. You got the list of all positions with status Active.



5.5.2 Case 2. – Find Language Czech and Rating 5

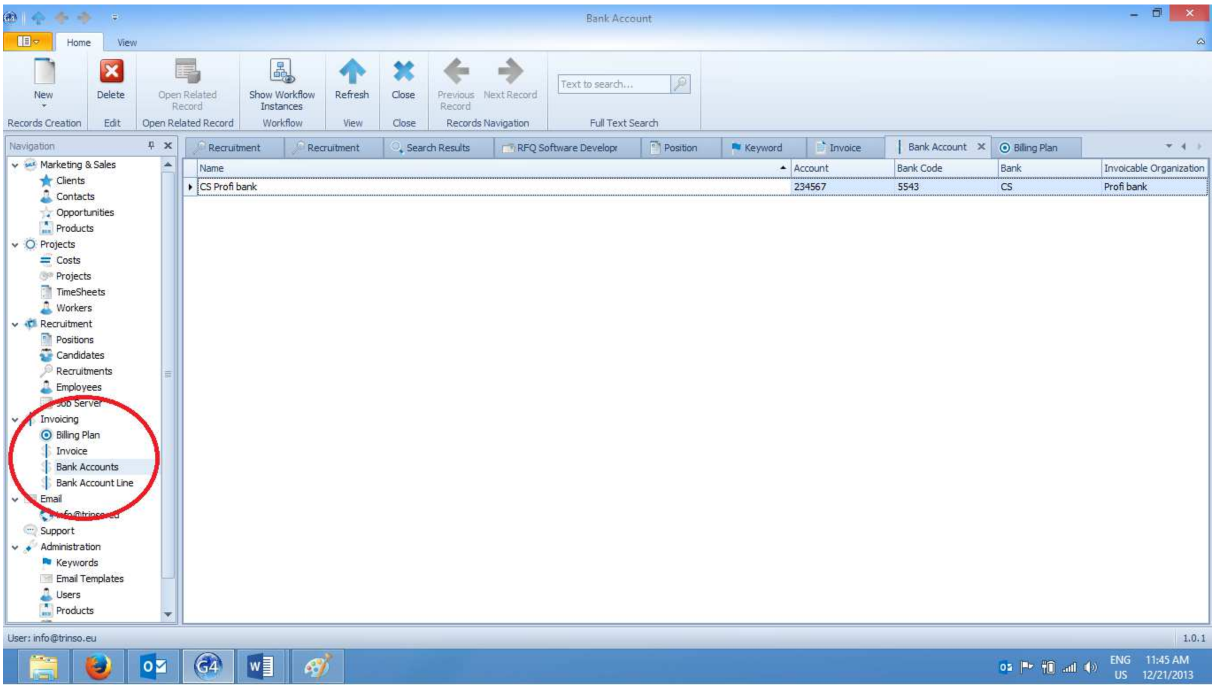


We will open a list of candidates and then „filter editor". You have to choose Languages (not Language) and then Language Name, for search use again „begins with" c (czech).

And (plus) Rating Name begins with 5.

6 Module Invoicing

6.1 Details

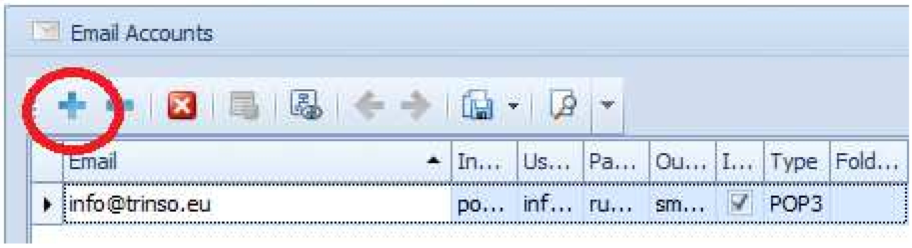


Invoicing module contains Billing Plan, Invoice (list of all invoice established for your clients), Bank Accounts (list of bank accounts information of your clients) and Bank Account Line can be connected direct to your bank institution, so you can have view of all bank transfers directly in you G4.

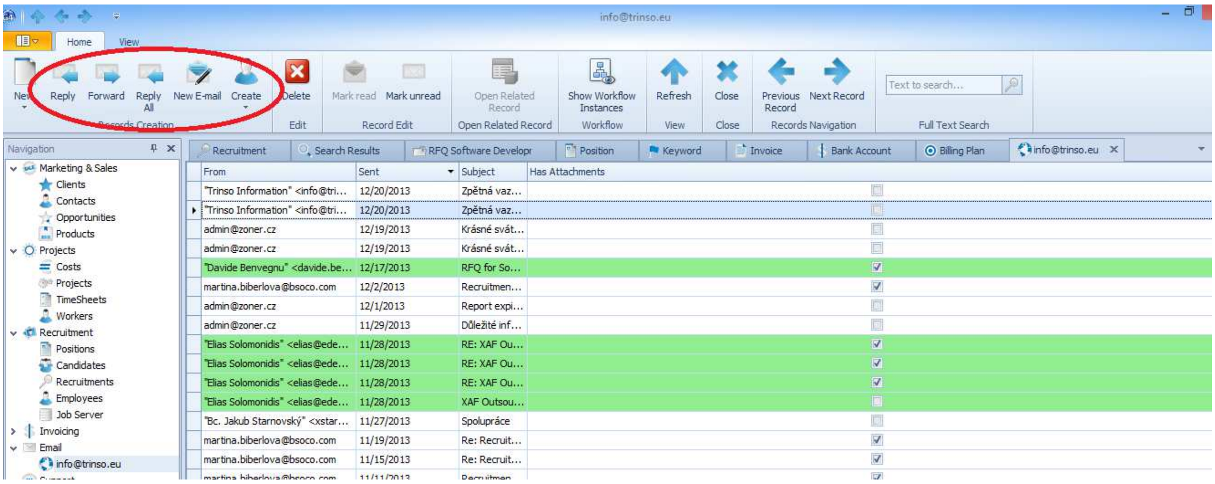
7 Module Email

7.1 Details

G4 contains a simple email client. It allows checking email accounts using pop3 protocol.



To configure this account use please in Security Emails Account. Please fill in mailbox configuration.

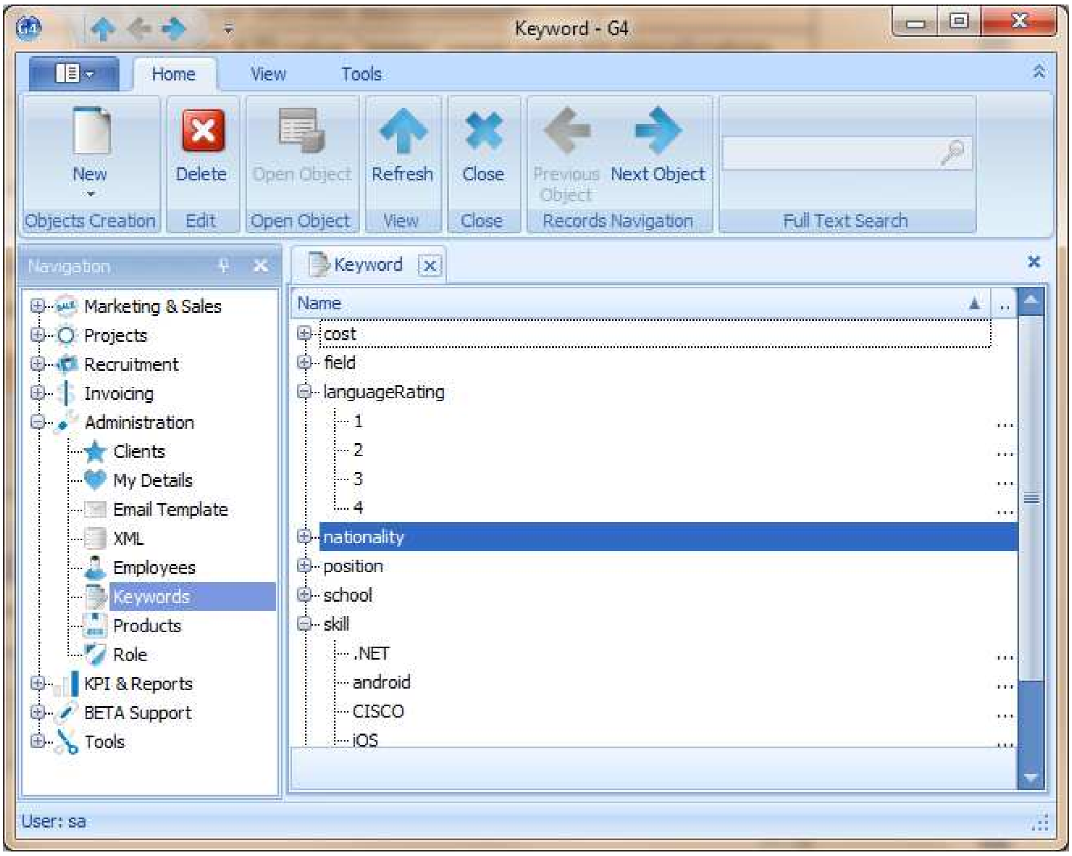


Under Inbox is a list of received mails. In the ribbon you can find basic mail functions like Reply, Forward, etc.

Support

8 Administration

8.1 Keywords



Contains list of configurable enumerations used in various drop down fields. E.g. language ratings, school list, etc. It has a strict structure, which means the main categories have to remain intact. To create new keyword select desired category and hit the "New" button.

Make sure the Parent field displays the desired category. Fill the name and hit "Save"
Tip: Hit "Save and New" if you want to create more keywords in the same category.

8.2 Email Templates

When sending emails to Candidate a template is used. Here you can add or modify these templates. **Target** field defines if the template mends to be used in recruitment or when sending direct mail to candidate. **Type** defines the step of recruitment process. E.g. when sending candidate to 1st interview a different template is used when sending him/her to 2nd interview or rejecting him/her.
The following special fields can be used in templates:

<%this.Candidate.LastName%>	Candidates last name
<%this.Position.TitleClient%>	Title of the position
<%this.Position.Client.Name%>	Clients name owning position
<%CurrentUser.FullName%>	Current users full name
<%this.Position.Client.Address1%>	Clients address
<%this.Position.HiringManager.FullName%>	Hiring managers full name

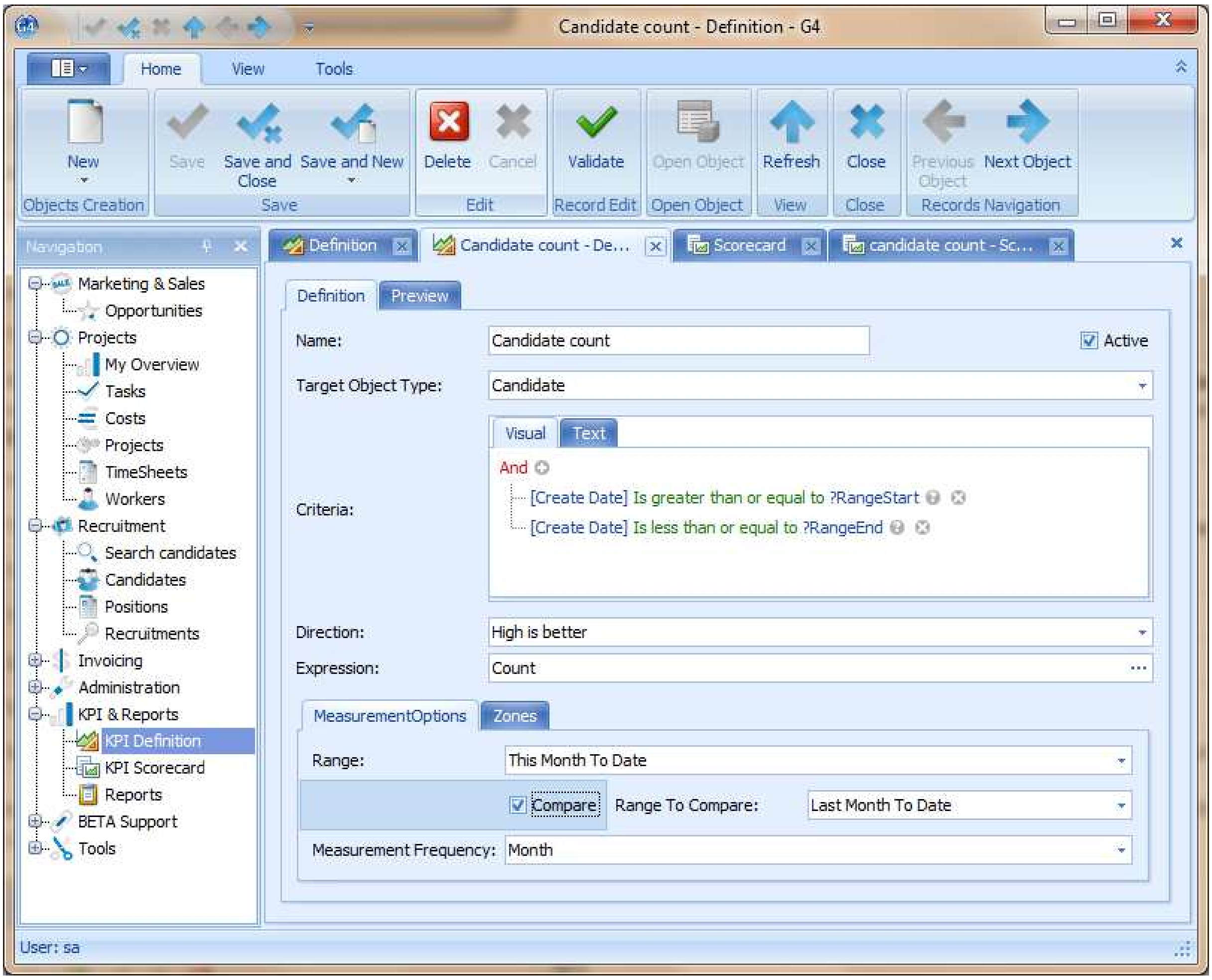
8.3 Settings

8.4 Users

All users who are using application.

8.5 Key Performance Indicators (KPI)

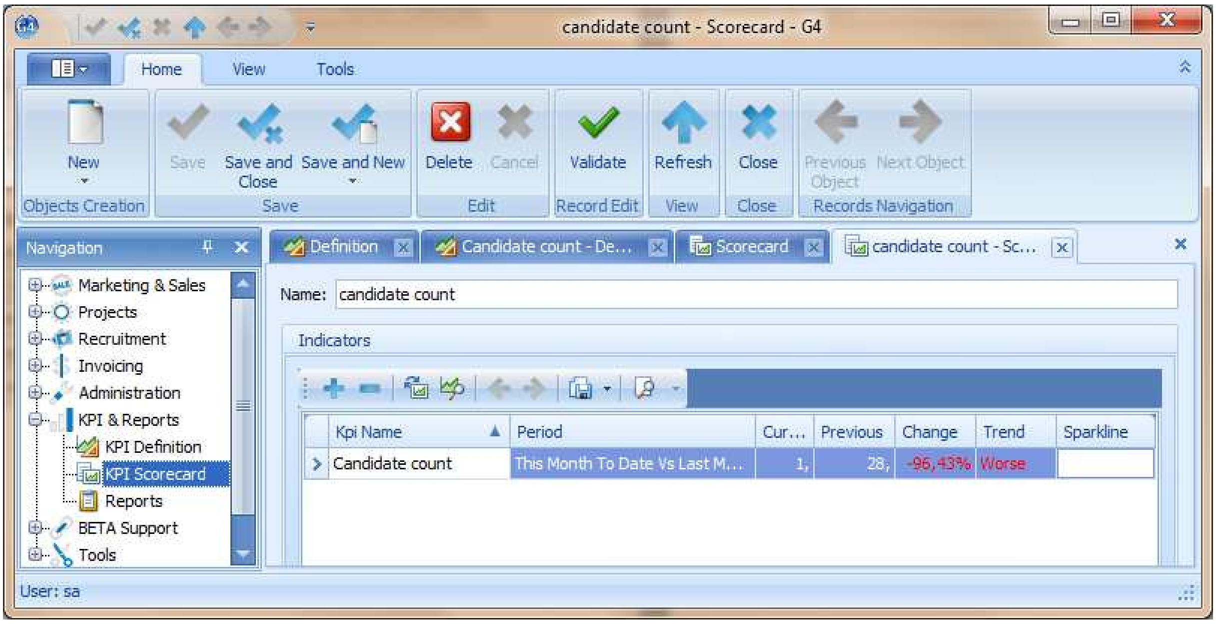
Key Performance Indicators (KPI) are quantitative measurements of dynamic business processes. For instance, important performance indicators for a developer team are the number of active bugs in their product, etc. For better visualization, KPI value ranges can be split into a "green zone" (everything is OK), "yellow zone" (warning), and "red zone" (things are problematic). When KPI are based on a time range, it can be useful to compare values of different periods (for instance, the current month against the previous one).



Name	KPI name
Target Object Type	The type of business object KPI is designed for.
Criteria	Specifies the Criteria Language expression that is used to filter a collection of objects being analyzed. In KPI criteria, two extra parameters for DateTime properties can be used – “RangeStart” and “RangeEnd”. These parameters represent a measurement range specified by the Range property.
Direction	The Direction { LowIsBetter, HighIsBetter } enumeration value specifies how to treat deviation from a previous measurement result.
Expression	An expression that is used to evaluate KPI - Sum, Count, Avg, etc.
Range	The period to analyze.
Compare	The Boolean flag that indicates if KPI current values should be compared to previous values, calculated using the **Range**

	To Compare period.
Range To Compare	The past period to be compared with **Range**.
Measurement Frequency	The time span between measurements.
Green Zone	Specifies the KPI value "green" range used for visualization.
Red Zone	Specifies the KPI value "red" range used for visualization.

In a Preview tab, the current KPI value and a collection of objects used to calculate KPI are available. To view and analyze the collection of KPI, the Scorecard, which is an object exposing a collection of KPI, can be used. Under the Scorecard navigation item, Scorecards with linked KPI can be created.



8.6 Reports

To make business applications especially useful for managers and other end-users who analyze information, G4 provides the Reports module. This module allows designing and printing reports easily. The Reports module uses a reporting engine. This engine provides the Designer which allows creating, previewing and customizing reports.
How to create and customize reports is described here:
http://documentation.devexpress.com/#Xaf/CustomDocument2734

8.7 User roles

Each user has a specific role to enter G4. User roles differ which a right to read, write, navigate, delete and create objects. Basic roles which are already created are:

8.7.1 Administrator

8.7.2 Employee

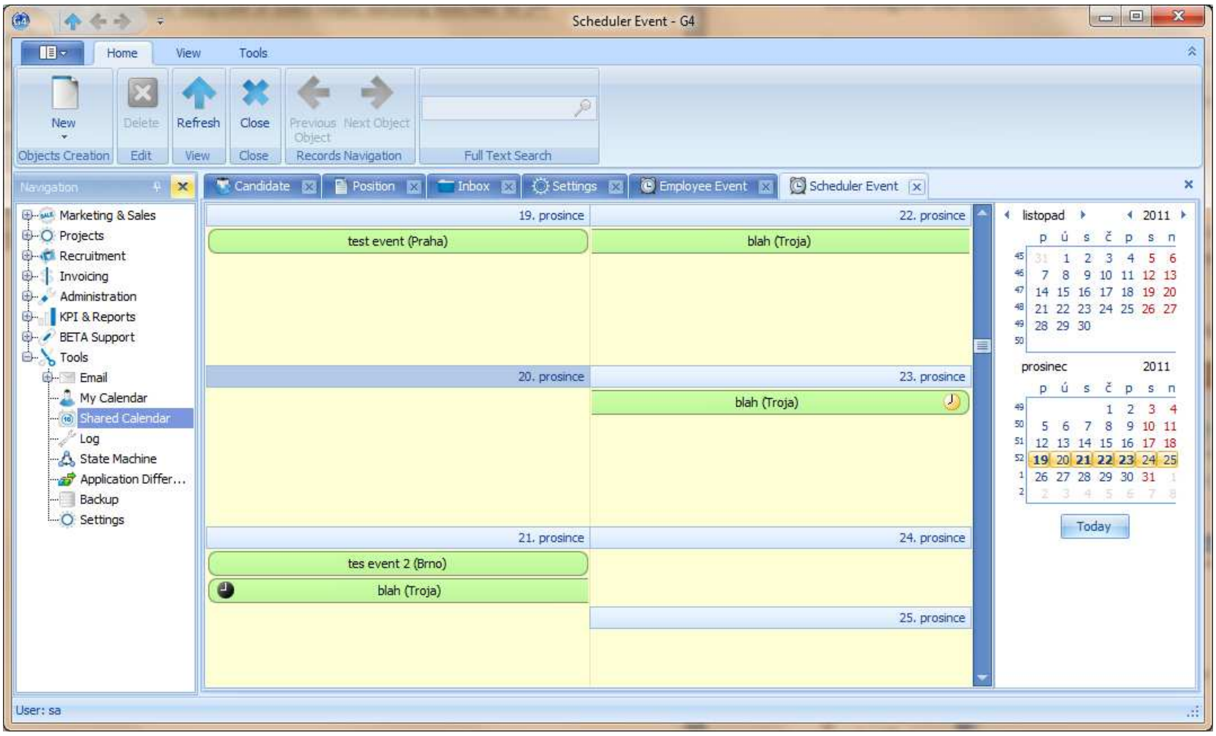
8.7.3 Worker

8.7.4 Candidate

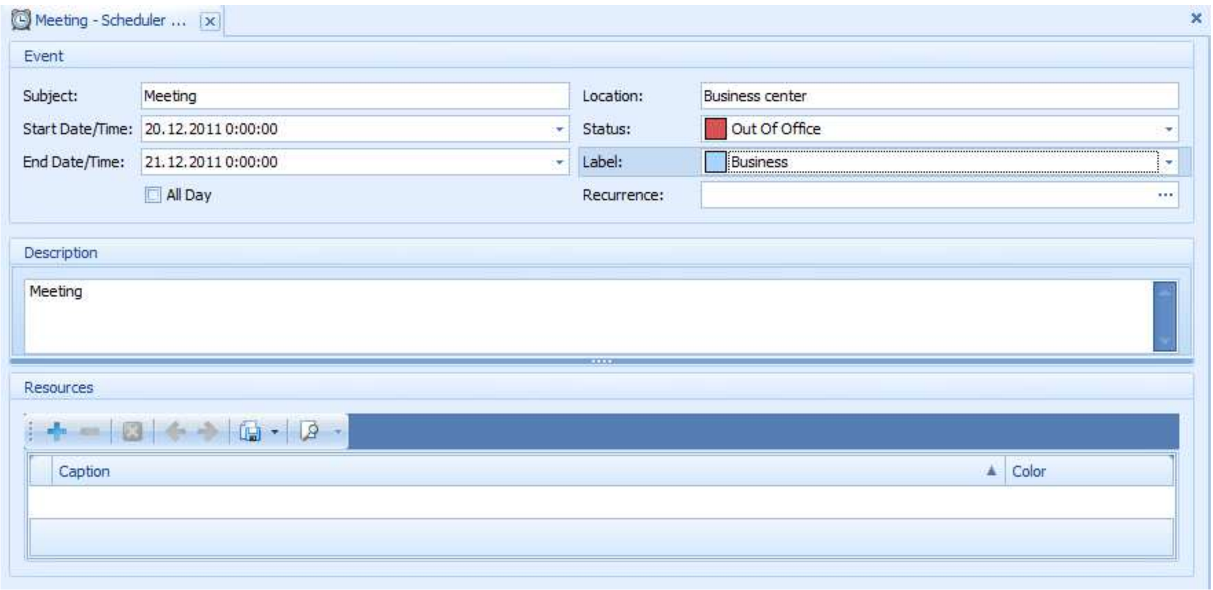
8.7.5 Contact

9 Tools

9.1 Calendar



G4 contains an Outlook like calendar feature.



To create new event simple click on the “New” icon on the upper left corner and fill in relevant information.