

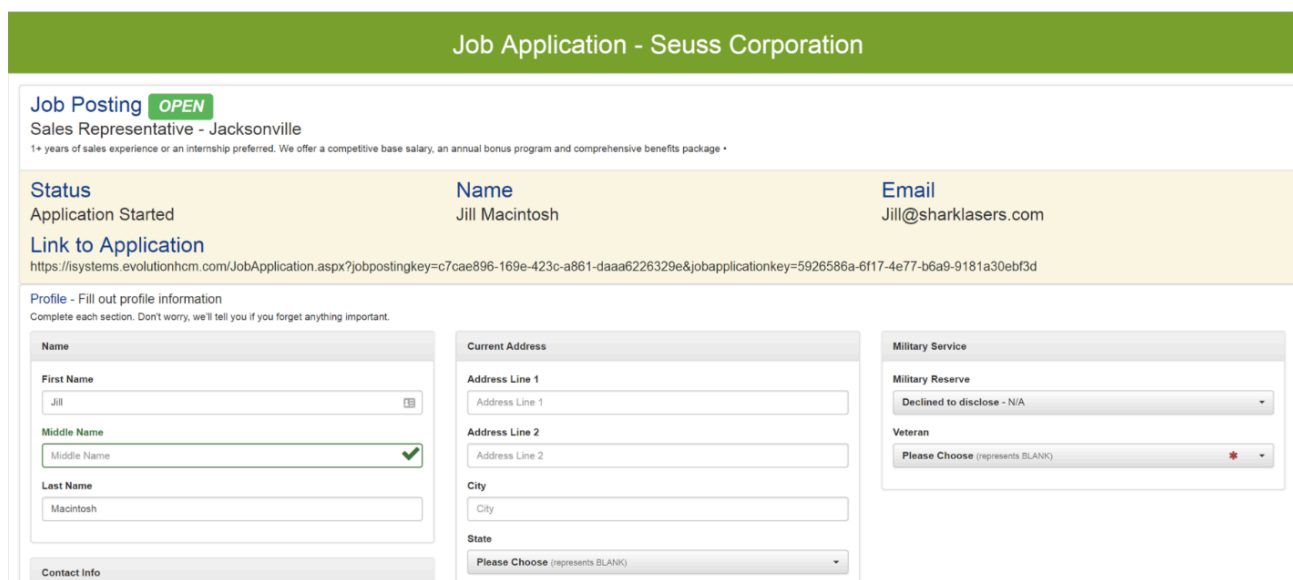
## Applying for a Job with Advanced HR 2.0

Now that you done all the Applicant Tracking Setup, let's walk you through how the applicant would apply for a job.

When an applicant follows the link to job posting, they'll be taken to the Jobs Site.



After entering their Name and Email address, the applicant is taken to the application wizard. The wizard will walk the applicant through the application process.



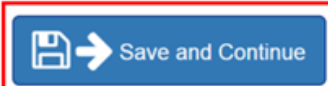
When each section of the Wizard is completed, the applicant will click the **Save and Continue** button.

The screenshot shows a web form with two main sections. The left section, titled 'Contact Info', contains three fields: 'Email' with the value 'Jill@sharklasers.com', 'Home Phone' with '802.546.6596', and 'Cell Phone' with '846.513.1816'. Each field has a green checkmark icon to its right. The right section contains a 'State' dropdown menu set to 'VT - VERMONT, US', a 'Zip Code' field with '05232', and a 'Length at current address' field with '10 years'. Below these is a 'Previous Address' section with a text field containing 'Previous Address'. All fields in the right section also have green checkmark icons. At the bottom left, a blue button with a floppy disk icon and the text 'Save and Continue' is highlighted with a red rectangular border.

Contact Info	
Email	Jill@sharklasers.com ✓
Home Phone	802.546.6596 ✓
Cell Phone	846.513.1816 ✓

State	
State	VT - VERMONT, US
Zip Code	05232 ✓
Length at current address	10 years ✓

Previous Address	
Previous Address	Previous Address ✓

 Save and Continue

This will advance the applicant to the next screen.

When the applicant has completed all the sections, they will sign and **Submit** the application

Once submitted, the applicant will receive an email confirmation. They can use the link contained within the email view their application.



Admin and Manager level users can access the applicant from the **Applicant Tracking Dashboard**. Using the **Status/Workflow Change** button, they can move the applicant through the hiring process.

### Hiring the Applicant

One of the last steps in the hiring process is changing the **Status** to **Prep for Onboarding**. When this is done, and **Save Changes** is selected, the user will be taken to the **Onboarding Prep Process** screen so the New Hire can be hired.


# OnBoarding Prep Process

## Prep Employee for OnBoarding


### STEP 1 - Type of Hire


The information below helps to guide you through the rest of the OnBoarding process.

**Company**

 Seuss Corporation (SEU) ▼


**Tax Form (Type of Hire)** **Hire Date**


W2 - Employee ▼ 08/08/2017 

**Position**  **Employee ID**

SR - Sales Representative ▼ 190

**Onboarding Task List**

Please Choose (represents BLANK)  ▼

Let's begin OnBoarding 

## Prep for Onboarding Process

Fill in the pertinent information shown on the previous screenshot, select an Onboarding Task, and click **Let's begin Onboarding**.

Complete **Step 2** by filling out the pertinent information. It is important to pay close attention the blue **Quick Add User** button. This will allow you to create a user in the system (attaching them to the company and assigning them the correct security role).

### STEP 2 - Fill out Employee information

Complete each section. Don't worry, we'll tell you if you forget anything important.


#### Profile

**Contact**

First Name  ✓ Last Name  ✓ Email  ✓



#### Compensation

**Pay Type**  ✓ **Default Hours**  ✓

**Pay Frequency**   **Auto Pay**

**Rate**  ✓

#### Employment

<b>Position/Status</b>	<b>Organization</b>	<b>Compliance</b>	<b>Reports To/Supervisor</b>
<input type="text" value="Employment Type"/> 	<input type="text" value="Division"/>	<input type="text" value="EEO Category"/> 	<input type="text" value="Reports To"/>


## Quick Add User

As part of Onboarding, it is highly recommended that you create a user while you are entering the preliminary information for the New Hire.

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User

Select existing user (type to search)

 type to search

×


Quick Add User

The **Quick Add User** popup allows you to add a user to the system with the most important fields:

- Create Username
  - Edit Contact info
  - Send a Welcome Email
  - Assign a Role
-




## Quick Add User



Remember that usernames (emails) must be unique to the system. We will verify that your new user isn't already being used.

This is meant as a quick way to add a user to the system with the most important fields. If other details about the user are to be entered, please visit the User List page after completion here to review or add those other details.

User

Username 

TFA Active

No

Yes

Send Welcome Email

No

Yes

Assign a Role


Please Choose (represents BLANK)


Contact

First Name

Last Name

Timezone

Eastern (US and Canada) (UTC-05:00) 

 Add User

**Assign a Role** at this time. This will allow the new hire a level of access to the system that is dependent on their function within the company. In addition you can **Send a Welcome Email**. The Welcome Email will instruct the new hire how to access **Self Serve Onboarding**.

Click the blue **Add User** button when complete. You'll be taken back to the **Employee Summary** screen. Remember to click the green **Link User** button to link:

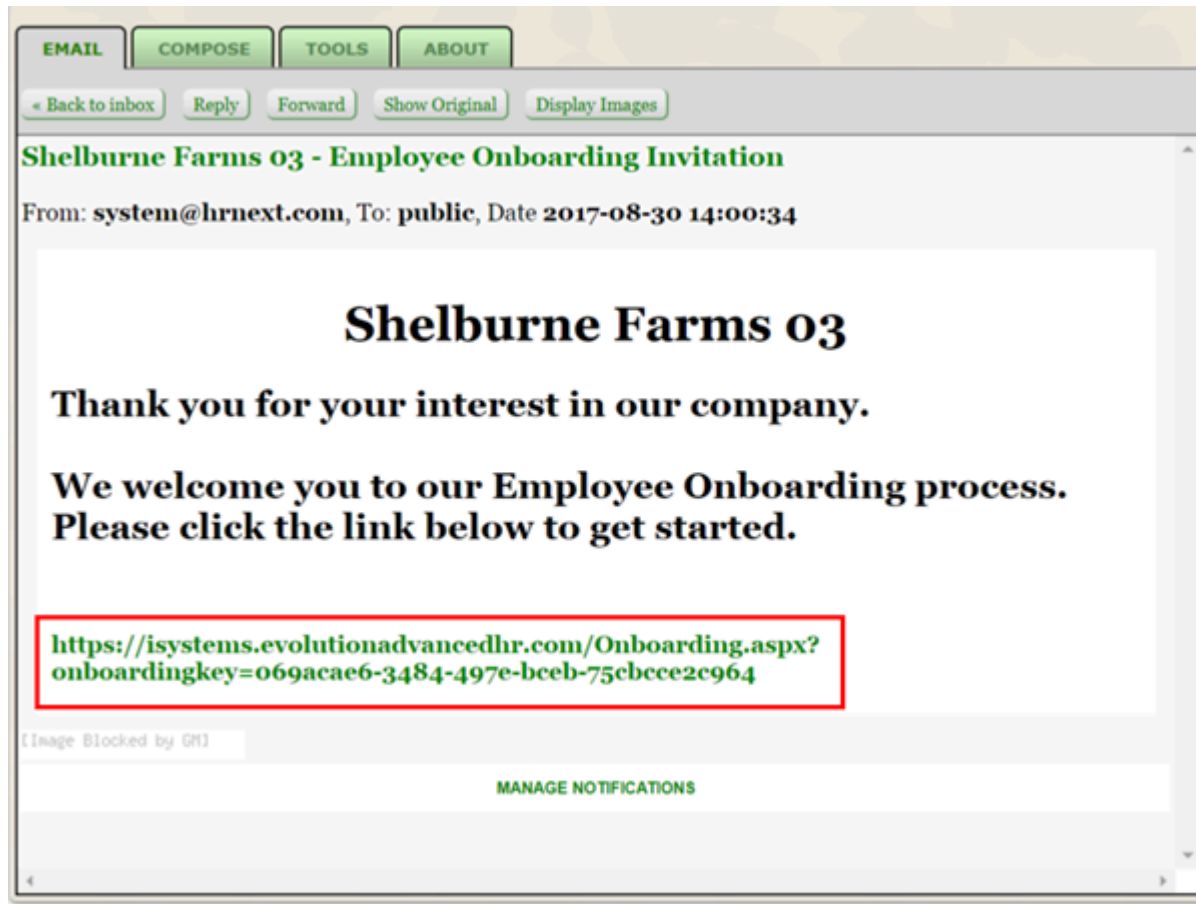
- The **user**
- The **employee**
- The **company**

**Note:** Remember that usernames (emails) must be unique to the system. Advanced HR 2.0 will verify that the new

username is not already being used. **Quick User Add** is meant as a quick way to add a user to the system with the most important fields. If other details about the user are to be entered, go to the **Company - User List** screen after completion to review or add other details.

## Self Service Onboarding

When the blue **Submit Onboarding Request** button is clicked, the new hire gets a welcome email instructing them how to access the system and complete their application.



When the email link is selected, the new is taken to the **Self Service Onboarding Wizard**. The new hire will be guided through this Wizard, eventually Submitting their information for approval.

## Onboarding

### VERIFICATION - Enter Onboarding Key

You should have received an email with a unique link to your onboarding experience. If you clicked that link from the email or copy/pasted the link, this key should be pre-filled in for you. Please keep this link and/or key handy until you fully complete your onboarding experience. We will save information along the way, so if you need to leave and return later, you can start from where you left off by using this same key.

069acae6-3484-497e-bceb-75cbce2c964

Begin Onboarding

The final step in Self Service Onboarding, is to approve the new hire. As a Base Manager or Base Admin User, go to the **Onboarding Dashboard** to review, and then **Approve**, the new hire's information.

OnBoarding Prep						
filter grid...						
Actions	Company	Name/ID	EmailAddress	Status Eastern	Hire Date	Tax Form
	Shelburne Farms 03	Public, John - (11)	public@sharklasers.com	Prepped - 08/30/2017 09:57 AM 1	08/30/2017	W2
	Shelburne Farms 03	Samson, John - (10)	johnson@sharklasers.com	Approved - 08/25/2017 03:52 PM 5	08/25/2017	W2
	Seuss Corporation	Salafia, Sonny - (206)	Sonny@sharklasers.com	Requires Approval - 08/23/2017 05:02 PM 4 Approve  Reset Status	08/23/2017	W2
	Seuss Corporation	Hammonds, Marlene - (205)	marlenehammonds@sharklasers.com	Requires Approval - 08/23/2017 11:32 AM 4 Approve  Reset Status	08/23/2017	W2