NEOGOV

Insight Training Guide

admin

THE SOUTH CAROLINA
DEPARTMENT of ADMINISTRATION

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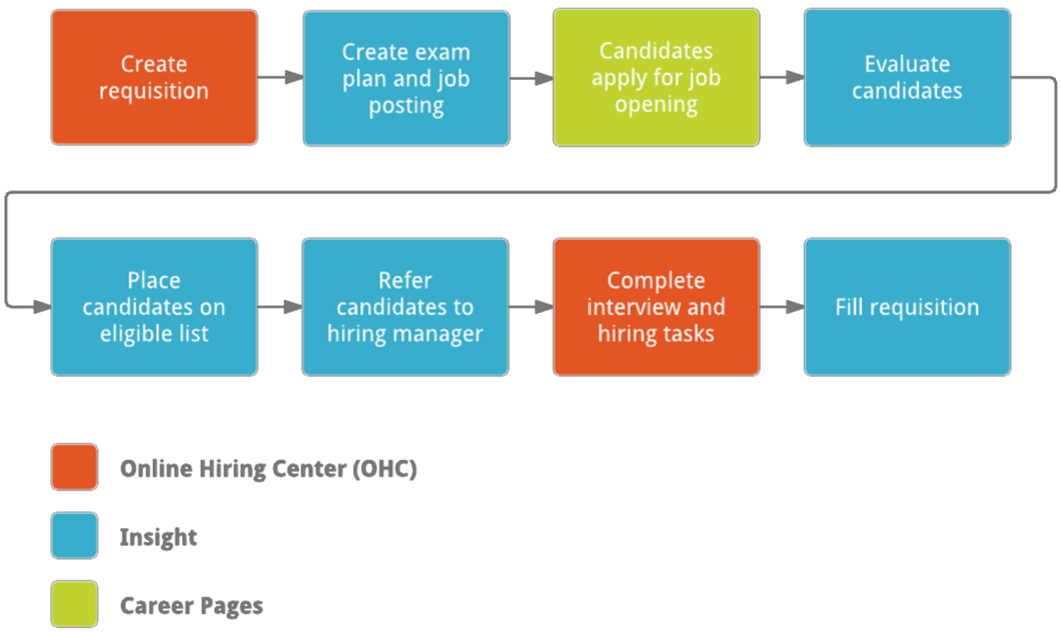
Training Module Guide

Introduction

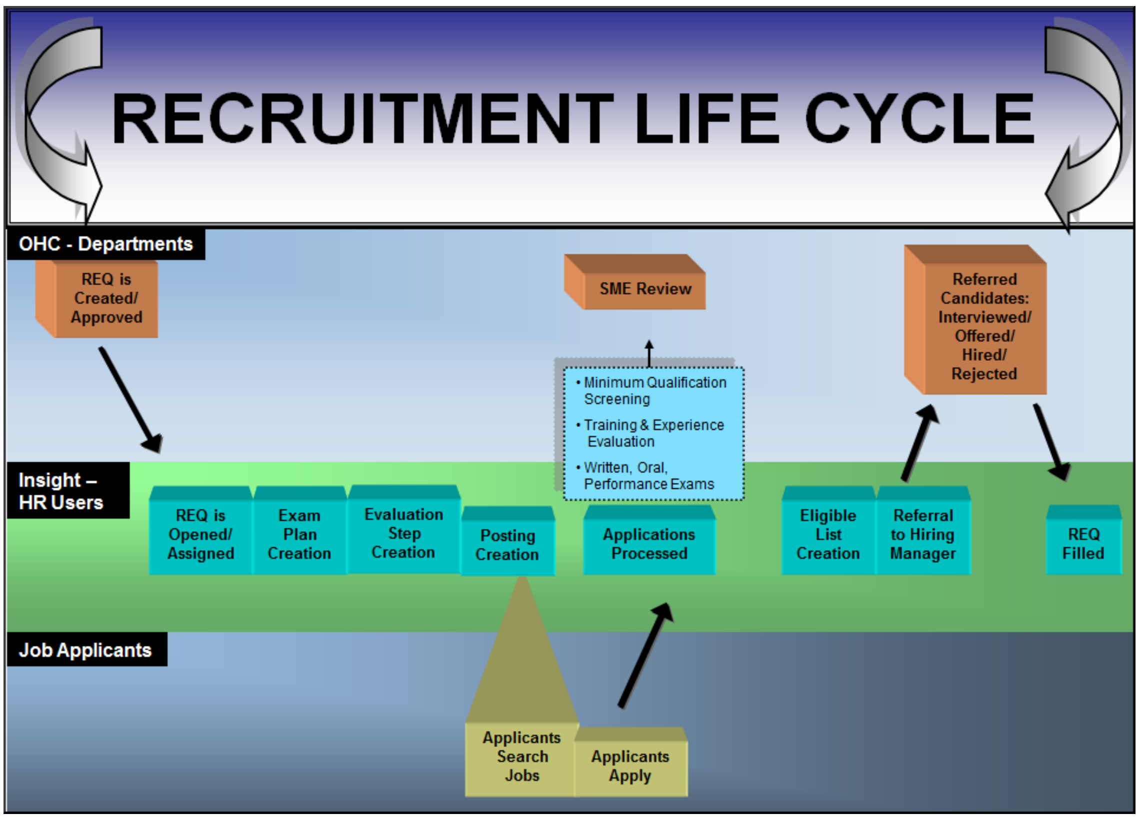
Welcome to new user training for Insight! This guide walks you through the training modules, step by step, from opening a requisition to hiring the ideal candidate. The chart below depicts the hiring process within the Neogov/Insight system.



Recruitment Life Cycle Overview

Insight is designed to automate the entire hiring process. It brings together the hiring departments through the Online Hiring Center (OHC), the Human Resources office through Insight and job applicants by career pages.

Some agencies' human resources offices handle the entire recruitment process, while others grant their hiring managers access to the online hiring center. Please consult with your agency's human resources office to determine who is responsible for which steps in the recruitment process.



Recruitment Life Cycle Role and Responsibility Chart

Step in Recruitment Cycle	Role	System Access
Requisitions – Open New	Liaison or Originator	Online Hiring Center – Department Users
Requisitions – Approvals	Approver	Online Hiring Center – Department Users
Requisitions **Status** Open / Assign **Analyst**	HR User	Insight – Human Resources
Exam Plan Creation	HR User	Insight – Human Resources
Evaluation Step Creation	HR User	Insight – Human Resources
Job Posting Creation	HR User	Insight – Human Resources
Applicant – Search for Jobs	Applicant	Insight – Human Resources
Applicant – Apply	Applicant	Specific Agency Web page
Application Process Minimum Qualification Screening Training and Experience Evaluation Written, Oral, Performance Exam step types	HR User	Insight – Human Resources
SME Review – any step	SME	Online Hiring Center – Department Users
Applicants – Add to Eligible List	HR User	Insight – Human Resources
Applicants – Refer to Hiring Manager	HR User	Insight – Human Resources
Referred Candidates: Schedule Interview / Make Offer / Hire / Reject	Hiring Manager / Liaison	Online Hiring Center – Department Users
Requisitions – Filled	HR User	Insight – Human Resources
Job Posting – Archived	HR User	Insight – Human Resources
Exam Plan – Archived	HR User	Insight – Human Resources
Referred List – Archived	HR User	Insight – Human Resources

Universal Login

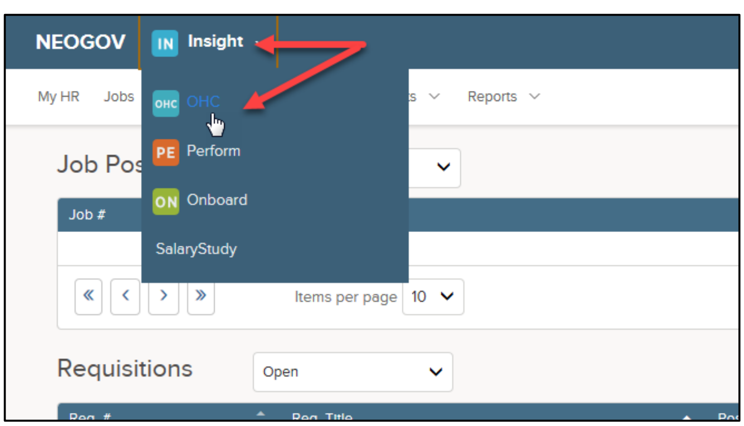
Users with multiple responsibilities that include **Insight** (**IN**) and **Online Hiring Center** (**OHC**) may be configured with both login permissions. You may seamlessly switch between **Insight** (**IN**) and the **Online Hiring Center** (**OHC**).

Access: https://secure.neogov.com

1. Enter with your **Username** and **Password.** If you have an Insight user account, you will be directly logged in to Insight. If you only have an OHC user account, you will be directly logged in to the OHC.

2. Click **Log In.**

3. Look for the NEOGOV logo in the upper left corner of the **My HR** page. Navigate to the OHC to begin the process of creating a requisition for the vacancy.



Module 1: Create a Requisition

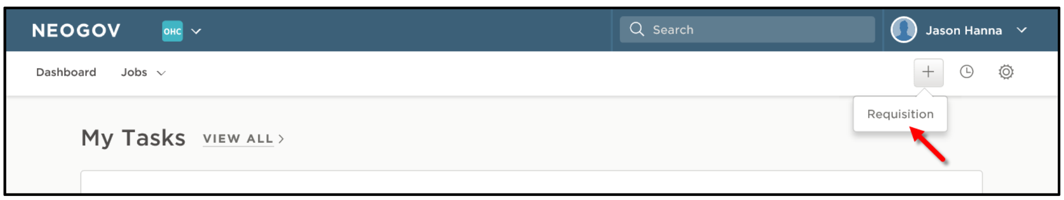
When a hiring department has a position vacancy, they will create a requisition from the OHC. An OHC user assigned the role of Originator or HR Liaison will have the ability to create requisitions for their assigned department(s).

Note: Insight users given permission to add requisitions may do so on behalf of the hiring department. From **Insight**, select the **Jobs** menu, then click on **Requisitions** and click the **Add New button [+]**.

Below are two navigation paths to start the process of creating a requisition. Use whichever path you prefer.

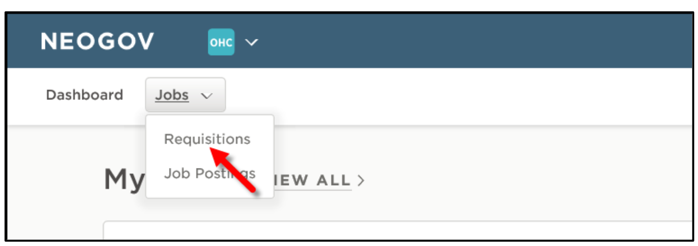
<u>Navigation Path 1</u>

In the OHC, on the **Add New menu [+]**, click **Requisition**. This can be done from any page.

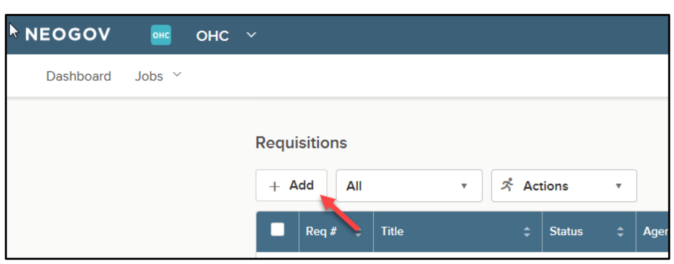


<u>Navigation Path 2</u>

In the OHC, on the **Jobs** menu, click **Requisitions**.

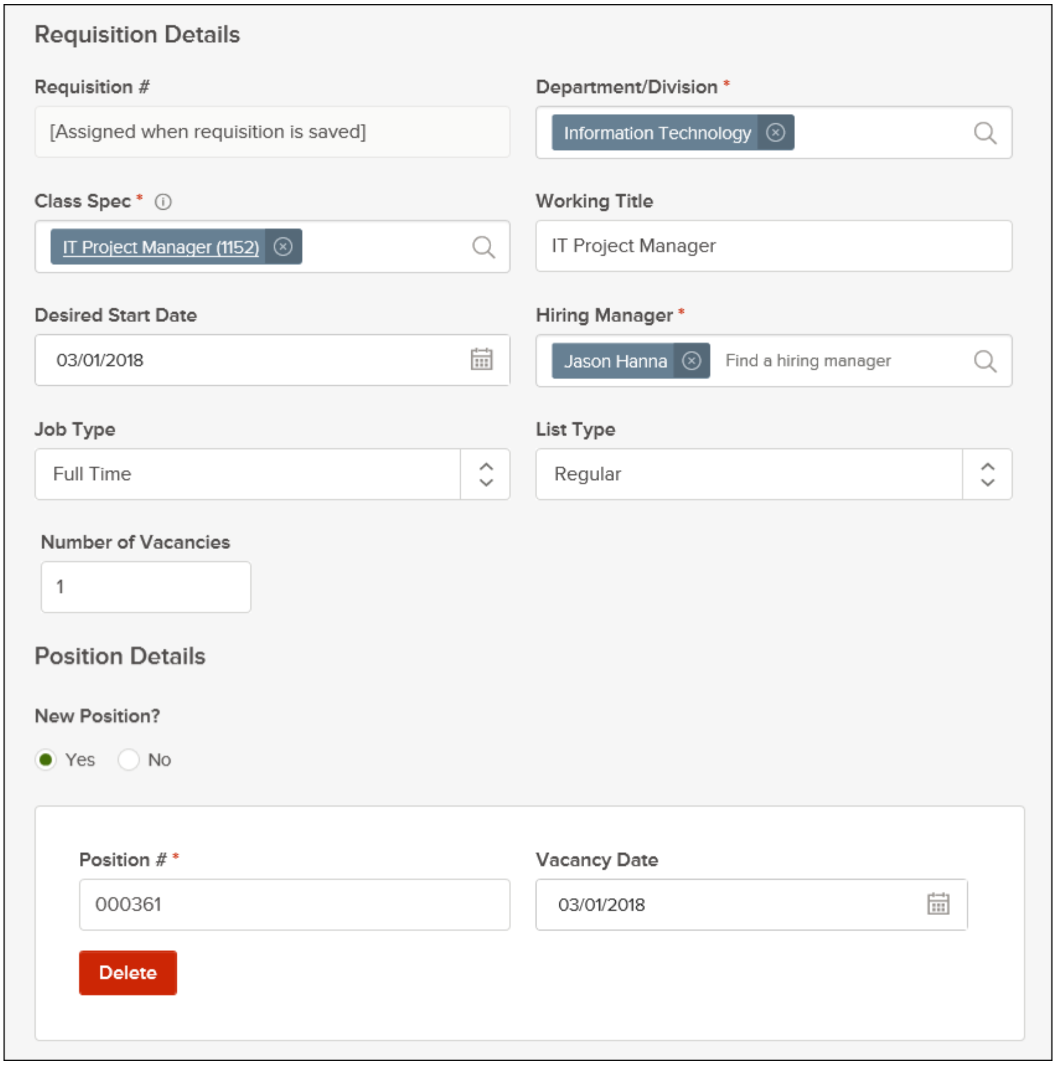


Then click **Add**.



Steps to Create a Requisition

1. The first of three requisition form pages will display.

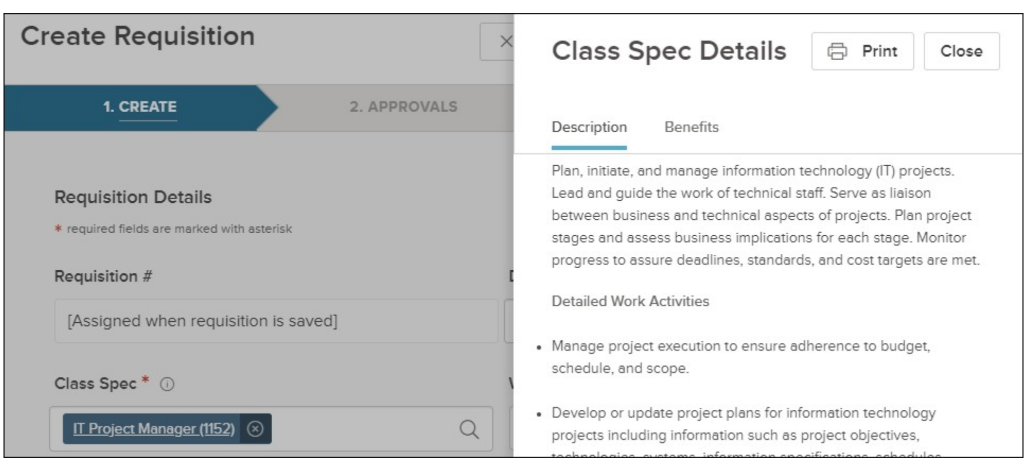


2. Complete the requisition form using the table below.

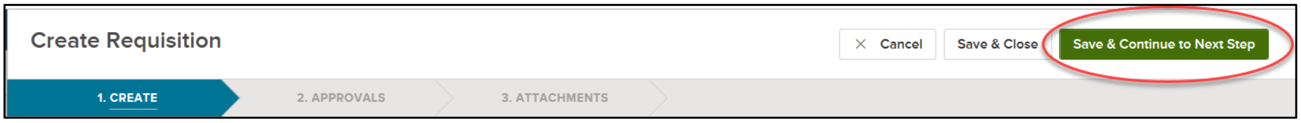
* Required

Field	What to Enter
* Requisition #	Since auto-numbering is enabled for this field, nothing is required; a number will be automatically assigned once you create the requisition.
* Agency/Division	Select the agency/division.
* Class Spec	Select the class specification.
Working Title	Enter the working title for this job. This can be the same name as the class title.
Desired Start Date	Enter the desired start date of the hired candidate, if available.
* Hiring Manager	Select your name and any others who will be using the system to view applications, send notices to candidates, view or take action on referred lists as a hiring manager.
Job Type	Select the proper job type.
List Type	Select Regular.
Number of Vacancies	Enter the number of vacancies.
New Position?	If this is a new position, select “Yes.” If this is an existing position (i.e., replacement of staff), select “No.”
Position Detail	Click **Add Position Detail** and enter information about the position including the position number, vacancy date, and if applicable, the first and last names of the incumbent replaced. Repeat this step if you have more than one vacancy.
Comment	Enter any additional information about the job in this field.

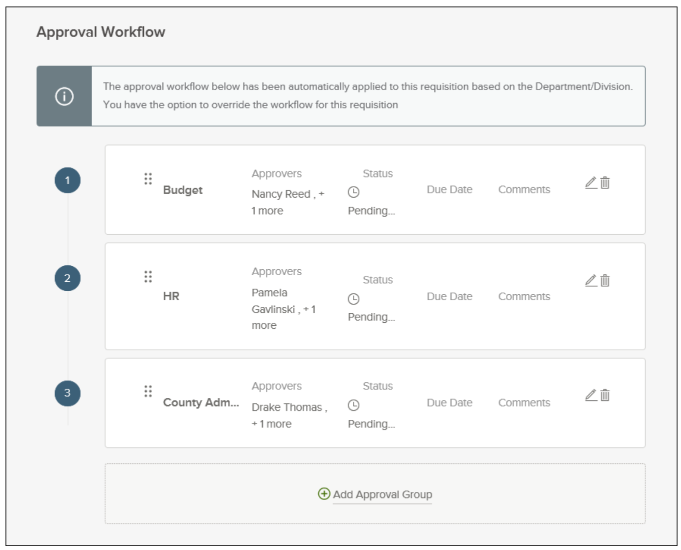
Note: To check the **ClassSpec** field, click the selected job title to have a closer look. If you’d prefer printing the class spec, simply click **Print**. After your review, click **Close**.

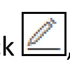


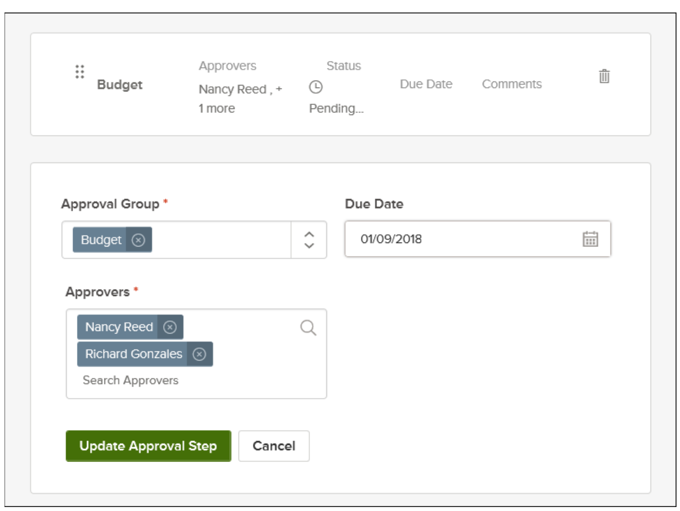
3. Once you've completed and reviewed the Requisition form, click the **Save & Continue to Next Step** button in the top right corner of the screen. The Approval Workflow page will display.



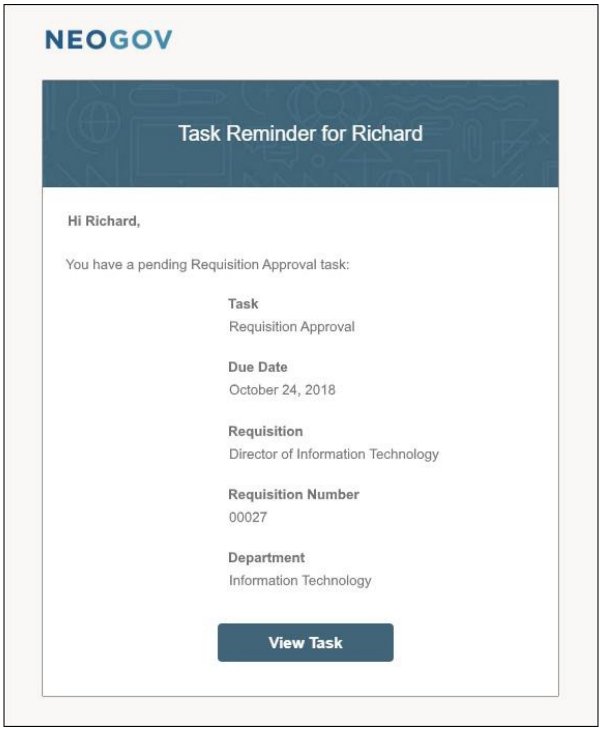
4. If you have an approval workflow template, it will display on the second requisition form page. In the event of a special circumstance that requires changes, you have the option to override the workflow. Any changes made will only be applied to this requisition, not the saved approval workflow template.



5. To keep the assigned approver(s) reminded about their approval task with a due date, click , enter a due date, and then click **Update Approval Step**.

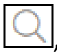


Note: Repeat these steps for all remaining approval steps that require due dates. The assigned approver(s) will receive a reminder email from info@neogov.com, with the subject line, NEOGOV OHC Task Reminder, on the due date and each day the approval task is past due, until the task is completed. In the contents of the reminder email will be a **View Task** button, guiding the approver(s) to the task requiring their attention.

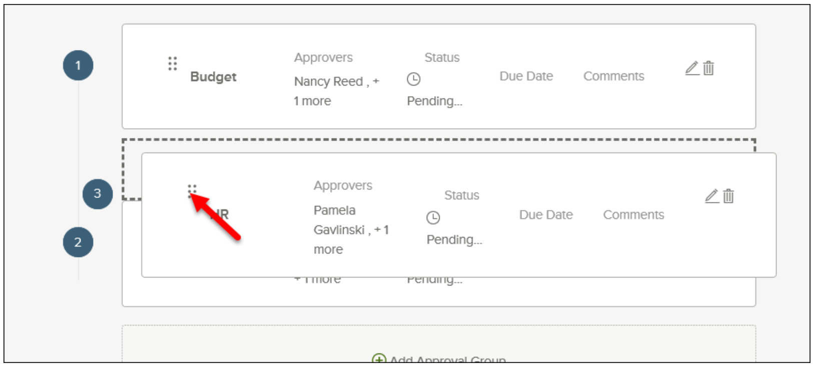


6. If a template for your agency/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) Create an approval workflow or (2) Skip the approval workflow and click **Save & Continue to Next Step**. To create an approval workflow, follow the steps listed in the **Create an Approval Workflow** section below. Otherwise, click **Save & Continue to Next Step.**

Create an Approval Workflow

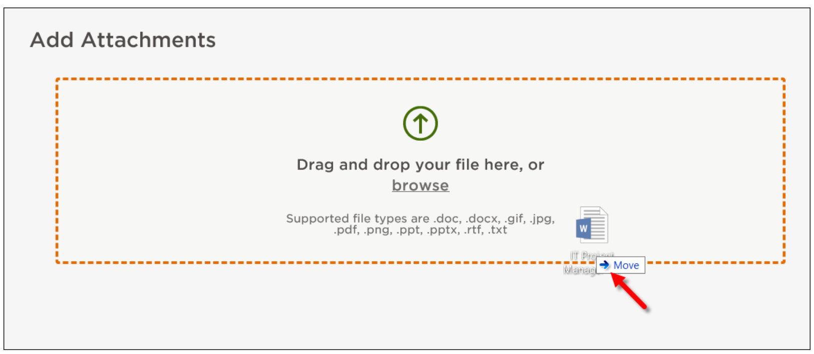
a. Click the **+Add Approval Group** link.
b. On the **Approval Group** pulldown, click the applicable approval group.
c. Enter a Due Date in the **Due Date** field (optional).
d. From the **Approvers** field, click , select the applicable approver(s).
e. Click **Add Approval Step**.
f. Click **+Add Approval Group and** repeat these steps for the remaining approval steps.

tip If your approval steps are not in the proper order, you can easily correct the order by dragging and dropping them in the desired order.



7. Click **Save & Continue to Next Step** when all changes have been made.

8. Drag any file attachments to the third requisition form page and click **Save & Submit**.

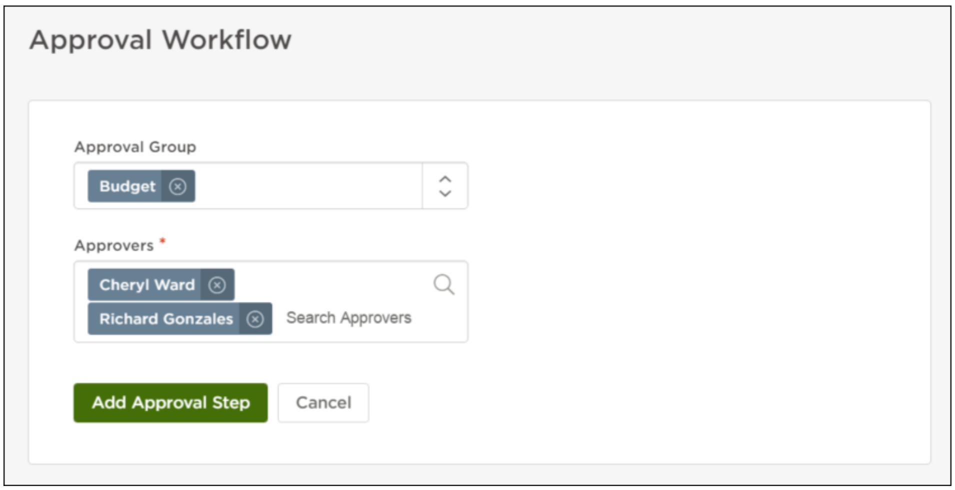


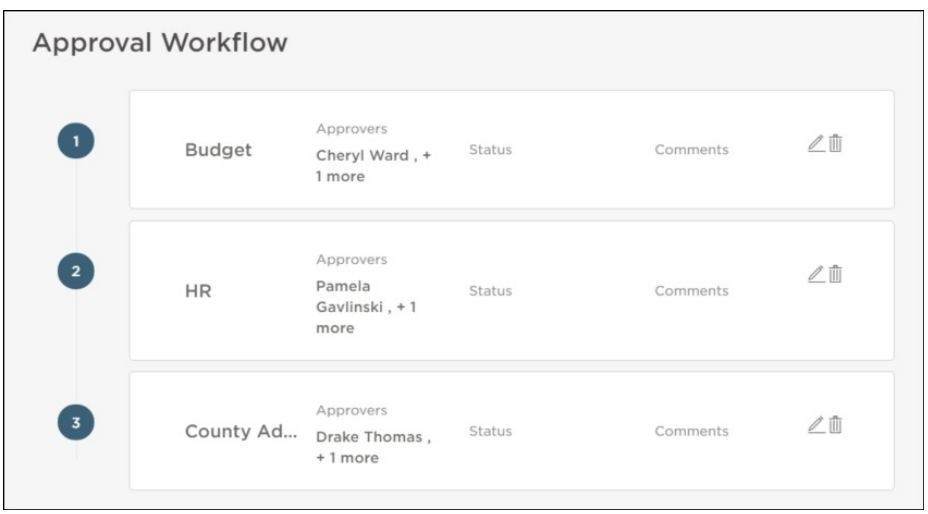
tip If you're not quite ready to submit the requisition, click **Save & Close**. The requisition will display on your dashboard page in the My Requisitions section as a draft.

Requisition Approval Workflow Example

You may need to route the requisition through a series of approval groups, depending upon your agency's use of the system. This can be achieved by defining an approval workflow.

In the example illustrated below, the defined approval workflow requires the requisition to go through a total of three approval groups. Once the requisition creator submits the record, it will go to the first approval group. In this example, both Cheryl Ward and Richard Gonzales will be notified, via email, that a requisition requires their action. Approval is on a first come, first approve basis. Either Cheryl or Richard will need to approve the requisition to move it on to the next approval group.



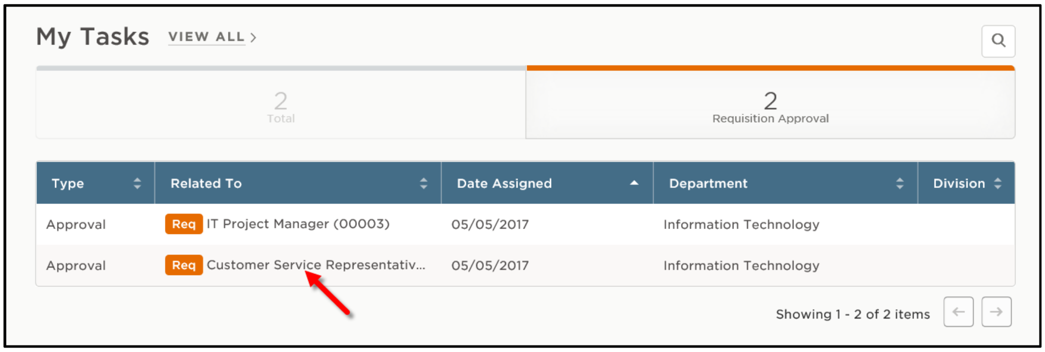


The system is configured to allow up to 10 levels.

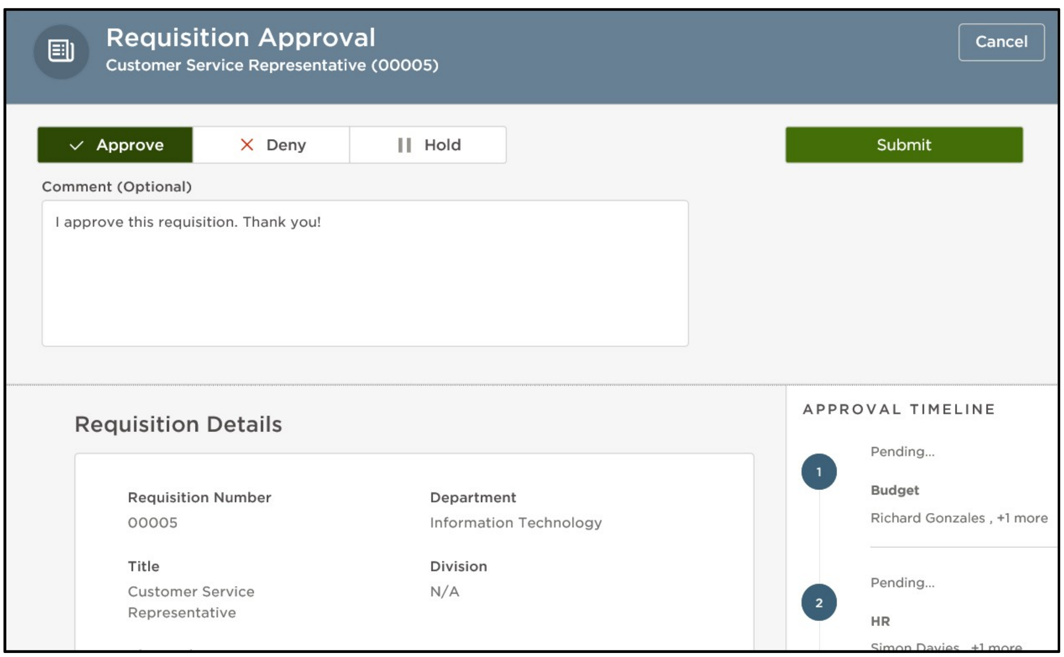
Steps to Approve a Requisition

1. Click **Dashboard** from the upper left corner.

2. From the **My Tasks** section, click the requisition pending your review.



3. Click **Approve**, type any comments and click **Submit**.



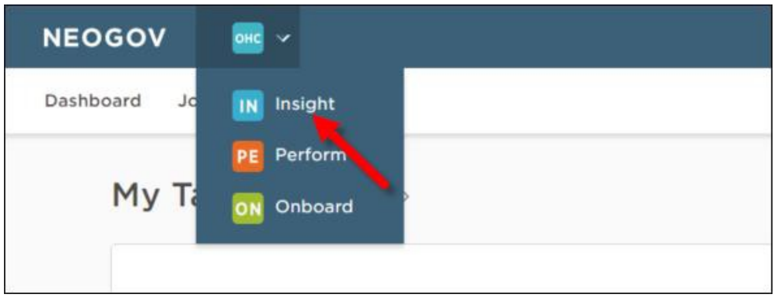
Note: Approvers have the option of denying or placing a requisition on hold. If denied, the requisition record can be sent back to any one of the previous approval groups or all the way back to the creator. Depending on the circumstances of the denial (e.g., additional justification), the requisition approval process can be restarted.

If a requisition requires canceling, it must be canceled by the original creator or someone with the role of HR Liaison. Additionally, if a requisition has been approved, it can be canceled by an HR staff member with Insight access.

Module 2: Authorize a Requisition and Create an Exam Plan

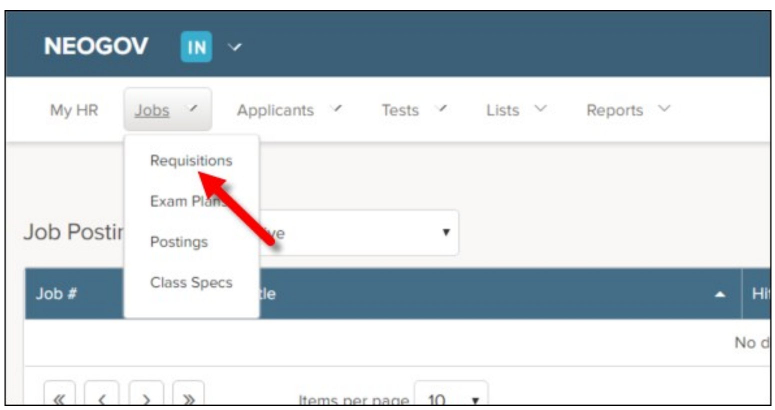
Once the requisition has been created and approved (if required) in the OHC, the requisition is routed to the HR side of the system, Insight.

To switch to the Insight user role and assume the role of HR, click **Insight** on the **NEOGOV Product menu**.

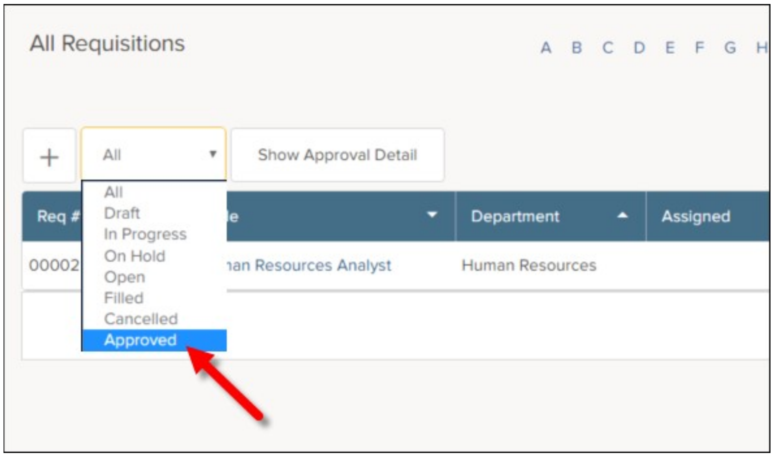


Steps to Authorize a Requisition

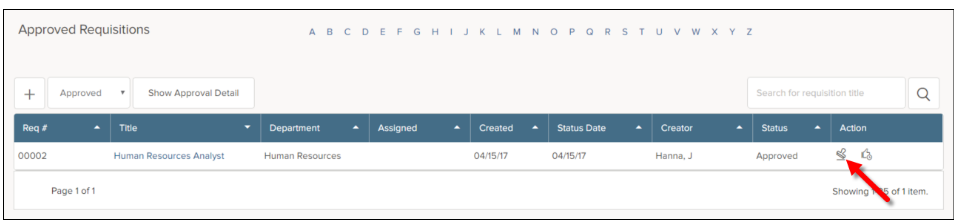
1. Insight users are configured to receive requisition notification emails about new requisitions. A notification serves as a prompt to view a new requisition. To access the requisition, from **Insight**, on the **Jobs** menu, click **Requisitions**.



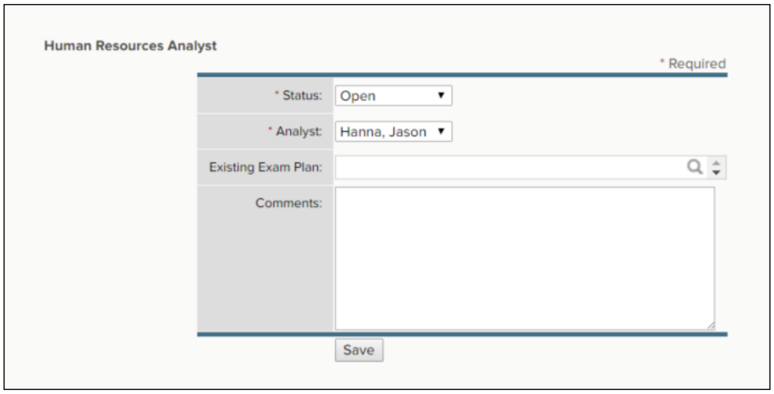
2. The default view displays all requisitions. This listing will grow over time, so using the Status pulldown will help quickly find requisitions. New requisitions that have been routed to HR to start the recruitment process will have the **Status** field set to **Approved**. On the **Status** pulldown, click **Approved**.



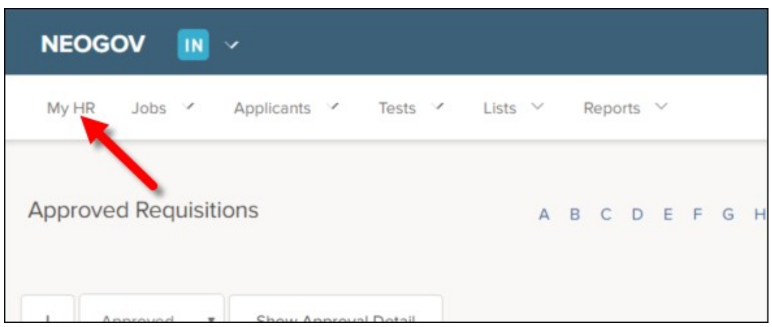
3. Locate your recently-created requisition. From the **Action** column, click the **Authorize** icon (). It looks like a rubber stamp.



4. On the **Status** pulldown, change the selection from Approved to **Open**. On the **Analyst** pulldown, **select your name**. Leave the **Existing Exam Plan** field blank as you will be creating a new exam plan later. This field is only used if you're retrofitting a requisition to a previously-created exam plan, or if a requisition is created for the same job where a current list of eligible candidates can be referred to the hiring department without the need of starting a new recruitment.



5. Click **Save** and then click **My HR** to return to your Insight dashboard to begin the process of creating the exam plan.



Note: The requisition displays from your **My HR** page, **Requisitions** section, as you are now the assigned analyst. From the **Exam** column, a **Create Exam** link is available. Once the exam plan is created, this will be replaced with a number for quick access to the exam plan.

What is an exam plan?

An exam plan is a central hub for many recruitment processing activities. From the exam plan, you can track recruitment activities and view associated records. It may help to think of the exam plan as a recruitment folder where your recruitment work is stored. See the sections table on the following page for more details.

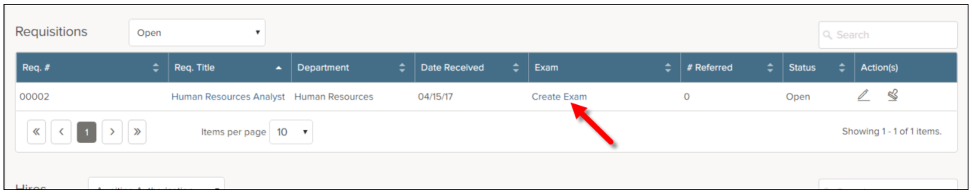
Sections of the Exam Plan

Section	Description
Job Posting	Add a job posting from this section. Once the job posting has been added, you can view, edit, archive/unarchive and view the audit trail.
Recruiting Plan	Track advertising expenditures from this section. Once an advertising item has been added, you can edit, delete and view the audit trail. Your Insight Administrator will set up the most commonly used advertising methods, e.g., Newspaper ad, Radio ad, CareerBuilder.
Evaluation Steps	Add one or multiple selection hurdles for your candidates from this section. Once an evaluation step has been added, you can edit, delete and view the audit trail. Once candidates have applied, you can view submitted applications, print applications and view candidate results and flow reports. This is where you'll spend much of your application screening/scoring time.
Advanced Filters	Add evaluation and/or eligible list filters to find specific groups of candidates from this section. Filters can be based on various data points including master profile, standard application, agency-wide and job-specific supplemental questions and evaluation step results. Once a filter has been added, you can view, edit, delete and share.
Eligible Lists	Add subsequent eligible lists from this section. Upon creating the exam plan, Insight automatically creates an eligible list for you. This eligible list, named Default List, has a list type set to Regular. You can edit and view candidates and view audit trail for the default and/or subsequent eligible lists. Candidates must go through all evaluation steps prior to being placed on the regular eligible list.
Requisitions	View the associated requisition(s) from this section. Other actions include: add, edit, authorize, disassociate and view a resulting referred list.
Tasks	Add other Insight users' recruitment tasks from this section. Once a task has been added, you can edit and delete. The task system will send automated email notifications to assignees regarding assignments, due dates and status changes.
Notes	Add recruitment notes from this section. Once a note has been added, you can edit, delete and view the audit trail.
Files	Add (upload) files applicable to the recruitment from this section. Once a file has been uploaded, it can be downloaded or deleted.

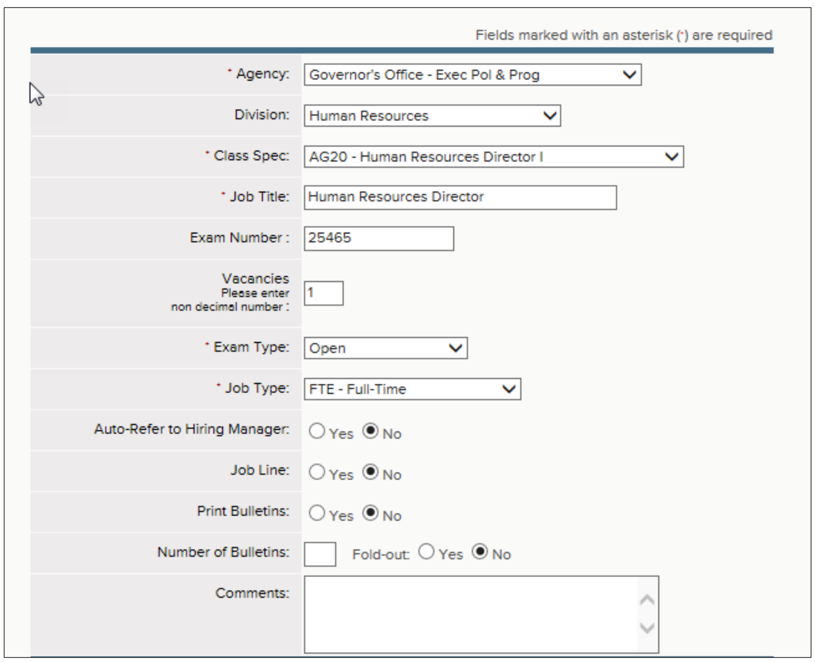
Steps to Create an Exam Plan

To create the exam plan, complete the following steps:

1. **My HR** page, **Requisitions** section, under the Exam column, click **Create Exam**.



2. The Exam Plan form will display.



3. Complete the form using the table below.

* Required

Field	What to Enter
* Agency	Pre-populates with the Agency specified in the requisition.
* Division	Pre-populates with the Division specified in the requisition.
* Class Spec	Pre-populates with the class specification specified in the requisition.
* Job Title	Pre-populates with the working job title specified in the requisition.
Exam Number	Pre-populates with the same number assigned to the requisition.
Vacancies	Pre-populates with the same number of vacancies designated in the requisition.
* Exam Type	Select "Open" from the pulldown.
* Job Type	Select the job type from the pulldown.
Auto-Refer to Hiring Manager	Leave the default value of "No" if you will be evaluating candidates using a series of evaluation steps or manually reviewing the candidates' applications before referring them to the hiring manager. ***Note***: If set to "Yes," candidates will be immediately referred to the hiring manager(s) designated on the associated requisition.
Job Line	This field is for tracking purposes only. If your organization uses a job line (i.e., a telephone audio recording of open jobs), select whether or not this job is on the job line.
Print Bulletins	This field is for tracking purposes only. Select whether or not you're printing job bulletins.
Number of Bulletins	This field is for tracking purposes only. If you're printing job bulletins, you can track the number and whether or not they are fold-out.
Comments	Enter any additional information about the exam plan in this field.

4. Click **Save**.

Create an Evaluation Step (Optional)

With the exam plan now in place, the system is configured to automatically create the first evaluation step, Step 1, Application Received. You can create additional evaluation steps. Think of evaluation steps as selection hurdles. Failing candidates will remain at the evaluation step; all passing candidates will advance to the subsequent step.

There are a variety of evaluation step types to choose including: supplemental questionnaire, training and experience, rating matrix, written exam, performance exam. If multiple evaluation steps are created, the applicant can see the current status message in the applicant's self-service portal.

To accurately capture the applicants meeting minimum training and experience requirements, agencies will need to consistently structure job postings in one of the following ways:

1. Add a "Supplemental Questionnaire" step type titled "Minimum Qualifications" in your exam plan and "Fail" those individuals who do not meet minimum qualifications;

2. Add a "Training and Experience" step type titled "Minimum Qualifications" in your exam plan and "Fail" those individuals who do not meet minimum qualifications; or

3. If the candidates on the Eligible List are all those who meet the minimum training and experience requirements for the job, agencies are not required to do either of the above steps, because the system will be able to identify the total number of candidates placed on Eligible Lists over a given period of time.

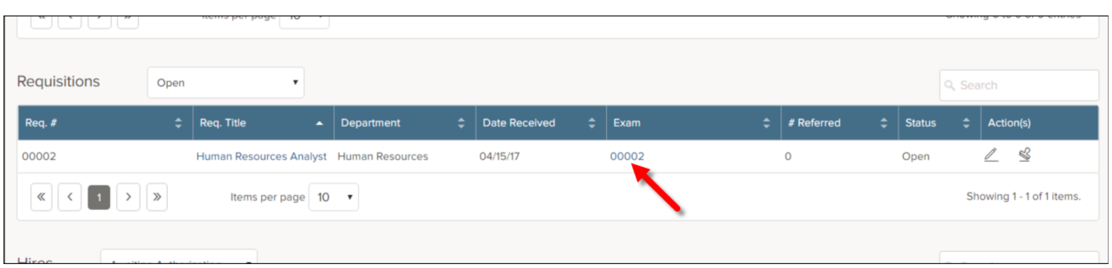
If agencies set up two "training and experience" step types, the system will be unable to differentiate which one is to be used for EEO reporting purposes. Therefore, to avoid duplication, agencies must choose either the "supplemental questionnaire" or the "training and experience" step type to capture those applicants who meet the minimum training and experience requirements.

<u>**Steps to Create an Evaluation Step**</u>

1. Access the exam plan by either:

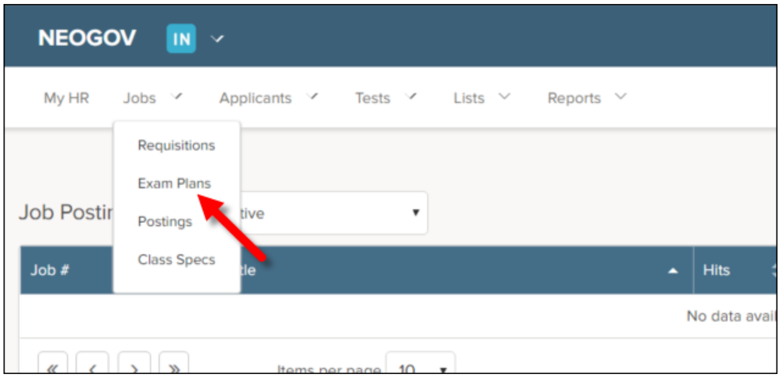
   <u>**Navigation Path 1**</u>

   From **My HR** page, in the **Requisitions** section, click the **exam number**.

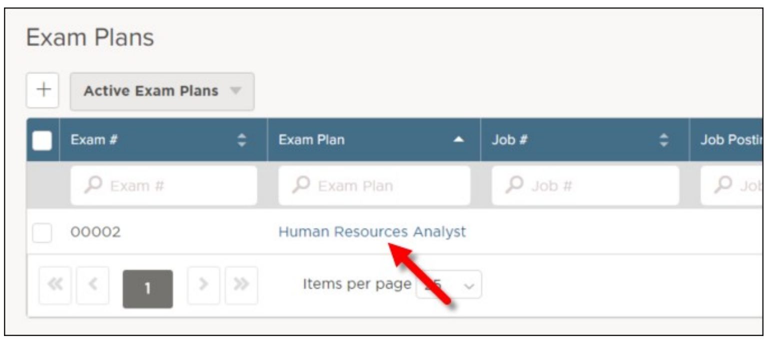


Navigation Path 2

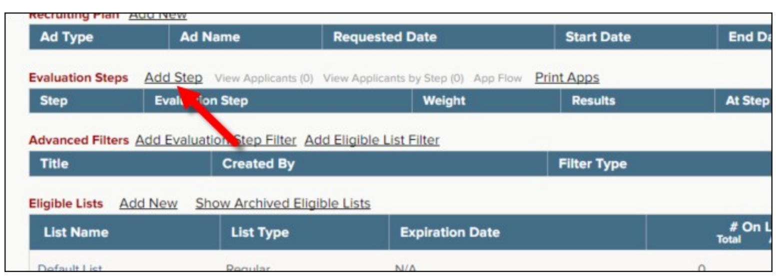
a. On the **Jobs** menu, click **Exam Plans**.



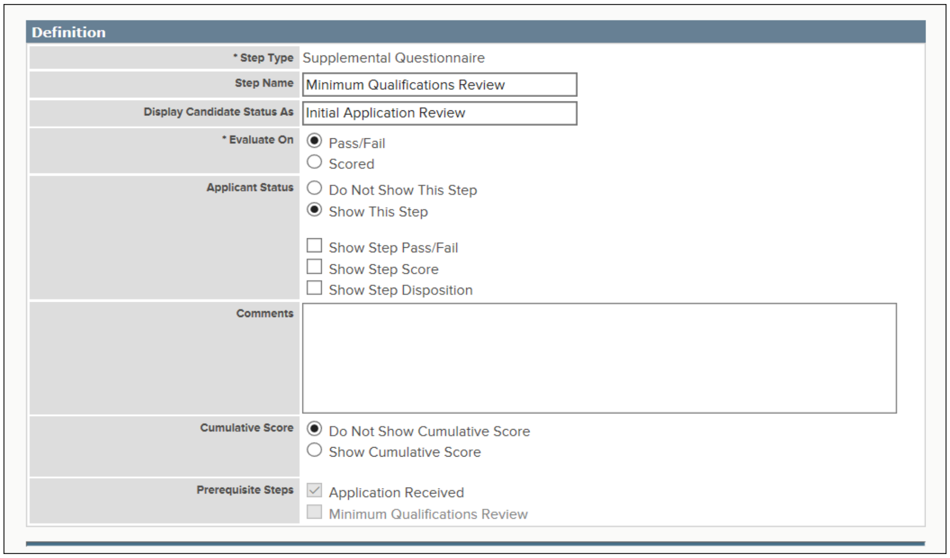
b. From the **Exam Plan** column, click **the job title.**



2. From the **Evaluation Steps** section, click **Add Step**.



3. The evaluation step form will display.



4. Complete the form using the table below.

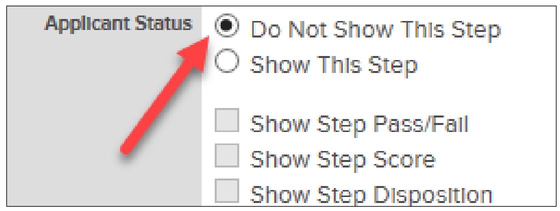
* Required

Field	What to Enter
* Step Type	Select the type from the dropdown menu.
Step Name	Enter a name for the evaluation step.
Display Candidate Status As	This message will display to candidates who sign back into the applicant portal to see their current application status. This status is to let applicants know where they are in the process (not their performance, as this same message is displayed to every applicant placed in the step). Leave the field blank to automatically display Application Received in the applicant's self-service portal view.
* Evaluate On	Select **Pass/Fail** if this will be a pass/fail step or **Scored** if this will be a scored step.
Applicant Status	Indicate whether or not the **Step Name** will be shown. If so, indicate which information should be revealed to the applicant. Remember that the **Display Candidate Status As** status will always display to the candidate whether or not the step is shown under **Applicant Status.**
Comments	Enter any additional information about the evaluation step in this field.
Cumulative Score	Select **Do Not Show Cumulative Score** if you do not want to show the cumulative score or **Show Cumulative Score** if you want to show the cumulative score. If you select a pass/fail step, the cumulative score will not be applicable.
Prerequisite Steps	Indicate if there are any previous steps are prerequisites to this step.

5. Once you've finished, click **Save**.

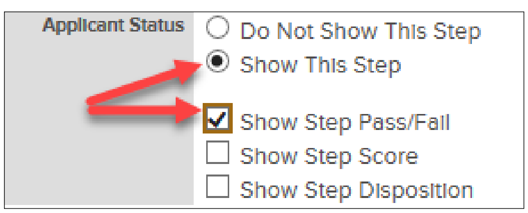
tip For more information on the options available when setting up an evaluation step, see below:

The view option always defaults to **Do Not Show This Step** on each step, forcing the Insight User to take action to **show** the status to the applicant.

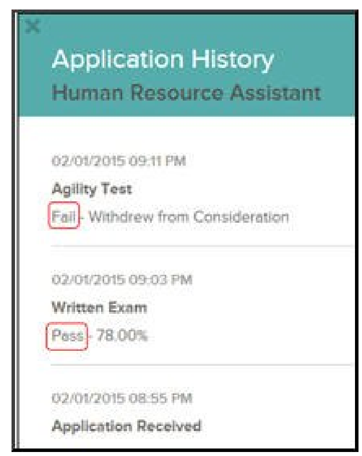


Selecting **Show This Step** adds this evaluation step to the **Applicant Status** view within the applicant's self-service portal.

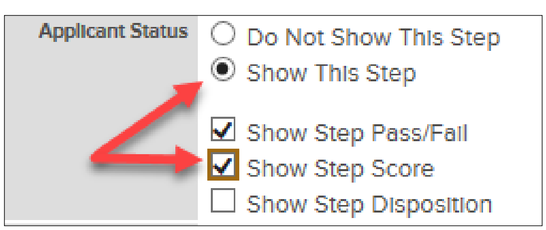
Selecting **Show Step Pass/Fail**:



...adds Pass/Fail content to the applicant status window for the evaluation step.

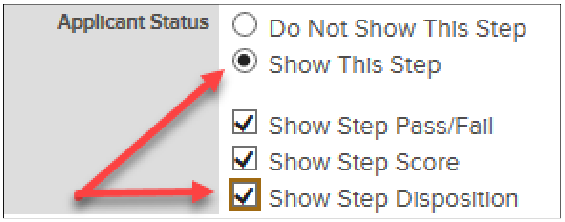


Selecting **Show Step Score**:

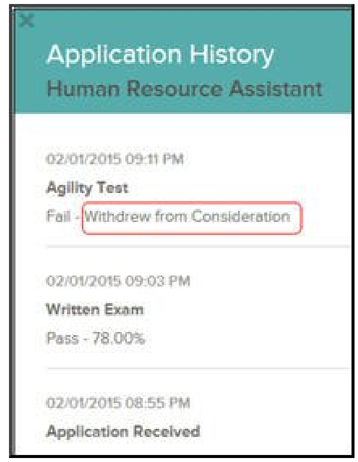


...adds the applicant's score percentage to the applicant status window for the evaluation step.

Selecting **Show Step Disposition**:



…adds rejected applicant's disposition (reject reason) to the applicant status window for the evaluation step.



Module 3: Create a Job Posting

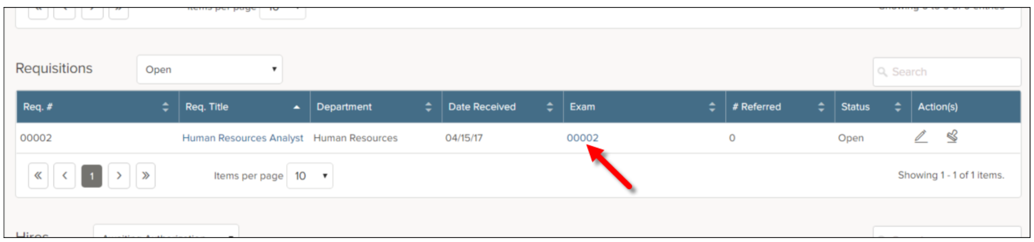
In the previous training module, you created an evaluation step. Now the exam plan is prepared to accept applications. For this training module, you will create a job posting to announce the job opening on the web.

Steps to Create a Job Posting

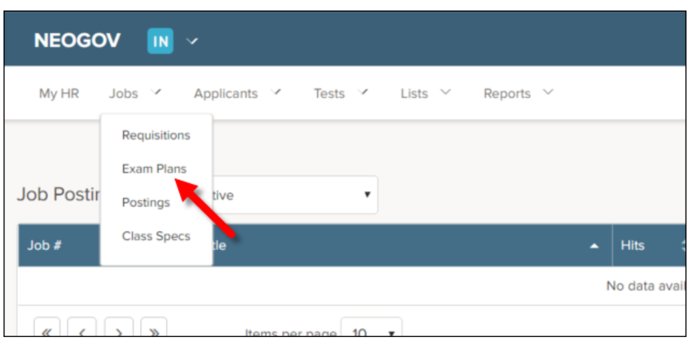
1. If you're not already viewing your exam plan, return to the exam plan.

<u>**Navigation Path 1**</u>

a. From **My HR** page, in the **Requisitions** section, click the **exam number**.

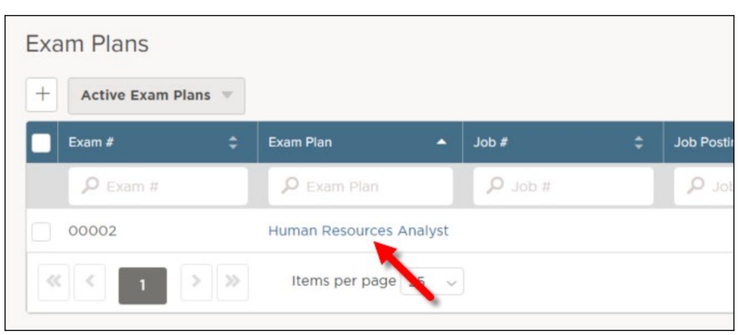


b. Onthe **Jobs** menu, click **Exam Plans**.

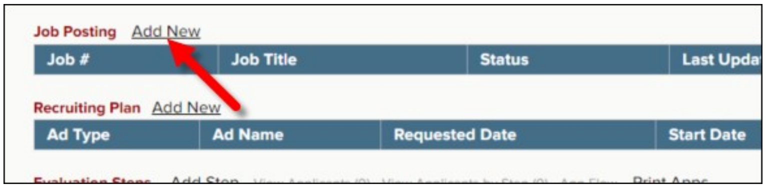


<u>**Navigation Path 2**</u>

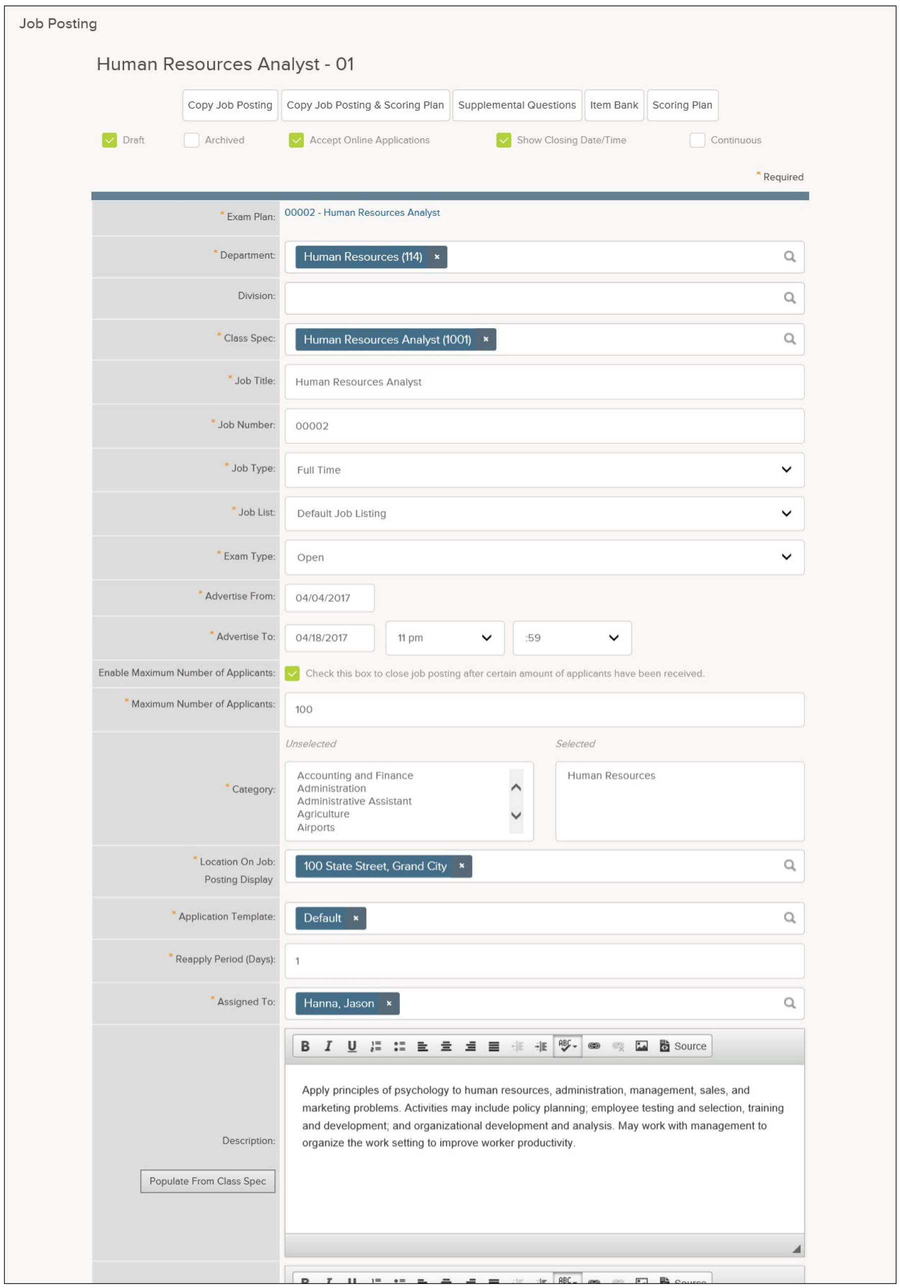
a. From the **Exam Plan** column, click the **job title**.



2. From the **Job Posting** section, click **Add New**.



3. The job posting form will display.



4. Complete the form using the table below.

* Required

Job Posting Checkbox Fields

Field	What to Enter
Draft	Select Draft to keep the job posting in a "work in progress" state. It is a best practice to select this field until you've thoroughly reviewed the job posting and are ready to post the job online. This prevents posting online with errors or without job-specific supplemental questions.
Archived	Select Archived at the end of the recruitment process. This should be done after you've hired the ideal candidate and you're filing away records. Along with the job posting, you will likely archive the exam plan, eligible list and referred list.
Accept Online Applications	Select Accept Online Applications to allow online candidates to submit their applications for employment.
Show Closing Date/Time	Select Show Closing Date/Time to display the closing date and time on the job posting. If the job is open until filled, then you may opt to deselect. This will remove the closing date and time from the job posting.
Continuous	Select Continuous to display the word "Continuous" for the job posting closing date and time.

* Required

Job Posting Fields

Field	What to Enter
* Exam Plan	Pre-populates with the correct associated exam plan since you're creating the job posting from the exam plan.
* Agency	Pre-populates with the same agency assigned to the requisition and resulting exam plan.
Division	Pre-populates with the division assigned to the requisition and resulting exam plan.
* Class Spec	Pre-populates with the class specification indicated in the requisition and resulting exam plan.
* Job Title	Pre-populates with the job title specified in the requisition and resulting exam plan.
* Job Number	Pre-populates with the number assigned to the requisition and resulting exam plan.
* Job Type	Pre-populates with the job type assigned to the exam plan.
* Job List	Leave the default value of "Default Job Listing."
* Exam Type	Pre-populates with the exam type assigned to the exam plan.
* Advertise From	Enter the date on which you will start to accept online applications for employment. At 12 midnight (in your time zone) on the opening day, the job will post and allow online applications.
* Advertise To	Enter the date and time that you will close the job and stop accepting online applications.

Enable Maximum Number of Applicants	Select to close the job posting once a specified maximum number of applications have been received, even if this occurs prior to the specific closing date. Closure will occur regardless of the Continuous field selection. If the Continuous field is not selected and the maximum is not reached, the job posting will close on the date in the Advertise To field.
* Maximum Number of Applicants *(Required if Enable Maximum Number of Applicants is selected.)*	This field will only display if "Enable Maximum Number of Applicants" is selected. Enter the maximum number of applications that will be accepted for the job posting. If the Continuous field is not selected and the maximum is not reached, the job posting will close on the date in the Advertise To field. ***Note***: Due to a slight syncing delay between the online application process and Insight, a few accepted applications over the maximum is possible.
* Category	Select one or multiple job categories that classifies the position.
* Location On Job Posting Display	Click and select the location for this job opening. This will display on the printed job bulletin and the career page for the posting.
* Government Jobs Location	Defaults to SC - Columbia
* Search Locations	Allows the user to filter available vacancies by location using the Locations filter on the Career Page.
* Application Template	Click and select the correct application template.
* Reapply Period (Days)	Enter the number of days a candidate must wait to reapply for this job posting. If you do not want candidates to reapply for this job posting, set the number to equal the total number of days the job posting is open, or higher (e.g., if the job posting is open for 14 days, then enter 14). ***Note***: Setting the number to 0 is not recommended as this allows a candidate to reapply as many times as they'd prefer within the same day.
* Assigned To	Defaults to the current user. Click and select the applicable Insight user.
Job Responsibilities	Enter a description of the work performed by the person in the position. Click **Complete From Class Spec** to copy the verbiage over from the associated class specification. This is the one and only time to take advantage of the complete function; if you return after saving, the complete buttons will not be available.
Minimum and Additional Requirements	List any minimum and additional requirements for the position. Click **Complete From Class Spec** to copy the verbiage over from the associated class specification. This is the one and only time to take advantage of the complete function; if you return after saving the complete buttons will not be available.
Preferred Qualifications	List the preferred qualifications for the position, if any.
Additional Comments	List additional comments, if any.

If bilingual, which language is desired?	This field is for internal tracking purposes only. If bilingual is desired for the job, select the applicable language. If a language is selected, it will not display on the job posting.
* Agency Specific Application Procedures	Enter any specific requirements.
Residency Requirement	List any specifics related to the residence requirement, if applicable.
Residency Requirement (specifics)	List any specifics related to the residence requirement,
* Class Code	Enter the classification code of the vacancy.
Slot Number	Enter the position's slot number, if applicable.
* Position Number	Enter the position number.
* EEO Category	Select the EEO Category from the drop down.
EEO Subcategory	Enter the EEO Subcategory, if applicable.
* FLSA Category	Choose the appropriate FLSA category for the position, Exempt or Non-exempt.
* Normal Work Schedule	Select the work schedule. This will be displayed on the job bulletin and Career Page for the position.
* Pay Band	Select the pay band for the position. For unclassified or positions that do not fall within the classified pay band system, select Unclassified.
Hiring Range - Min.	Enter the agency's minimum hiring range.
Hiring Range - Max.	Enter the agency's maximum hiring range.
* Opening Date	Enter the opening date for the position.
*EEO Statement	"Equal Opportunity Employer" must be selected and included on each posting. Agencies are strongly encouraged to add their agency specific EEO statement to each job posting. This can be placed in the job posting text or in the additional comment box.

* Required

Salary Information

Field	**What to Enter**
Auto-Update	Select Auto-Update to have salary values updated automatically when the associated class specification's salary values are changed.
* Minimum Salary	Enter the minimum salary for the job.
Maximum Salary	Enter the maximum salary for the job.
* Per	Select the rate that coincides with the minimum and maximum salary values.
* Based on "X" hours per year	Select the correct hours per year.
* Show Salary Breakdown	Select one or multiple ways to display the salary values: Hourly, Daily, Weekly, Biweekly, Semi-Monthly, Monthly and/or Annually.

Salary Display	If you do not want to display the salary in a dollar amount, select this checkbox, then select from one of the following values: Depends on Qualifications, Negotiable, Not Displayed, See Position Description or Under Review.

* Required

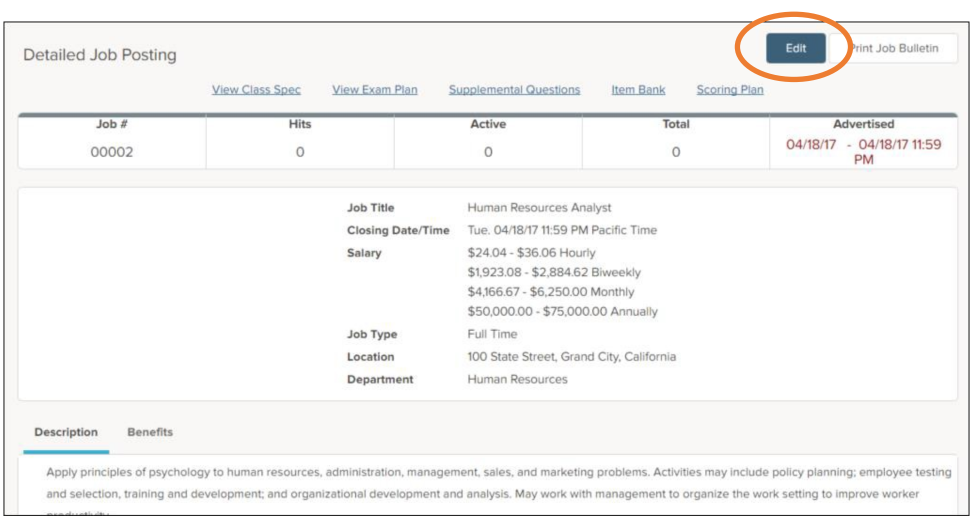
Remaining Job Posting Fields

Field	**What to Enter**
Internal Notes (optional)	Enter any additional information about the job posting in this field. The notes will not display to OHC users or candidates.
* Supplemental Questions	Select “Yes” if the posting will have supplemental questions and select “No” if not.

5. Once you’ve finished, click **Save**.

Note: As soon as the Save button is selected, the posting will go live immediately unless the “Advertise From” date is a future date or the posting is in Draft status.

6. A preview of the job posting will display. Click **Edit** if you need to correct any typing errors or formatting issues and then save your corrections.



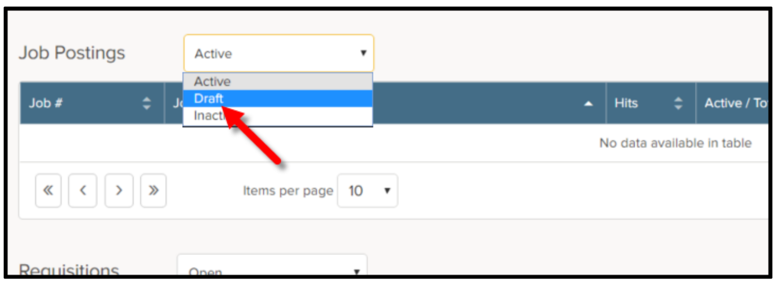
Create Job-Specific Supplemental Questions

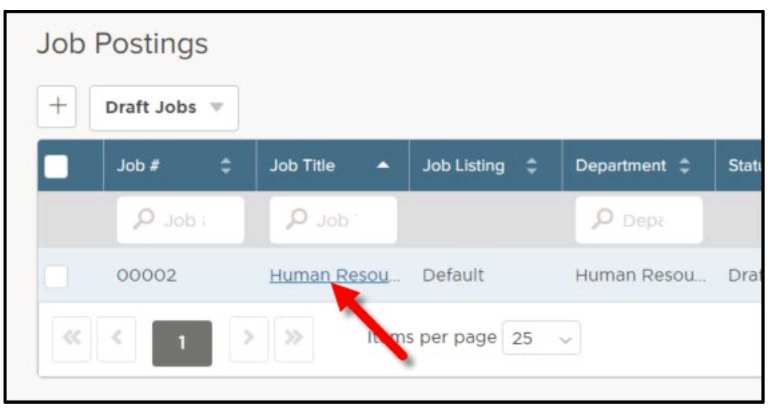
If the job posting is in draft status, continued modifications are allowed, including the addition of job-specific supplemental questions. These types of questions are often used to gather more specific information from candidates regarding their minimum, and even desired, qualifications that pertain specifically to the job opening.

Steps to Create Job-Specific Supplemental Questions

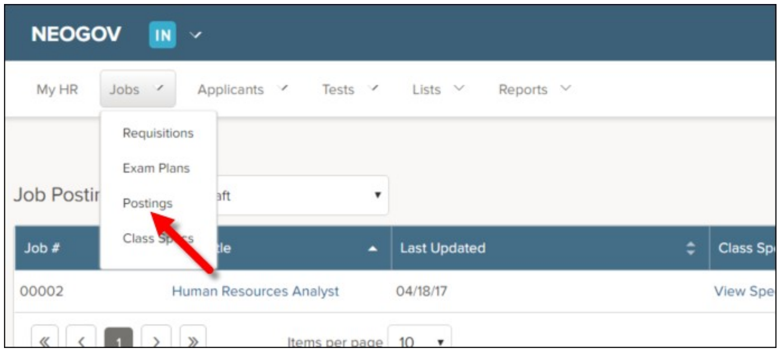
1. Return to the job posting in draft status by using one of the three methods listed below.

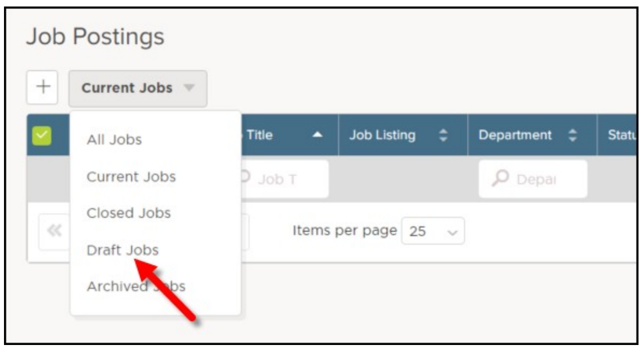
    a. **Method 1:** From the **My HR** page, in the **Job Posting** section's **Status** pulldown, click **Draft** and then click the job title in the **Job Title** column.

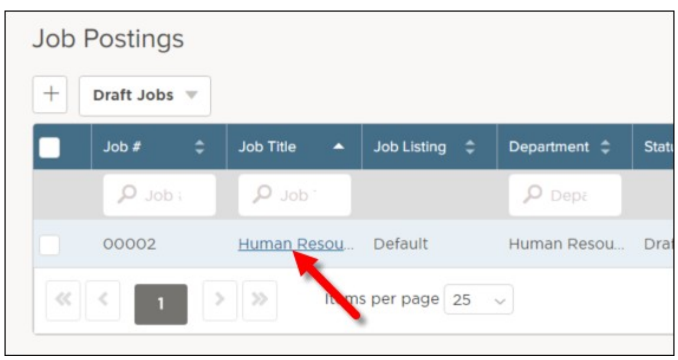




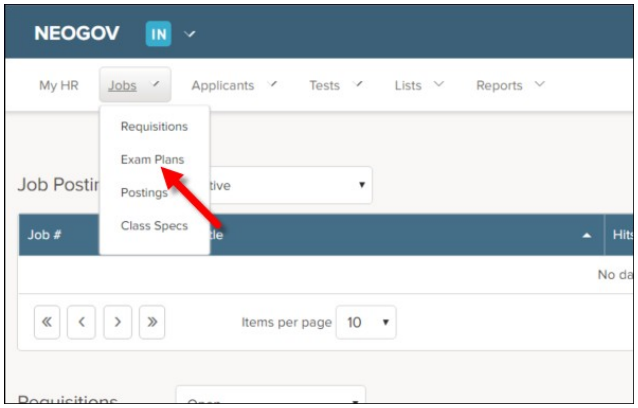
b. **Method 2**: On the **Jobs** menu, click **Postings**. On the **Status** pulldown, click **Draft Jobs.** Click the job title from the **Job Tile** column.

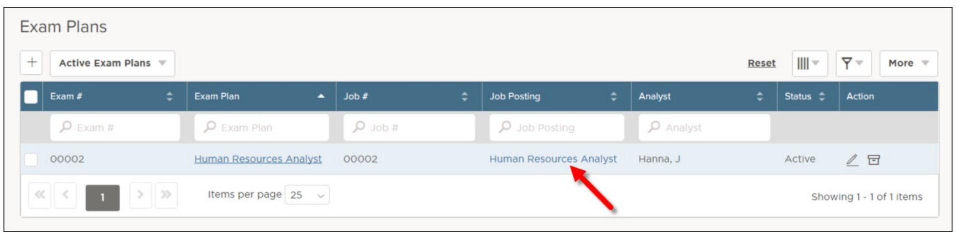




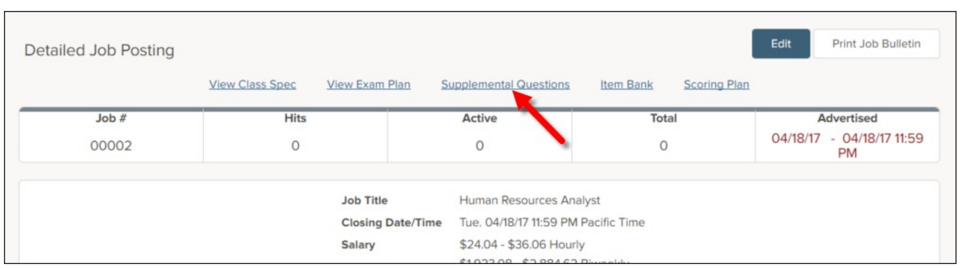


c. **Method 3**: On the **Jobs** menu, click **Exam Plans**. From **Job Title** column, click the job title from the **Job Title** column.





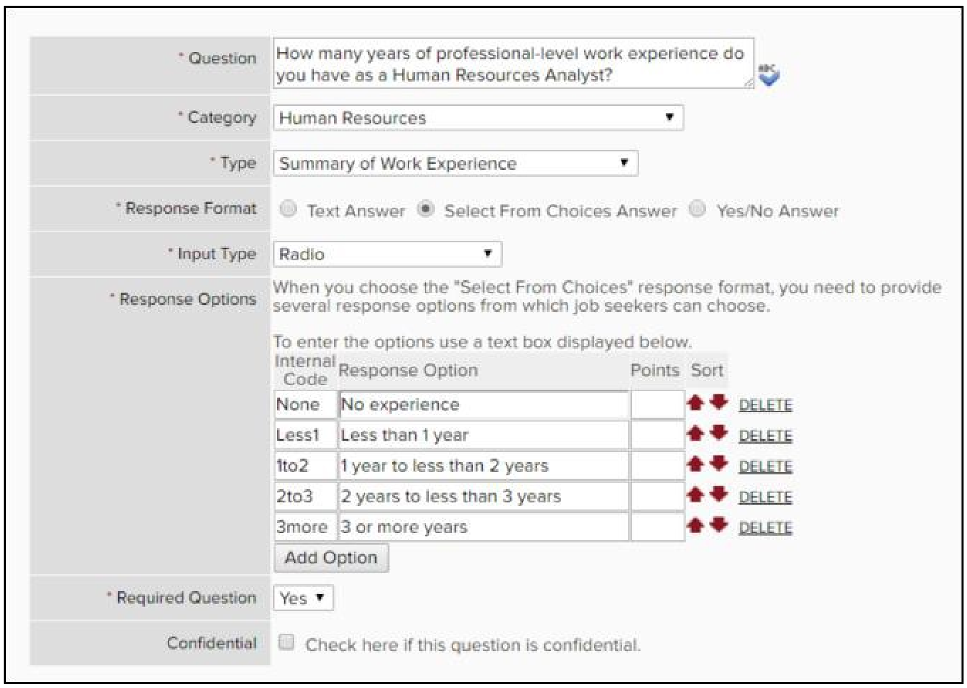
2. From the job posting page, click **Supplemental Questions**.



3. From here, you're prompted to add the first job-specific supplemental question. If the question will only be used for this job posting and not for others like it in the future, proceed to add the question. Otherwise, go to the item bank were the question will be stored for upcoming job postings. For this training example, you'll gain experience adding questions in the item bank. Click **Item Bank**.

4. Click **Add New Item** to add your first item to the item bank.

5. The item form will display.



6. Complete the form using the table below.

* Required

Field	**What to Enter**
* Question	Enter the question.
* Category	Select the proper job category.
* Type	Select the proper question type.
* Response Format	Depending on the question, select Text Answer, Select From Choices Answer or Yes/No Answer.

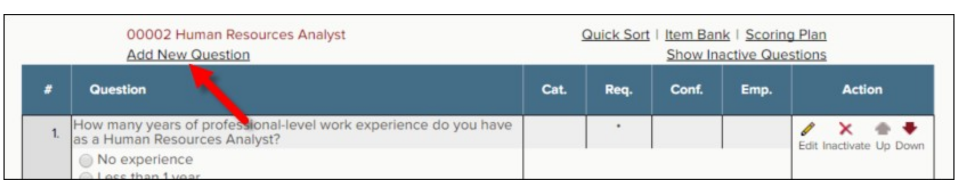
* Input Type	If Response Format is set to Text Answer, select either Scrolling Text Box (a larger text field) or Text (a single line text field). If Response Format is set to Select From Choices Answer, select either Radio, Drop Down Box Single, Drop Down Box Multiple or CheckBox. ***Note***: If the question is multiple choice, use either Radio or Drop Down Box Single. If the question is multiple select, use Drop Down Box Multiple or CheckBox.
* Response Options	Select the appropriate response option for the input type.
* Required Question	Select Yes to prevent candidates from leaving the question unanswered. Select No if answering the question is optional.
Confidential	Select Confidential if there should be restricted viewing of candidates' responses; otherwise, leave the checkbox deselected. Only Insight users with access to view confidential information will see confidential questions. OHC users will not see confidential questions, regardless of permissions.

7. Repeat steps 4-6 to add additional questions.

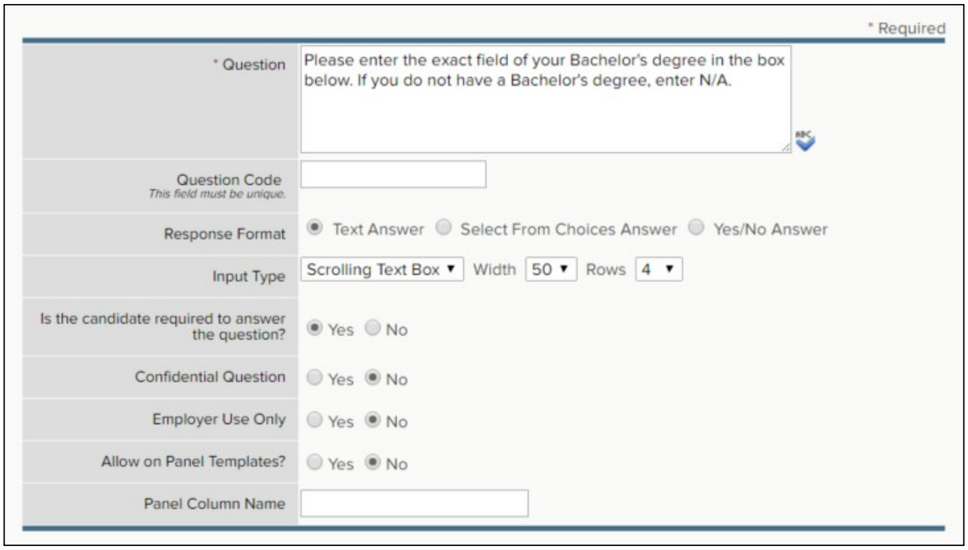
8. From the **Basket** column, click **Add** for all questions you want to add to your job posting.

9. This will add the questions to your basket. Once you've finished, click **Checkout**.

10. Click **Add New Question** to add an additional question to your job posting that will not be stored in the item bank.



11. The question form will display.



12. Complete the form using the table below.

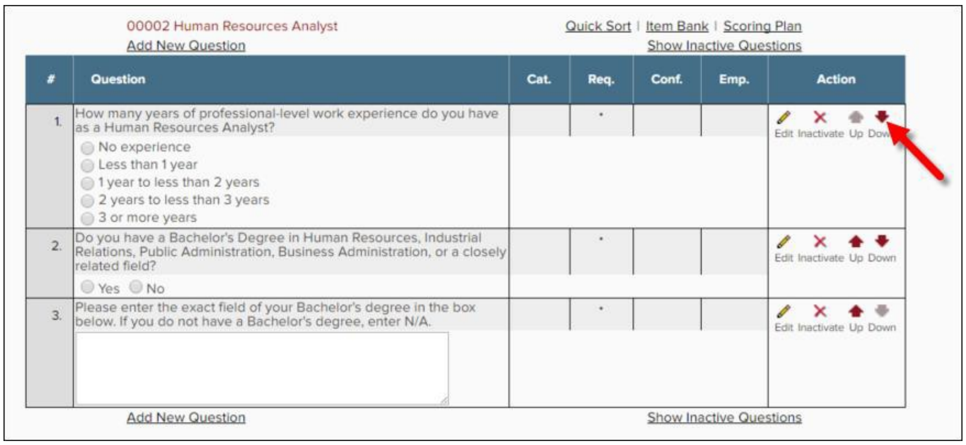
* Required

Field	**What to Enter**
* Question	Enter the question.
Question Code	Enter a code or abbreviation for the question.
* Response Format	Depending on the question, select Text Answer, Select From Choices Answer or Yes/No Answer.
* Input Type	If Response Format is set to Text Answer, select either Scrolling Text Box (a larger text field) or Text (a single line text field). If Response Format is set to Select From Choices Answer, select either Radio, Drop Down Box Single, Drop Down Box Multiple or CheckBox. ***Note***: If the question is multiple choice, use either Radio or Drop Down Box Single. If the question is multiple select, use Drop Down Box Multiple or CheckBox.
* Response Options	If Response Format is set to **Select From Choices Answer**, click **Add Option** to add a response option and enter an abbreviation, number or letter in the Internal Code field, the description in the Response Option field, and optionally, a number in the Points field for auto-scoring setup. Repeat these steps to add additional response options. This option is only available if **Select From Choices Answer** is selected as the response format.
Is the candidate required to answer the question?	Select "Yes" to prevent candidates from leaving the question unanswered. Select "No" if answering the question is optional.
Confidential Question	Select "Yes" to make the question confidential; otherwise, select "No." Only Insight users with access to view confidential information will see confidential questions. OHC users will not see confidential questions,

	regardless of permissions.
Employer Use Only	Select “No” if you want online candidates to see the question. You will only select “Yes” if you want only Insight users to see the question.
Allow on Panel Templates?	Select “No.”
Panel Column Name	Leave this field blank.

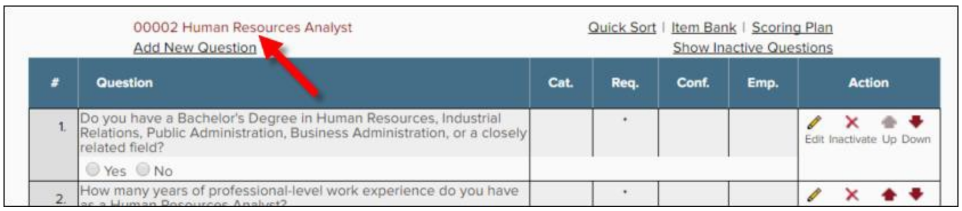
13. Repeat steps 10-12 to add additional questions.

14. Click the up and down arrows to arrange questions in the proper order.

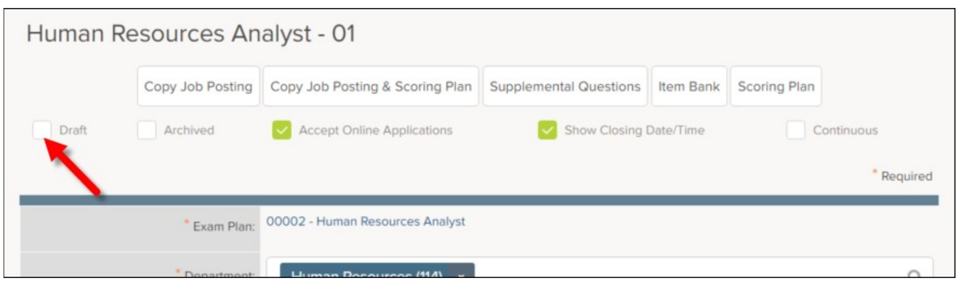


Steps for Publishing the Job Posting on the Web

1. If your job posting is in draft status and you wish to publish it to the web, return to the job posting edit page. If you're editing the supplemental questions, a shortcut to the job posting page exists from the Supplemental Questions page. Click the job number and title that displays in red text.



2. Deselect **Draft**, scroll to the bottom of the page and click **Save**.



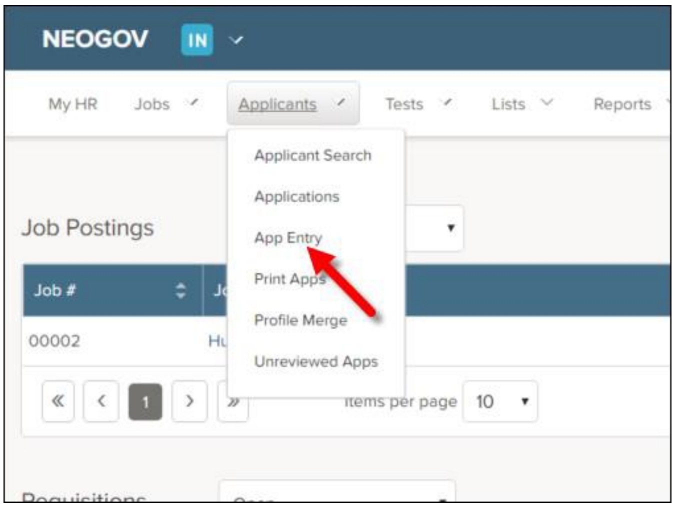
3. Congratulations! You've published your job posting on the web.

Module 4: Enter a Paper Application

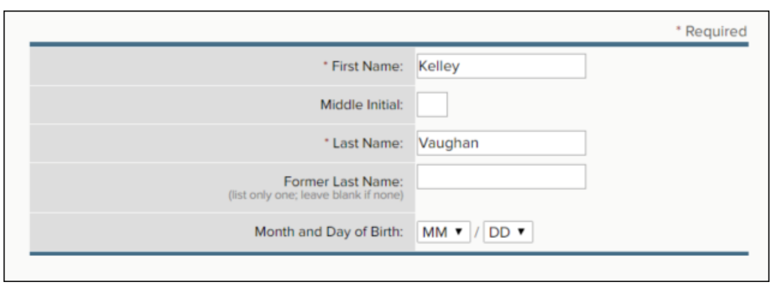
Once a posting has been published for the web, agencies are able to accept online applications. Some agencies allow applicants to submit paper applications for positions. The following steps document how to capture the information submitted on a paper application through Insight.

Steps to Enter a Paper Application

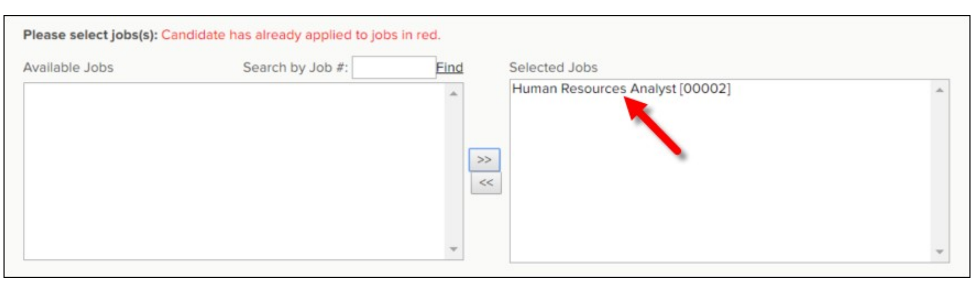
1. On the **Applicants** menu, click **App Entry**.



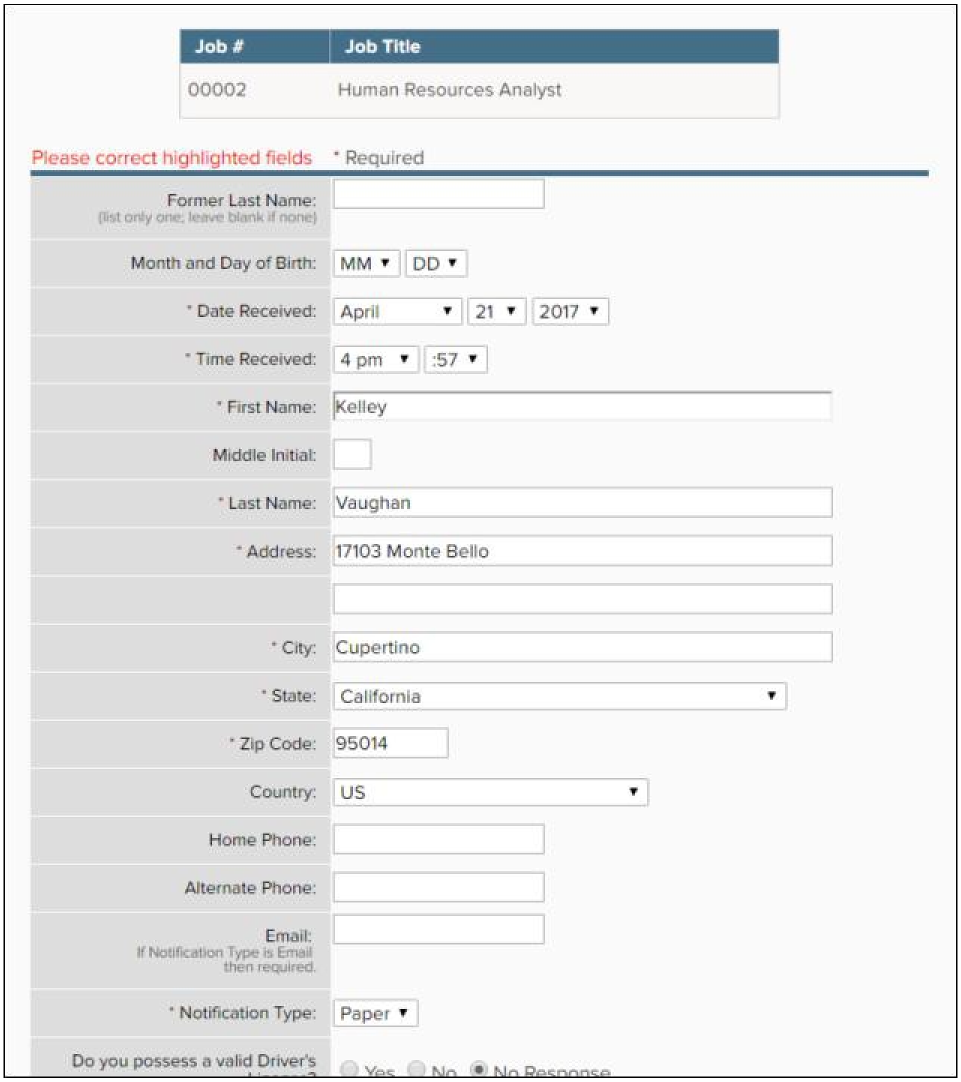
2. Enter the applicant's first and last name.



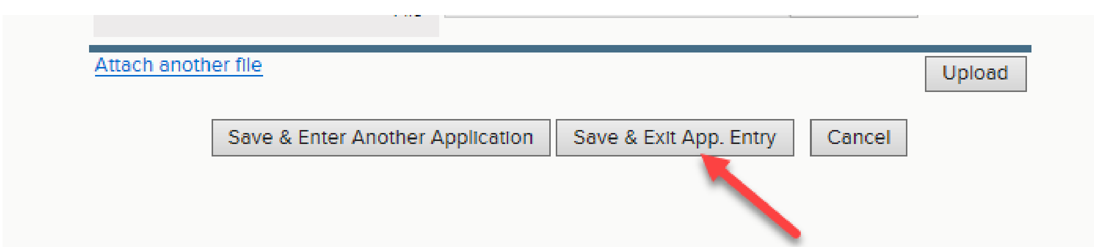
3. Move the job to the **Selected Jobs** box and click **Submit**.



4. Enter the required information on the application form.



5. Once you've finished, click **Save & Exit App. Entry**.



Note: Repeat steps 2–4 to add additional applications and click **Save & Enter Another** until all applications have been entered. Once all application shave been entered, click **Save & Exit App. Entry**.

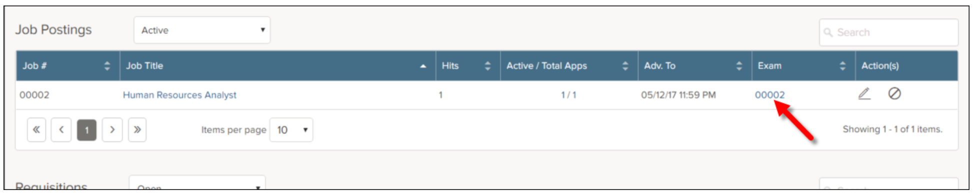
Module 5: Evaluate Candidates and Send Notices

Once applications have been received, you will evaluate the candidates. You can also send notices to anyone that did not meet the minimum qualifications. The system is programmed with the first evaluation step of Application Received. If you have additional evaluation steps that you would like to add, see Module 5a: Create an Evaluation Step.

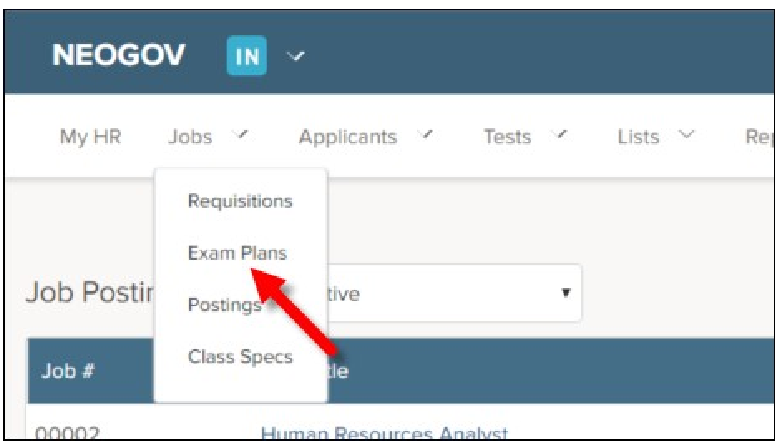
Steps to Evaluate Candidates Manually

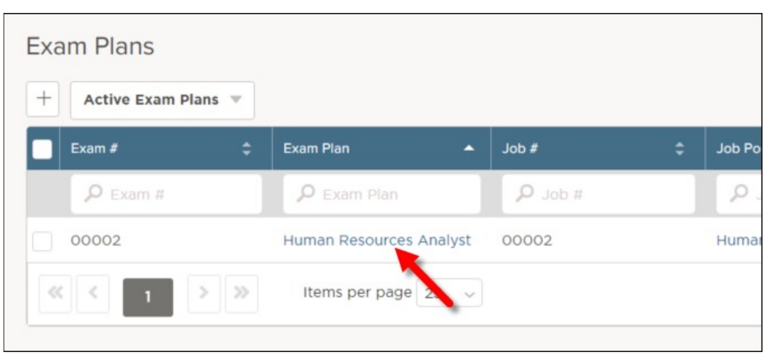
1. Return to the exam plan using one of the following methods.

   a. **Method 1**: Click the exam number from the **My HR** page.

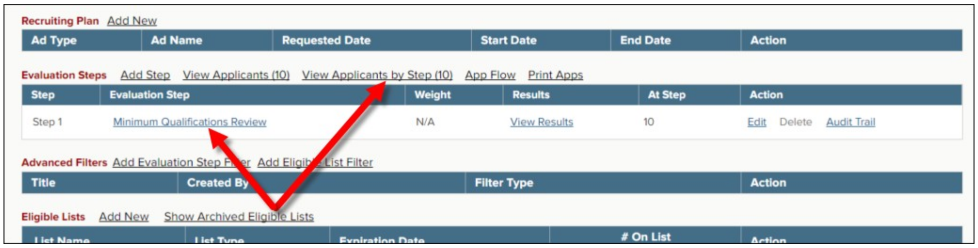


   b. **Method 2**: On the **Jobs** menu, click **Exam Plans** and then click the job title from the **Exam Plan** column.

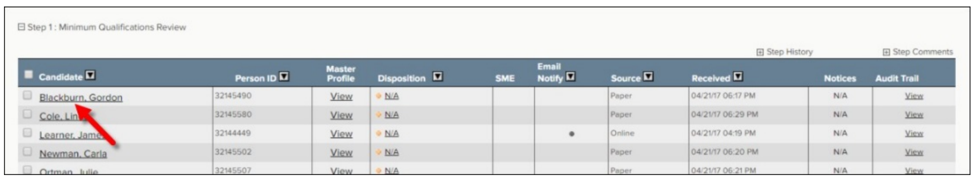




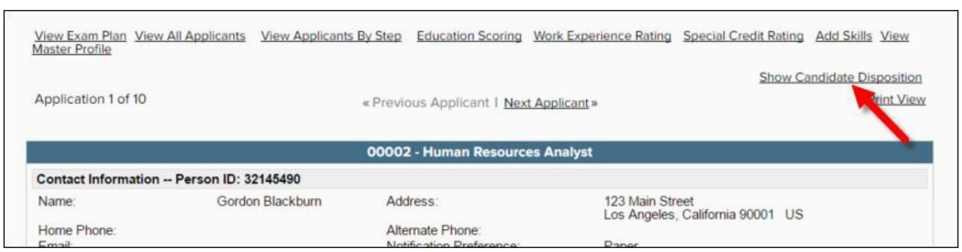
2. Click **View Applicants by Step** or click the name of the evaluation step to view the candidates.



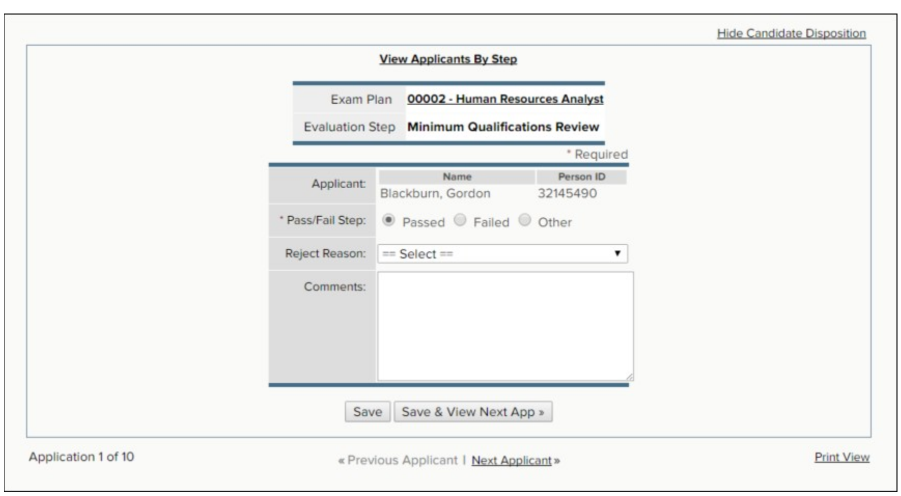
3. Click the name of your first candidate.



4. The application will display. After reviewing the application, scroll to the top of the page and click **Show Candidate Disposition**.

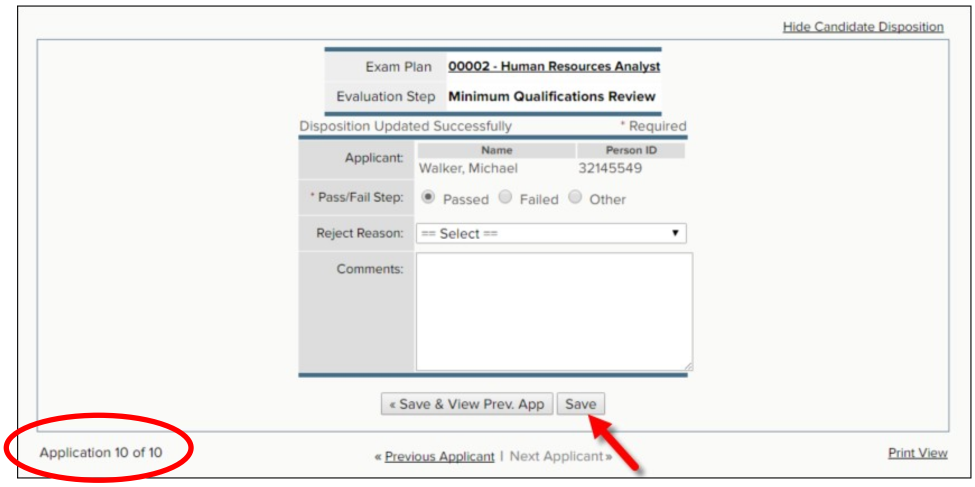


5. The rating panel will display. Click Passed, Failed or Other from the **Pass/Fail Step** field and click **Save & View Next App** to proceed to the next candidate.

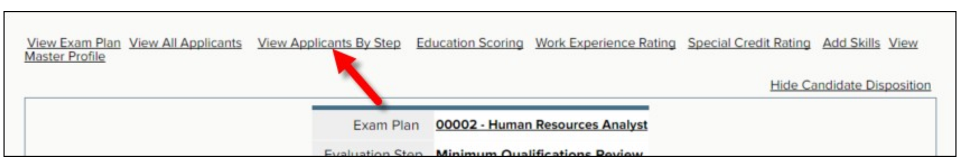


Note: A rejection reason must be selected from the **Reject Reason** pulldown if an applicant is failed.

6. Pass the remaining candidates until you've reached the bottom of the **list**. You'll know when you have reached the bottom by the application count in the lower left corner and the **Save & View Next App** button no longer displays. Pass or reject your last candidate and click **Save**. A confirmation displays stating Disposition Updated Successfully.

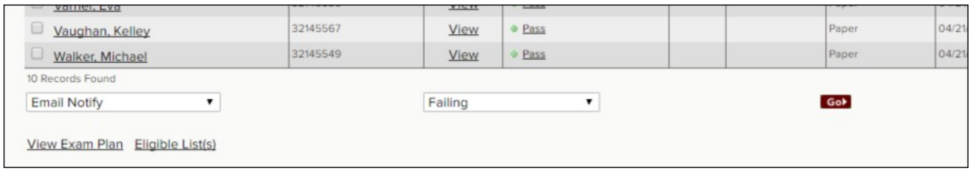


7. Click **View Applicants By Step** to return to your list of candidates.



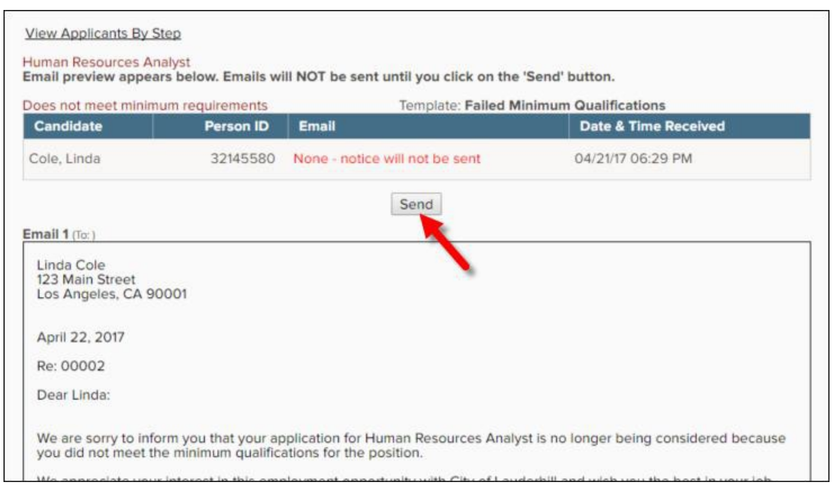
Steps to Send Notices

1. To send a fail notice to the applicable candidate(s), select **Email Notify** from the **Select Action pulldown**, select **Failing** from **the Select Candidate(s) pulldown** and click **Go**.

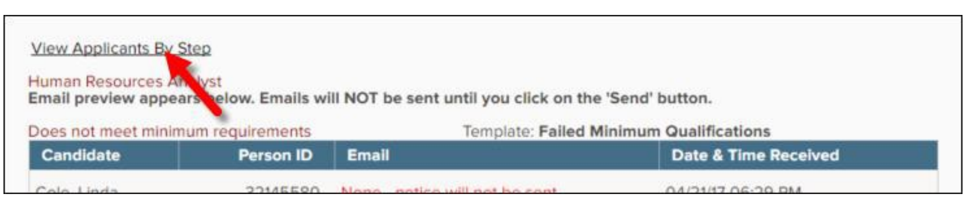


2. Select **Failed Minimum Qualifications** from the **Template** pulldown and click **Generate Notices**.

3. Click **Send** to send the notice(s).



4. A confirmation displays stating "Emails sent successfully." Click **View Applicants By Step** to return to your list of candidates.



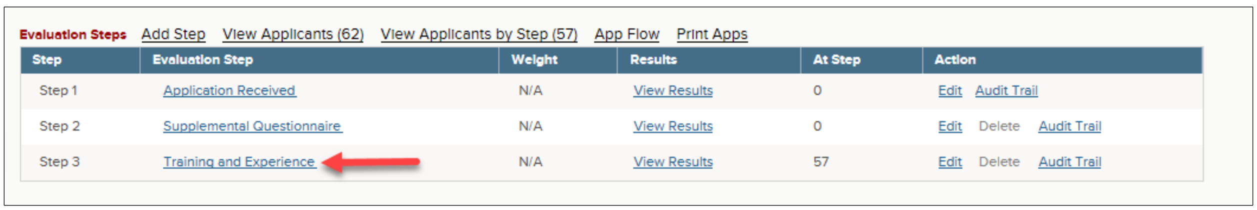
Module 6: Refer Candidates to the Hiring Manager

For this training module, you will place all candidates that passed the minimum qualifications review and any additional evaluation steps on an eligible list. An eligible list is a listing of qualified candidates. From the eligible list, you will refer a subset or all candidates to the hiring department.

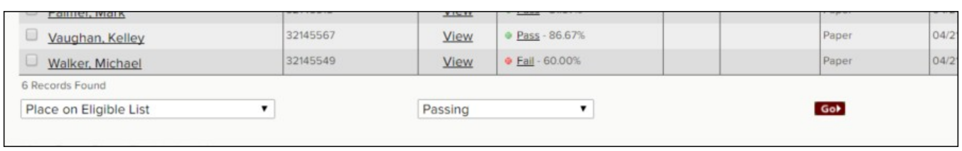
Steps to Place Candidates on an Eligible List

1. Return to the exam plan. From the **My HR** page, click exam number. Alternatively, on the **Jobs** menu, click **Exam Plans** and then click the **Job Title** from the **Exam Plan** column.

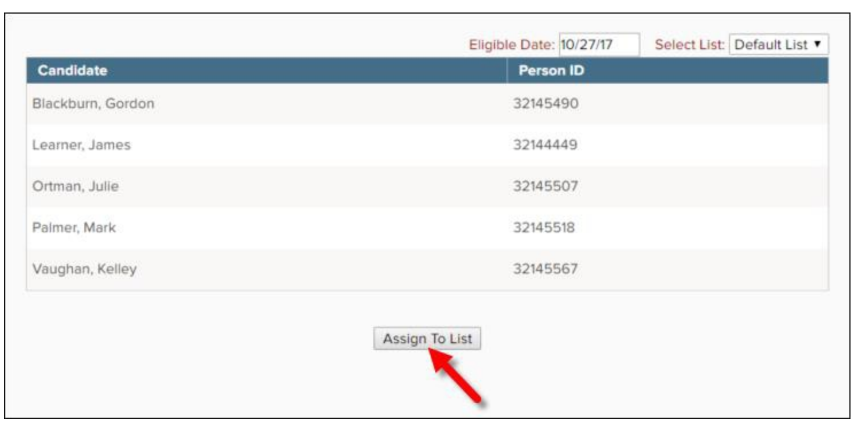
2. Click the name of the last evaluation step to view applicants by step.



3. To place the passing candidates on the eligible list, select **Place on Eligible List** from the **Select Action** pulldown, select **Passing** from the **Select Candidate(s) pulldown** and then click **Go**.



4. Leave the default to **today's date** from the **Eligible Date**, the default of **Default List** from the **Select List field** and click **Assign To List**.



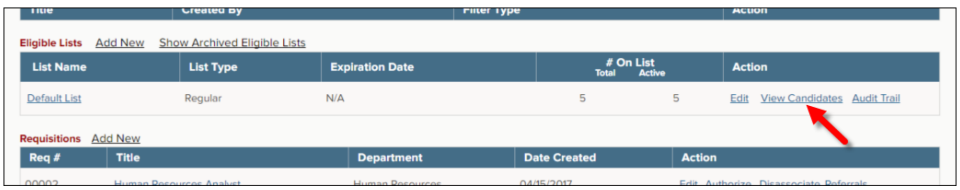
Create a Referred List

In the previous section, you learned how to place candidates that passed an evaluation step on an eligible list. You will now refer these same candidates to the hiring department. This referral action creates a referred list. Once the referred list is created, the hiring manager can begin reviewing applications, scheduling candidates for hiring interviews and eventually hire the ideal candidate.

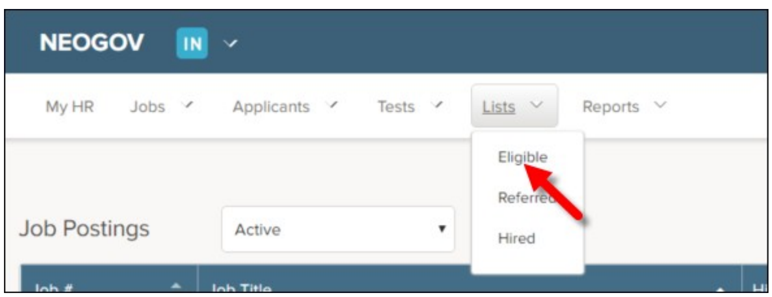
Steps to Create a Referred List

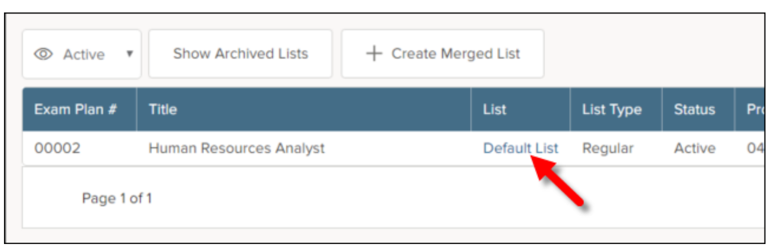
1. If you're not already viewing your eligible list, return to the eligible list.

    a. **Method 1**: Return to your exam plan and click **View Candidates** from the **Eligible Lists** section.

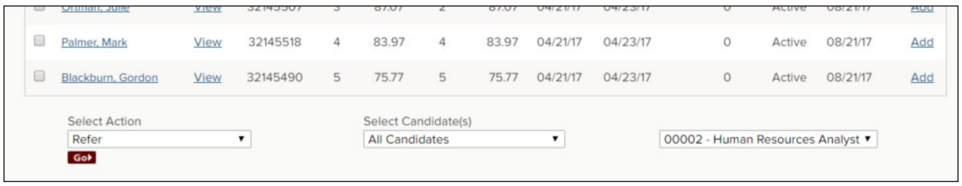


    b. **Method 2**: Click **Eligible** on the **Lists** menu and then click the **list name** from the **List** column.

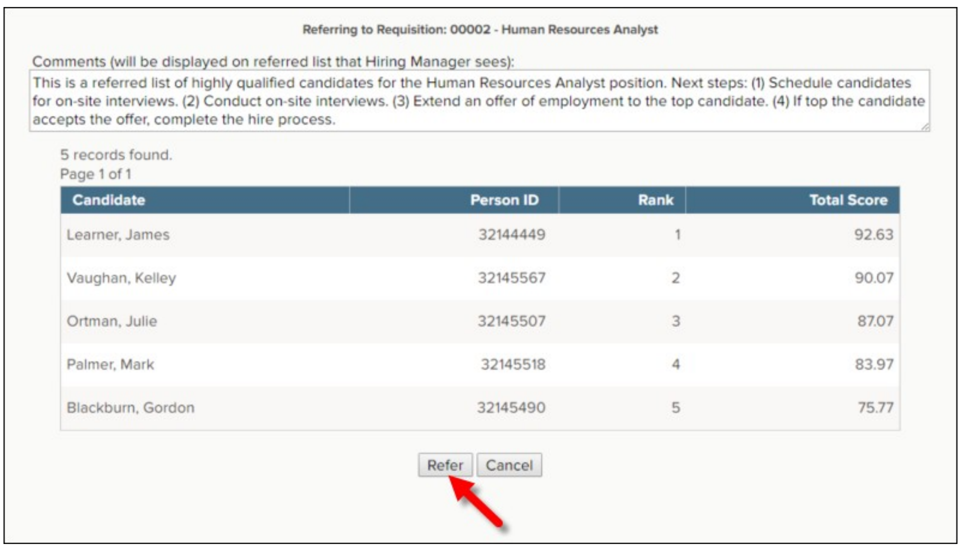




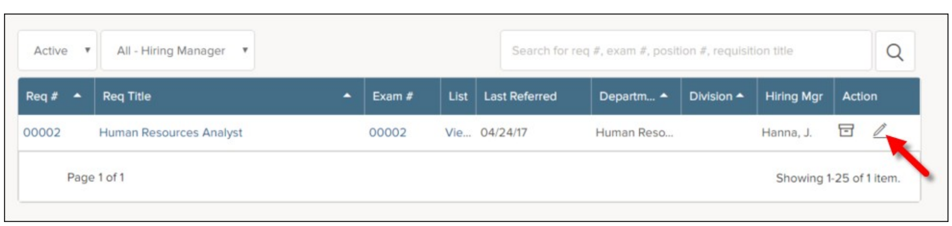
2. To create a referred list, select **Refer** from the **Select Action** pulldown, select **All Candidates** from the **Select Candidate(s)** pulldown, select the open **requisition** from the **Select Requisition** pulldown and click **Go**.



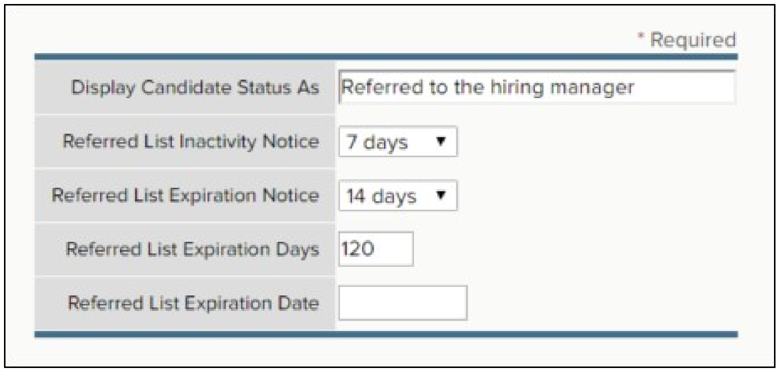
3. The Refer Eligible Candidates page will display. Enter any informational text in the Comments box. Click **Refer** when you've finished. This will send an email notification to all hiring managers assigned to the requisition regarding the new referred list of candidates. The text entered in the Comments box will display in the email notification.



4. To edit the referred list settings, from the **Action** column click the **Edit** icon .



5. The Edit Referred List page will display.



6. Complete the form using the table below.

* Required

Field	What to Enter
Display Candidate Status As	This message will display to candidates who sign back into Career Pages to see their current application status. For example, enter "Referred to hiring manager," or something similar.
Referred List Inactivity Notice	An email notification will be sent to the assigned analyst if the assigned hiring managers have not taken action on the list after the number of days specified in this field.
Referred List Expiration Notice	An email notification will be sent to the assigned hiring managers regarding the soon-to-be-expired list based on the number of days specified in this field.
Referred List Expiration Days	Enter the total number of days or specific expiration date (below field). Not both.
Referred List Expiration Date	Enter a specific expiration date or the total number of days (above field). Not both.

7. Click **Save** once you've finished.

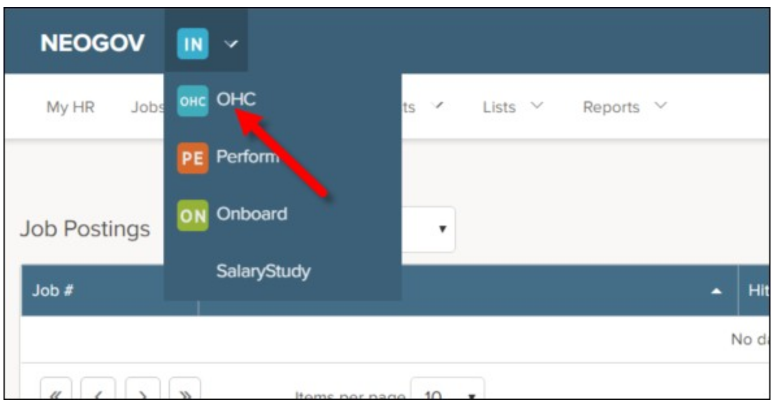
Module 7: Complete Interview and Hiring Tasks in the OHC

In the previous training module, you created a referred list of qualified candidates for the assigned hiring manager to review. This will send an email notification to the hiring manager assigned to the requisition regarding the new referred list of candidates. Now the hiring manager can begin reviewing applications, scheduling candidates for hiring interviews and eventually hire the ideal candidate.

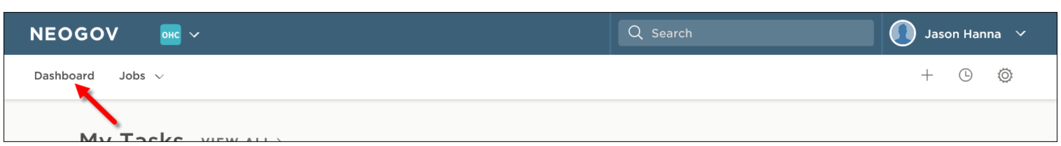
The subsequent steps are used by the hiring manager to complete interview and hiring tasks from the OHC. Some agencies allow hiring managers outside of the HR office to access the system through the OHC, while others do not. Please check your agency's policies and procedures to determine who is responsible for this portion of the hiring process.

Steps to Schedule Interviews

1. If you're not already in the OHC, select **OHC** from the **NEOGOV Product** menu.



2. Click Dashboard from the upper left corner if you do not see the **My Candidates** section.



3. From the **My Candidates** section, click the referred list that will have scheduled interviews.

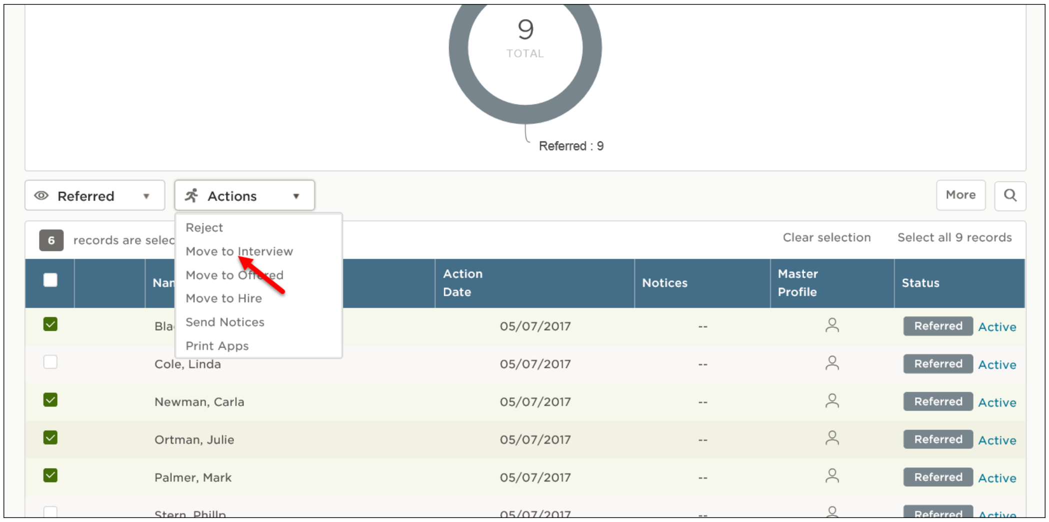
My Candidates

Req #	Requisition Title	Candidates	Department	Division	Hiring Manager	Created On
00002	Human Resources Analyst	9	Human Resources	Administration	Jason Hanna	05/03/2017
00006	Administrative Assistant	9	Public Works	Roads	Jason Hanna	05/07/2017

Showing 1 - 2 of 2 items

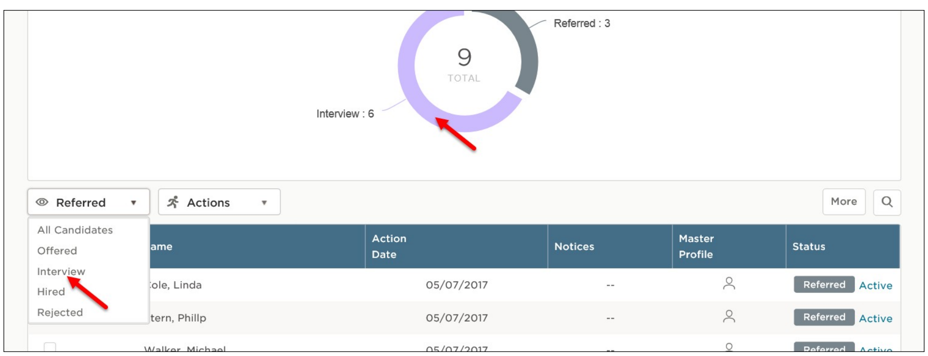
4. Select the candidates that will be moved to the interview step.

5. On the **Actions** menu, click **Move to Interview**.

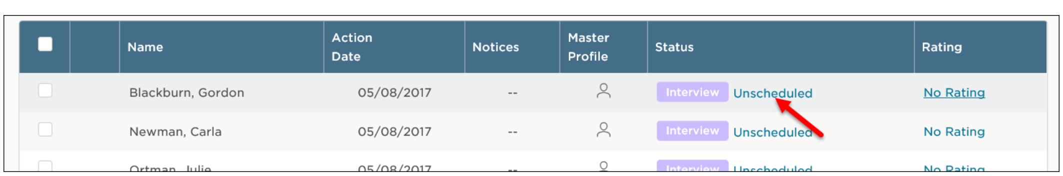


6. Click **OK** to confirm moving the candidates.

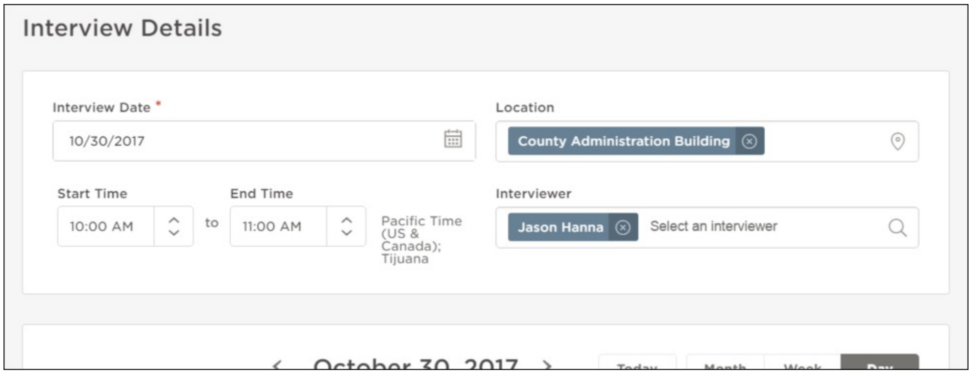
7. The selected candidates have been moved from the referred step to the interview step. To schedule interviews, the view must be switched to the Interview step. Click **Interview** on either the **doughnut chart** or **Candidates** menu.



8. Click **Unscheduled** for the first candidate to be scheduled for an interview.



9. The Interview Details page will display.



10. Complete the form using the table below.

* Required

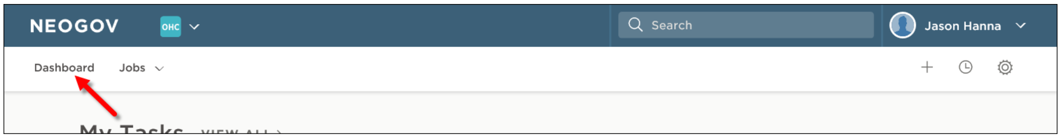
Field	What to Enter
* Interview Date	Enter the interview date.
Location	Enter the interview location.
Start Time	Enter the interview start time.
End Time	Enter the interview end time.
Interviewer	Select the interviewer name.

11. Once you've finished, click **Save.**

12. Repeat steps 8-11 to schedule the remaining candidates for interviews.

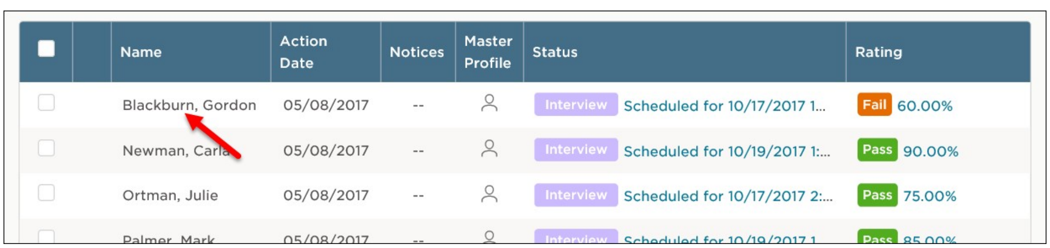
Steps to Reject a Single Candidate in the OHC

1. Return to the referred list if you're not already viewing the referred list of candidates. From the **My Candidates section**, click the referred list.

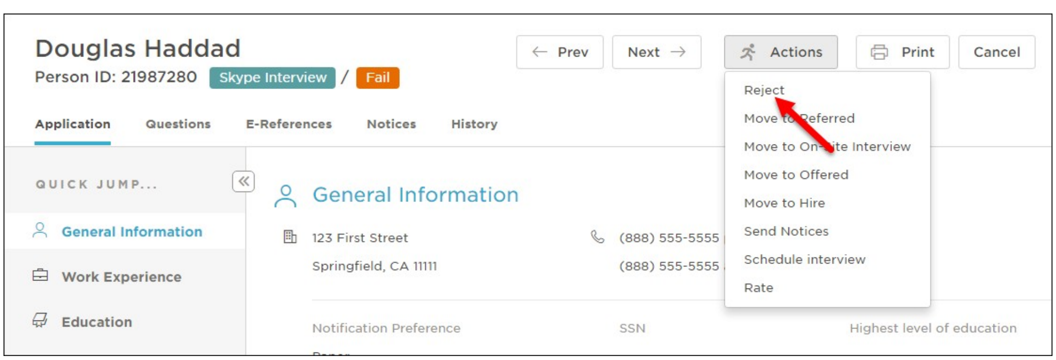


2. On the **doughnut chart** or on the **Candidates menu**, click the step name where you have reviewed candidates and determined one or more will be rejected.

3. Click the name of the first candidate to be rejected.



4. On the **Actions** menu, click **Reject**.



5. Click and select a reject reason.

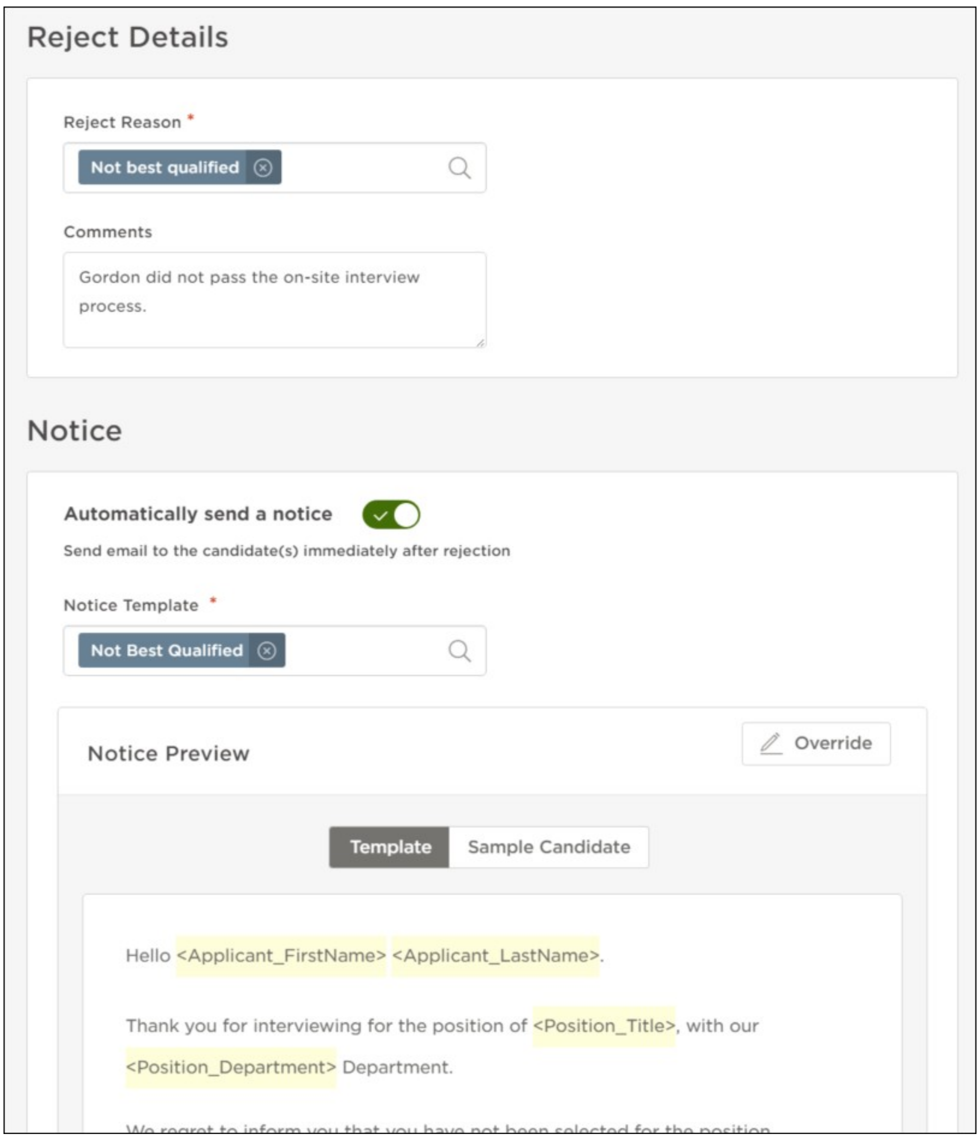
6. If preferred, enter comments providing more details.

7. Additionally, you can choose to automatically send a notice to the candidate. From the "Automatically send a notice" switch, click to turn on the setting.

Note: If you'd prefer to leave this switched off and send all rejected candidates notices at the same time, follow the steps outlined in the upcoming, *Send Rejection Notices in Bulk* section.

8. If you chose to automatically send a notice to the candidate upon rejection, select the proper notice template associated with your rejection reason.

9. If necessary, click **Override** to make a one-time update to the notice prior to sending.



10. Once finished, click **Save**.

11. Repeat these steps for any remaining rejected candidates.

Steps to Reject Candidates in Bulk in the OHC

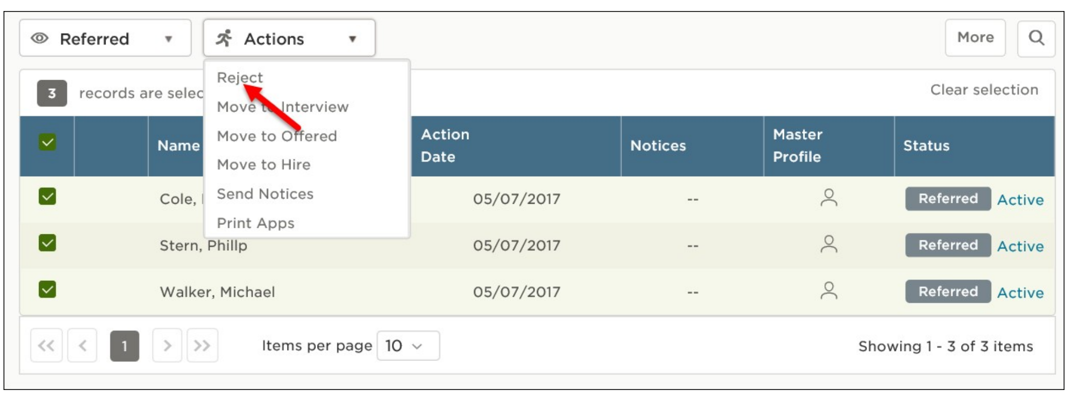
Alternatively, you can reject multiple candidates at the same time. This process will designate the same reject reason and comments for all selected candidates. As a result, you may have a few rounds of bulk rejecting if candidates have different reject reasons and/or comments.

1. If you're not already viewing the referred list of candidates, return to the **My Candidates** section on the dashboard. From the **My Candidates** section, click the referred list.

2. On the **doughnut chart** or on the **Candidates** menu, click the step name where you have reviewed candidates and determined multiple candidates will be rejected.

3. Select all candidates that will have the same reject reason and comments.

4. On the **Actions** menu, click **Reject**.



5. Click  and select a reject reason.

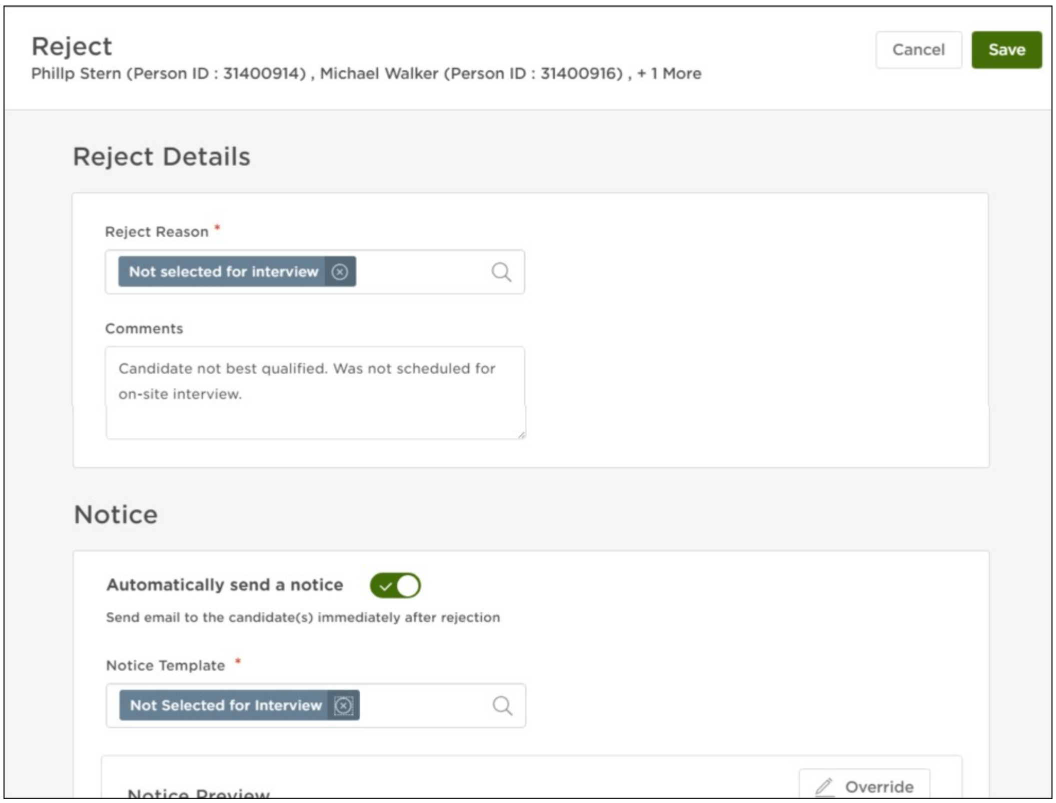
6. If preferred, enter comments providing more details.

7. Additionally, you can choose to automatically send a notice to the candidate. From the "Automatically send a notice" switch, click to the on setting.

Note: If you'd prefer to leave this switched off and send all rejected candidates notices at the same time, follow the steps outlined in the upcoming, *Send Rejection Notices in Bulk* section.

8. If you chose to automatically send a notice to the candidate upon rejection, select the proper notice template associated with your rejection reason.

9. If necessary, click **Override** to make a one-time update to the notice prior to sending.



10. Once finished, click **Save**.

11. Repeat these steps for any remaining rounds of rejected candidates.

Send Rejection Notices in Bulk in the OHC

If you've rejected all applicable candidates for various reasons but haven't yet sent them notices, you can do so in bulk.

Steps to Send Rejection Notices in Bulk in the OHC

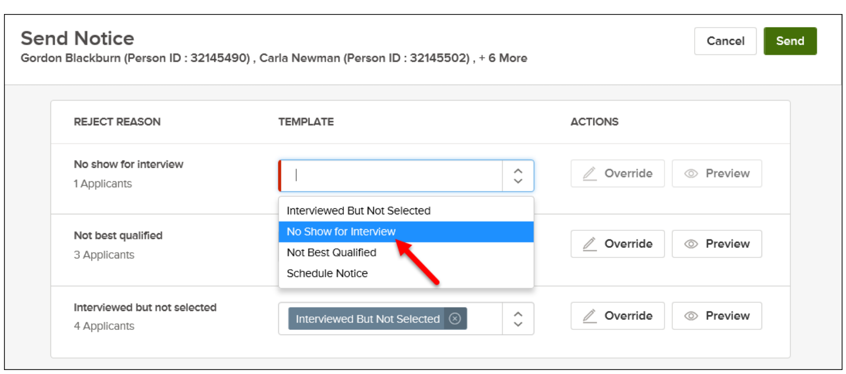
1. If you're not already viewing the referred list of candidates, return to the **My Candidates** section on the dashboard. From the **My Candidates** section, click the referred list by selecting the requisition in the **Requisition Title** column.

2. Click **Rejected** on either the **doughnut chart** or on the **Candidates** menu.

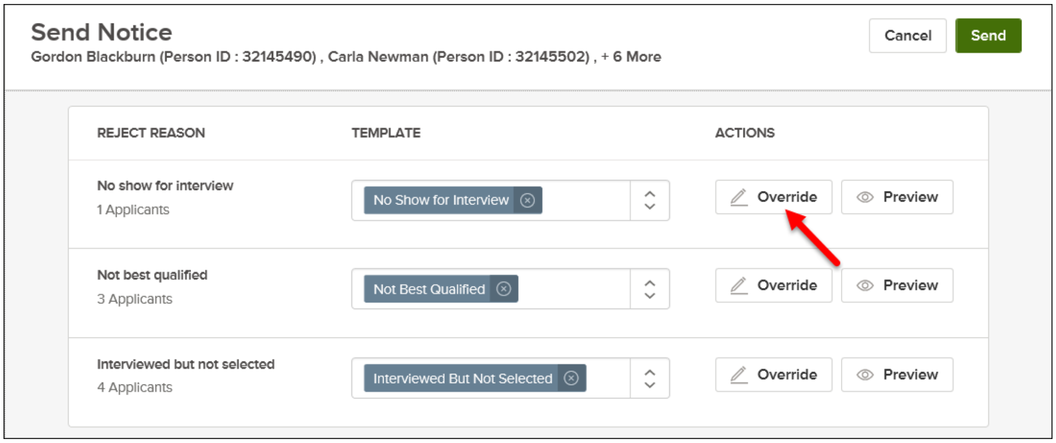
3. Select all candidates that will receive rejection notices.

4. On the **Actions** menu, click **Reject**.

5. A list of notice templates will display based on the reject reason selected. Verify that the correct template is selected at this time.



6. If necessary, click **Override** to make a one-time update to the notice prior to sending. This update will not affect the saved notice template.



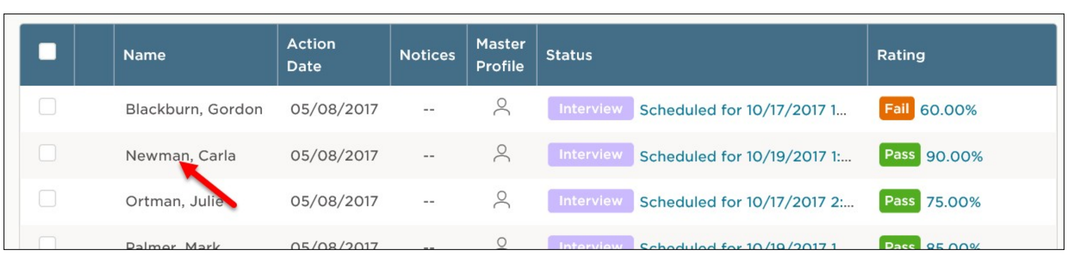
7. Once finished, click **Send**.

Steps to Make an Offer

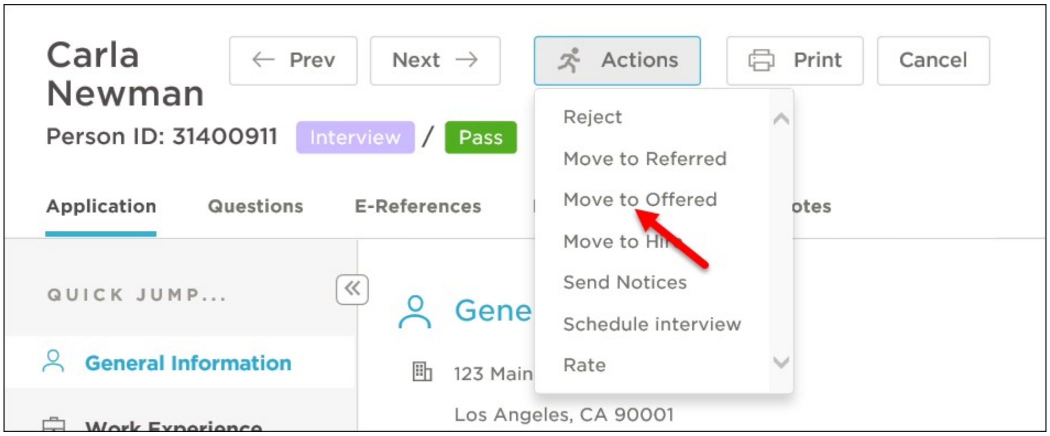
1. If you're not already viewing the referred list of candidates, return to the **My Candidates** section on the dashboard. From the **My Candidates** section, click the referred list.

2. On the **doughnut chart** or on the **Candidates** menu, click the step name where you have reviewed candidates and will make an offer for one of them.

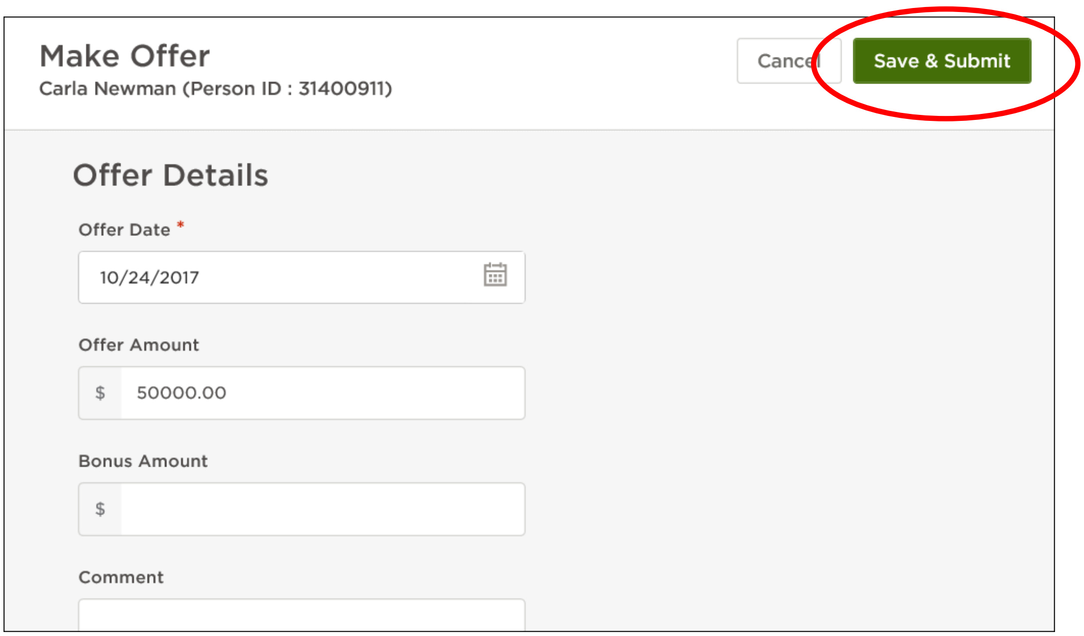
3. Click the name of the candidate to receive the offer.



4. On the **Actions** menu, click **Move to Offered**.



5. Enter the offer date and any additional details including dollar values and comments.

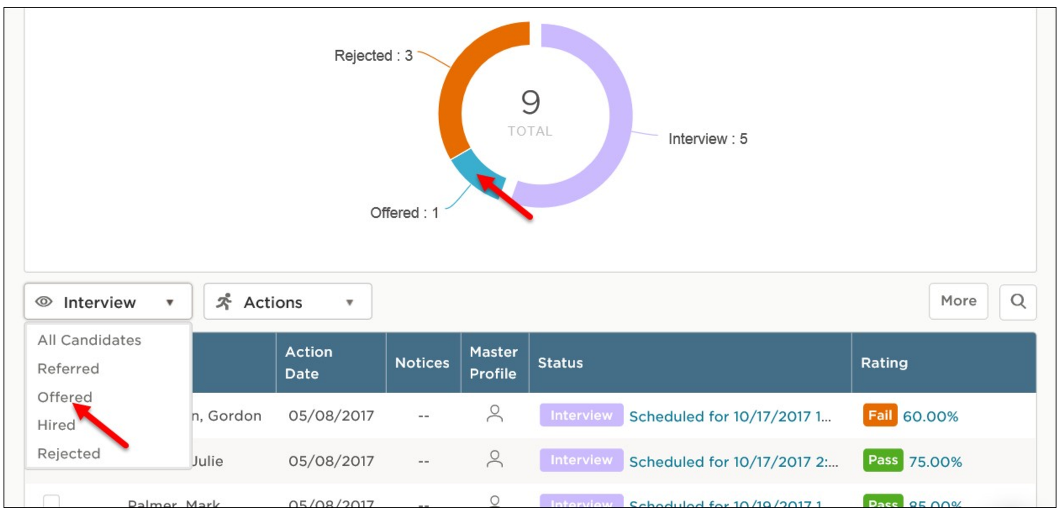


6. Once finished, click **Save & Submit**.

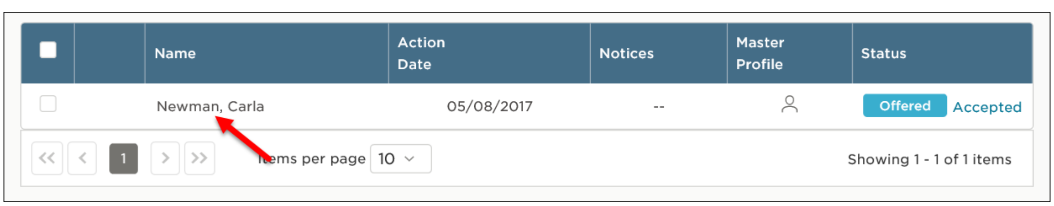
Steps to Hire a Candidate

1. If you're not already viewing the referred list of candidates, return to the **My Candidates** section on the dashboard. From the **My Candidates** section, click the referred list in the **Requisition Title** column.

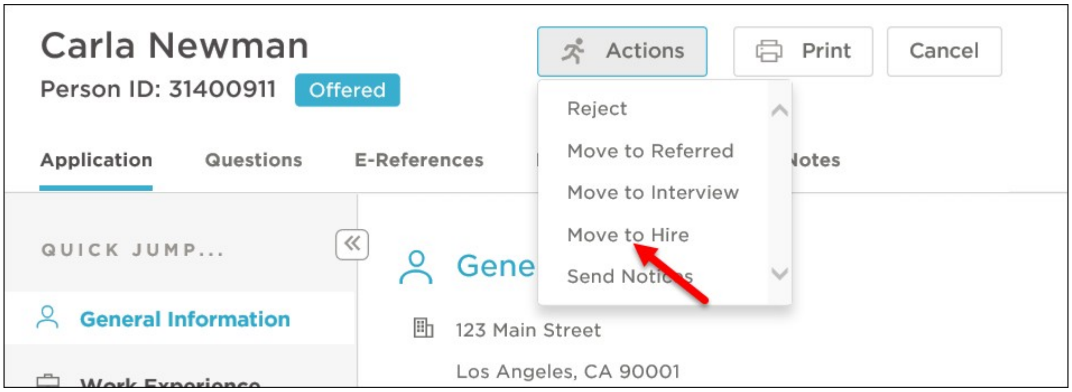
2. On the **doughnut chart** or on the **Candidates** menu, click the **Offered** step.



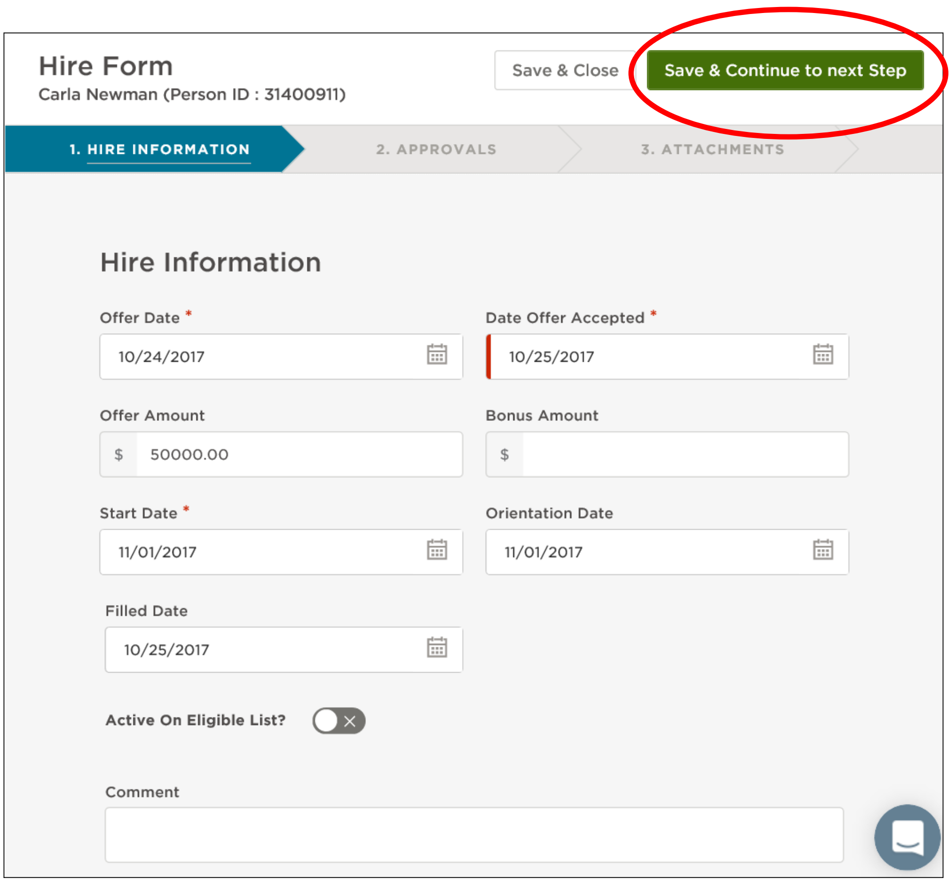
3. Click the name of the candidate to hire.



4. On the **Actions** menu, click **Move to Hire**.



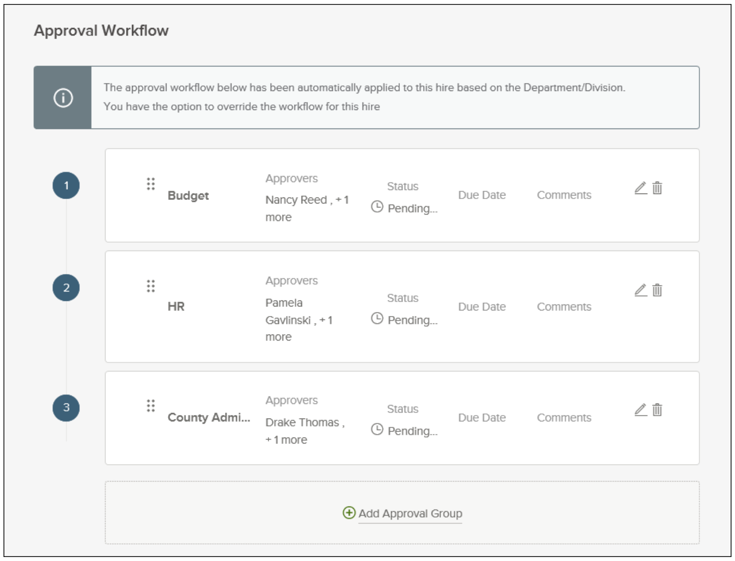
5. Enter the start date and any additional details.



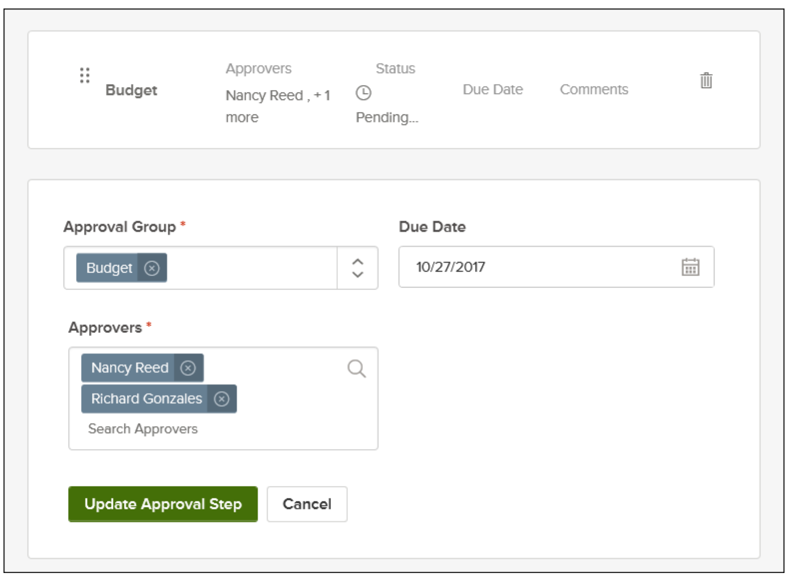
6. Once finished, click **Save & Continue to Next Step**.

Note: If you're not quite ready to submit the hire, click **Save & Close**. The hire will display in your referred list with a pending release status. Once you're ready to submit, edit the hire, make any updates and click **Save & Submit**.

7. If you have an approval workflow template, it will display on the second hire form page. In the event changes are required, you have the option to override the workflow. Any changes will only be applied to this hire, not the saved approval workflow template.

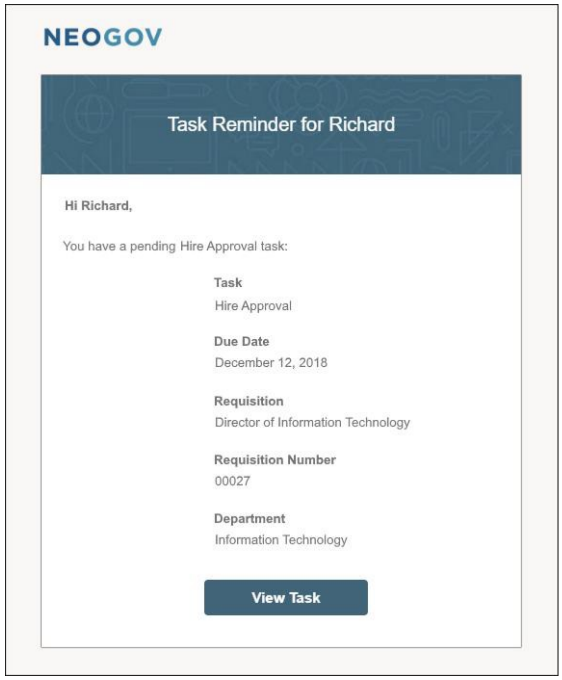


8. If you prefer to keep the assigned approver(s) reminded about the approval task with a due date, click , enter a due date and then click **Update Approval Step**.



9. Repeat these steps for all remaining approval steps that require due dates.

Note: The assigned approver(s) will receive a reminder email from info@neogov.com, with the subject line, NEOGOV OHC Task Reminder, on the due date and each day the approval task is past due until the task is completed. The reminder email will include a View Task button, guiding the approver(s) to the task requiring attention.

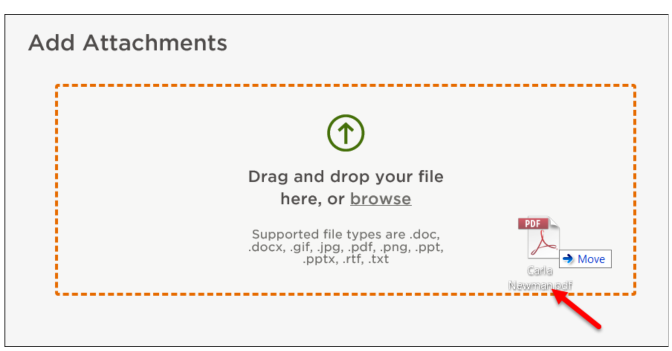


10. If a template for your agency/division does not exist, you will be prompted to create an approval workflow. You have two options: (1) create an approval workflow or (2) skip the approval workflow and click **Save & Continue to Next Step**. To create an approval workflow, follow the step under the Create an Approval Workflow section.

Create an Approval Workflow

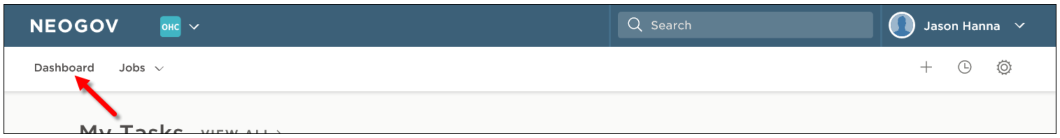
a. Click the **+Add Approval Group** link.
b. On the **Approval Group** pulldown, click the applicable approval group.
c. Enter a Due Date in the due Date field (optional).
d. From the **Approvers** field, click and select the applicable approver(s).
e. Click **Add Approval Step**.
f. Click **+Add Approval Group** and repeat these steps for the remaining approval steps.
g. Once you've finished, click **Save & Continue to Next Step**.

11. Drag any file attachments to the third hire form page and click **Save & Submit**.

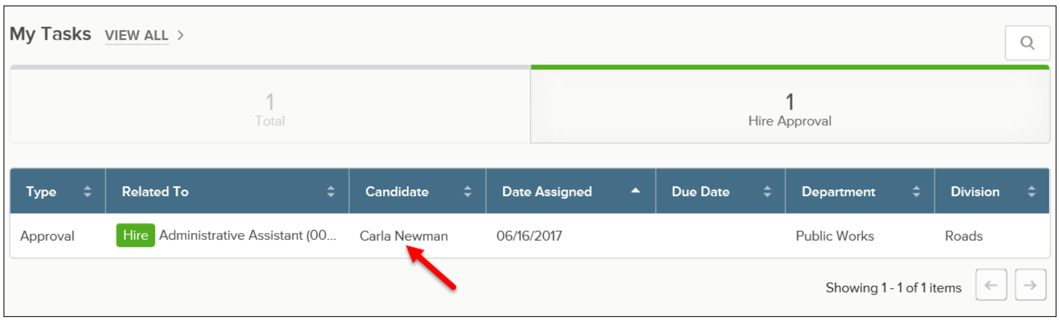


Steps to Approve a Hire

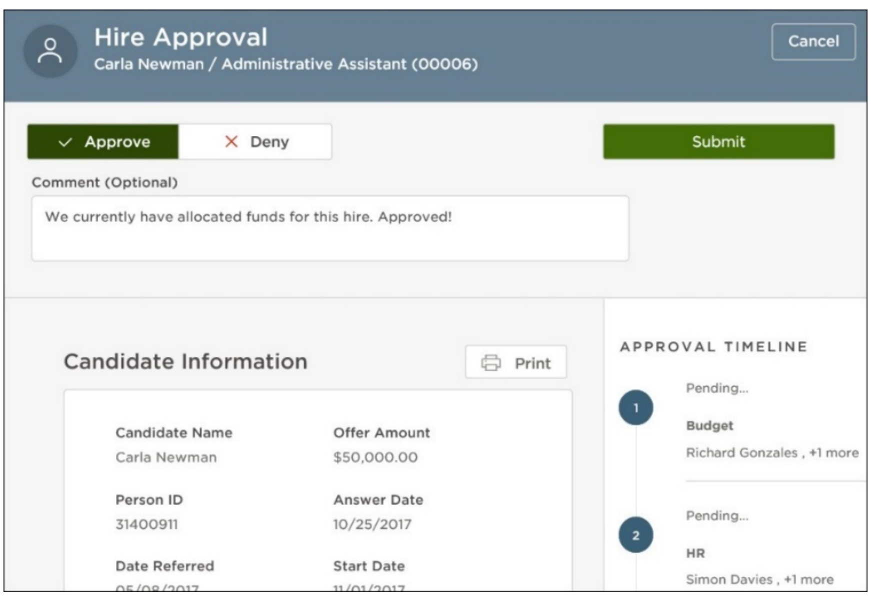
1. If you're not already viewing your dashboard page, click **Dashboard** in the upper left corner.



2. From the **My Tasks** section, click the hire pending your review.

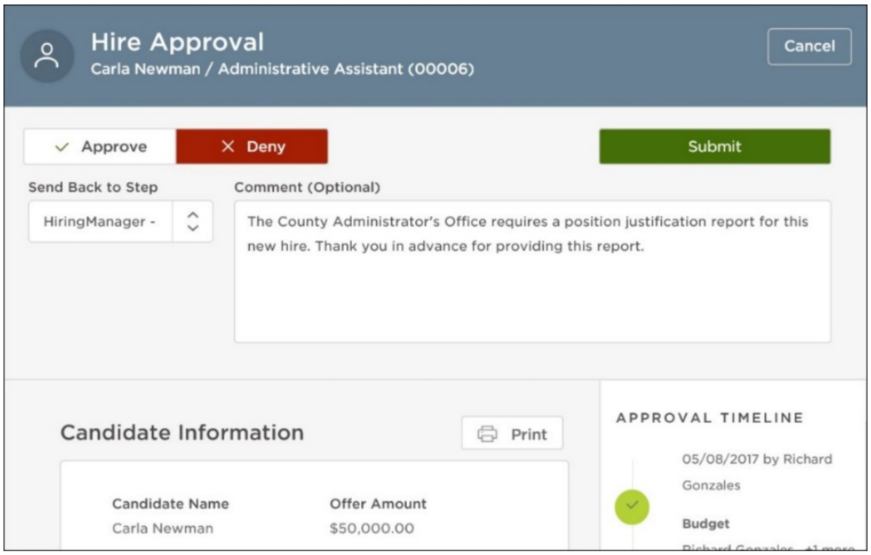


3. Click **Approve**, type any comments and click **Submit**.



4. If a workflow approval process is established, the hire must be approved by all groups and sent to HR for final approval.

Note: Approvers have the option of denying a hire. If this is done, the hire record can be sent back to any one of the previous approval groups or all the way back to the hiring manager. Depending on the circumstances of the denial (e.g., additional justification), the hire approval process can be restarted.



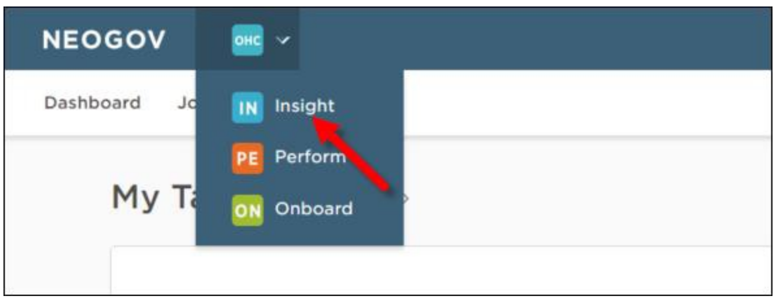
Module 8: Authorize a New Hire and Fill a Requisition — Insight

In the previous training module, you completed the hiring, interviewing and new hire tasks in the Online Hiring Center. When the new hire task is completed, an email notification will be sent to the assigned analyst of the requisition regarding the new hire.

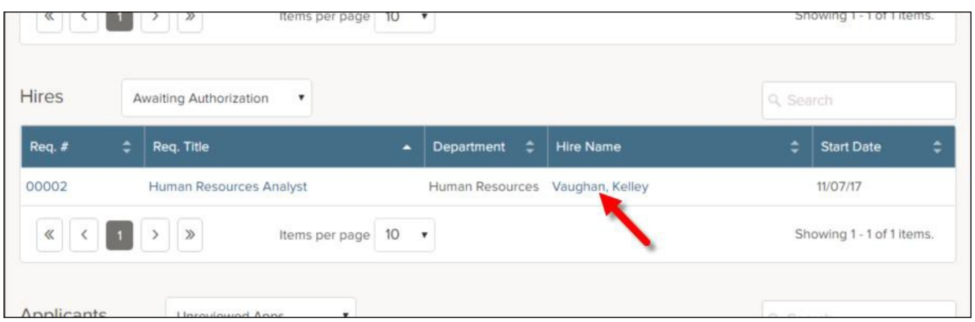
For this training module, you will be performing two close out tasks: authorizing the new hire and filling the requisition.

Steps to Authorize a New Hire and Fill a Requisition

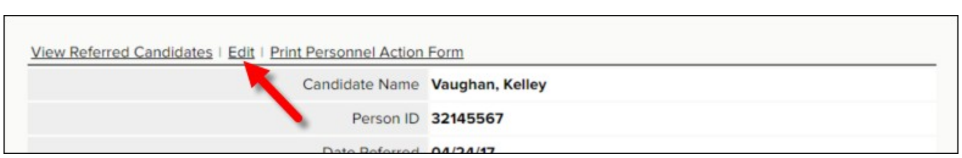
1. If you're not already in Insight, return to Insight by selecting **Insight** on the **NEOGOV Product menu**.



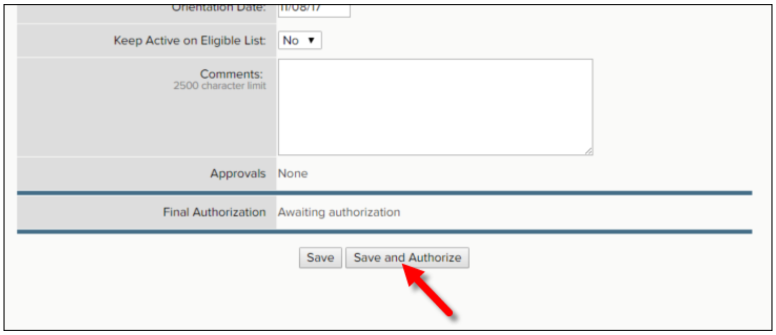
2. The recently-hired candidate displays from the **Hires** section on your **My HR** page. Click the name of the candidate.



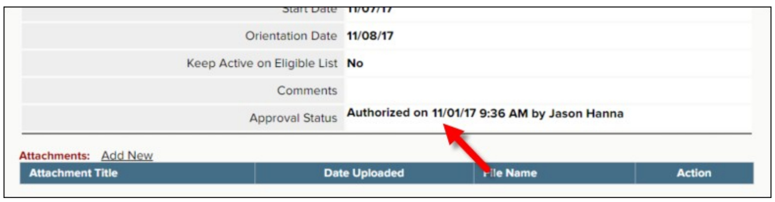
3. The personnel action form will display. Review the form and then click **Edit** to start the authorization process.



4. Click **Save and Authorize**.



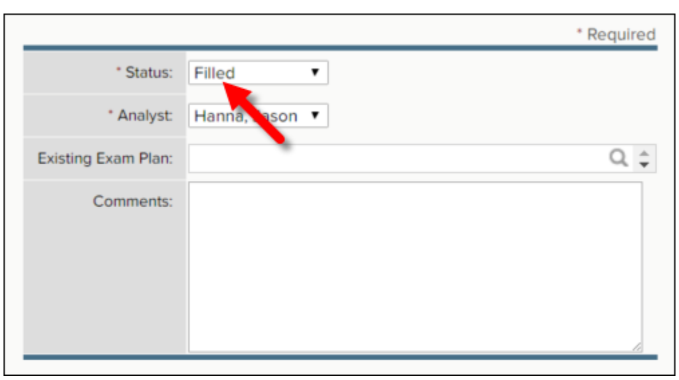
5. An approval confirmation will display.



6. Now it's time to change the requisition's status from open to filled. Return to your exam plan. Click the exam number **My HR** page, or on the **Jobs** menu, click **Exam Plans** and then click the **job title** from the **Exam Plan** column.

7. From the **Requisitions** section, click **Authorize** from.

8. Select **Filled** from the **Status** pulldown.

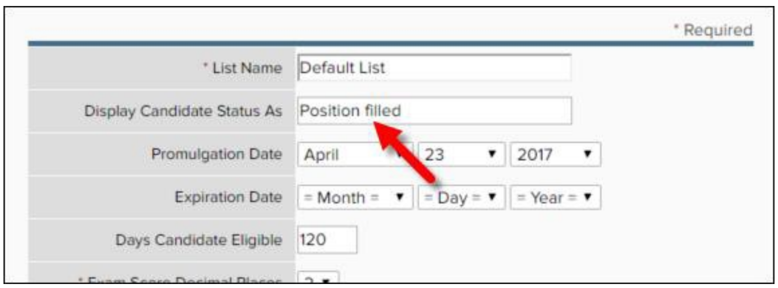


9. Once you've finished, click **Save**.

Note: The last few steps involve updating the candidate status messages for both eligible and referred lists. These steps can be omitted if you did not input status messages during the posting process.

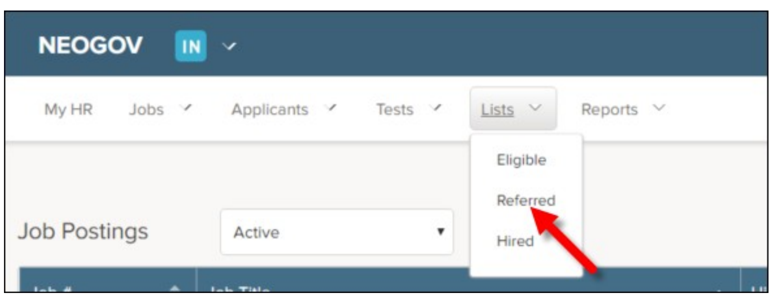
10. From the **Eligible Lists** section, click **Edit**.

11. Change the **Display Candidate Status As** field value to, "Position filled," or something similar.

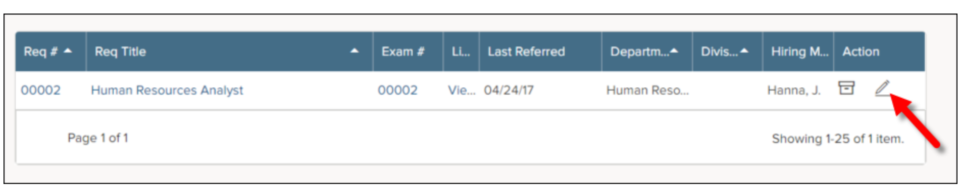


12. Once you've finished, click **Save**.

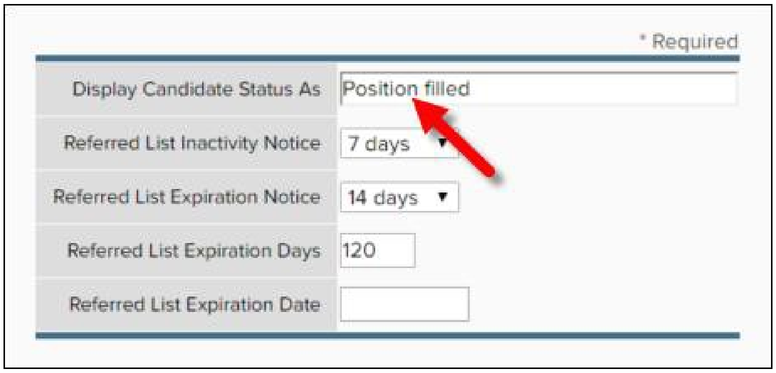
13. Now update the same field for the referred list by clicking **Referred** on the **Lists** menu.



14. From the **Action** column, click the **Edit** icon. It looks like a pencil.



15. Change the **Display Candidate Status As** field value to, “Position filled,” or something similar.



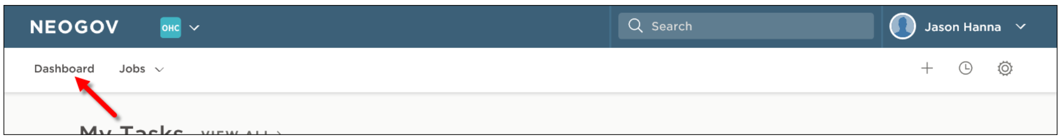
16. Once finished, click **Save**.

Print Applications

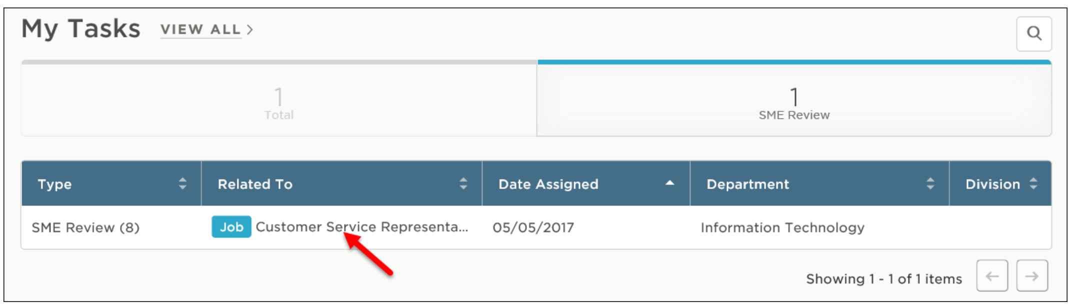
Users with the OHC roles of SME, Rater, Hiring Manager or HR Liaison can print applications from the OHC.

Steps to Print Applications

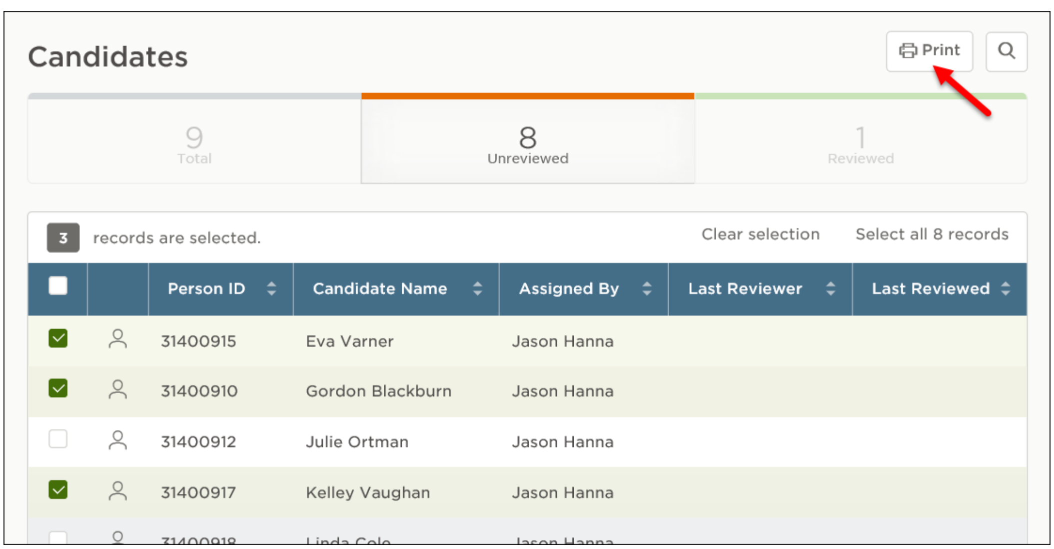
1. If you're not already viewing your dashboard page, click **Dashboard** in the upper left corner.



2. If you're assigned the OHC role of ***SME or Rater***, go to the listing of candidates.



3. Select the candidates for which you need printed applications and click **Print**.



4. Alternatively, if you're assigned the OHC role of ***Hiring Manager or HR Liaison***, go to the referred

list of candidates.

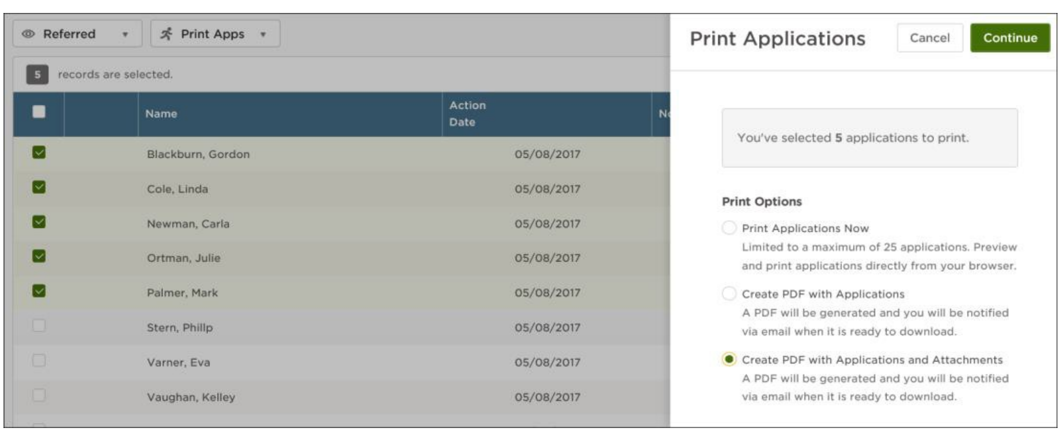
5. Select the candidates for which you need printed applications.

6. On the **Actions** menu, click **Print Apps**.

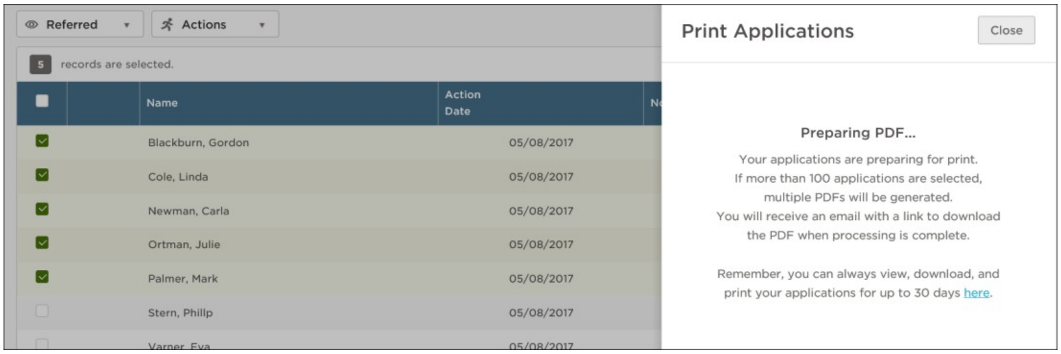
7. The Print Applications window will display. You have three options from which to choose:

- Print Applications Now: Limited to 25 applications and requires a direct print from your web browser.
- Create PDF with Applications: Creates a PDF of applications without candidates' uploaded attachments.
- Create PDF with Applications and Attachments: Creates a PDF of applications with candidate's uploaded attachments (e.g., résumés, cover letters, college transcripts).

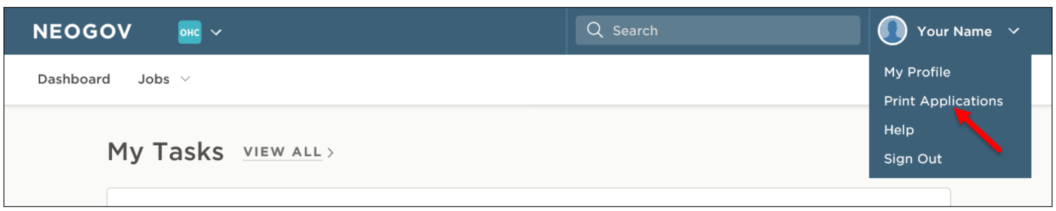
Select your preferred printing option and click **Continue**.



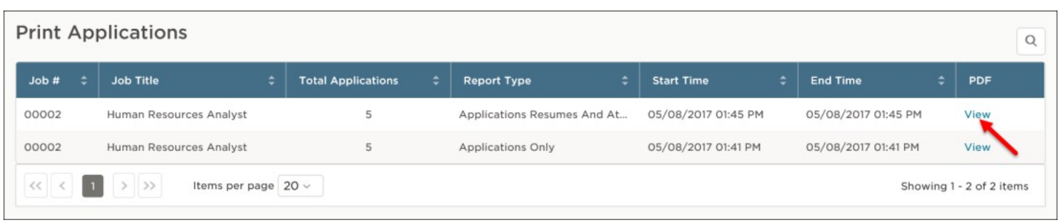
8. If you selected either PDF download option, a confirmation window will display. You'll receive an email from support@neogov.com once your PDF is ready for download.

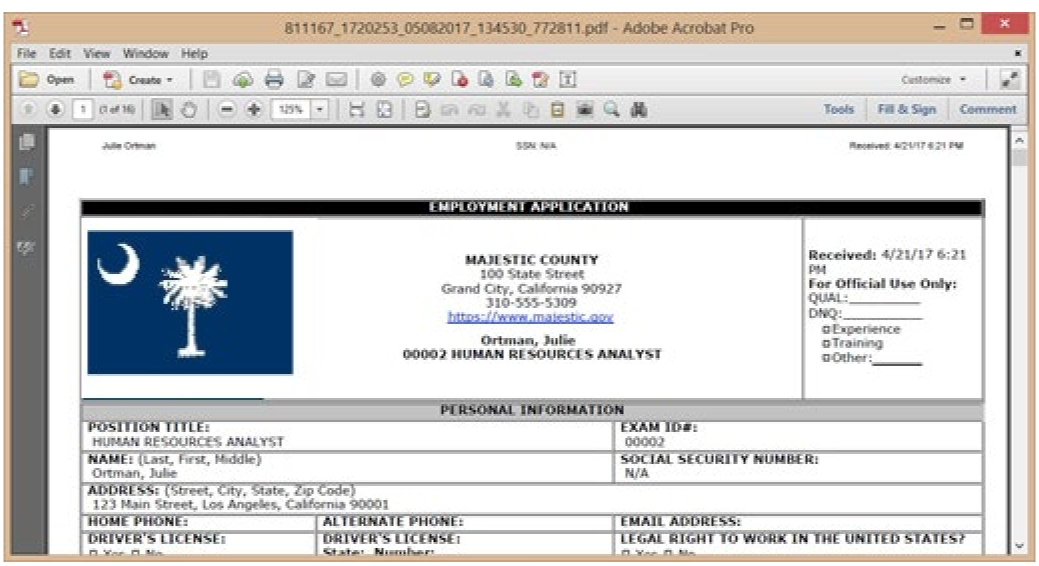


9. Go to your saved PDF. On the **Profile** menu, click **Print Applications**.



10. From the **PDF column**, click **View** for the saved PDF you want to download and/or print.





Advanced Filtering

Filters allow Insight users to specify criteria and receive a listing of applicants who meet the specified criteria. Criteria used for filtering can consist of basic filter criteria from the standard application questions; agency-wide questions, job specific supplemental questions, application received date, online/paper application, notification preference, or score.

Filters are divided up into two major categories: Evaluation Step Filters and Eligible List Filters.

Evaluation Step Filters

Evaluation Step Filters are those filters you use to search for candidates while they are within your Exam Plan's Evaluation Steps. These filters can be as simple or complex as you need and can span across multiple search elements.

Search elements for Evaluation Step Filters include:

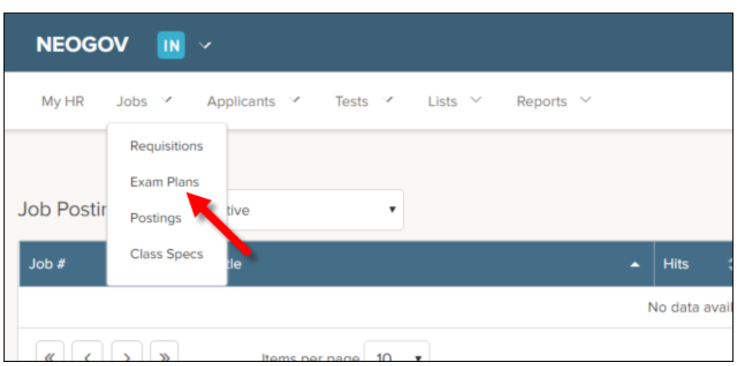
- Applicant Master Profile
- Application
- Agency-Wide Questions
- [Job-Specific] Supplemental Questions
- Applicant Step

Create and Apply an Evaluation Step Filter

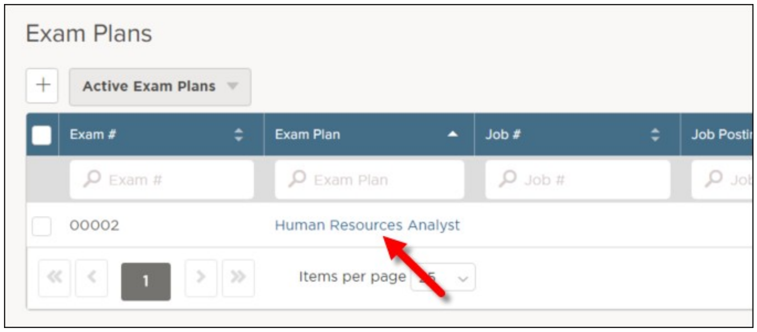
You have one of two paths to add an Evaluation Step Filter. You can create an evaluation step filter from the exam plan or the View Applicants by Step when working with the candidate records.

Create an Evaluation Step Filter from the Exam Plan

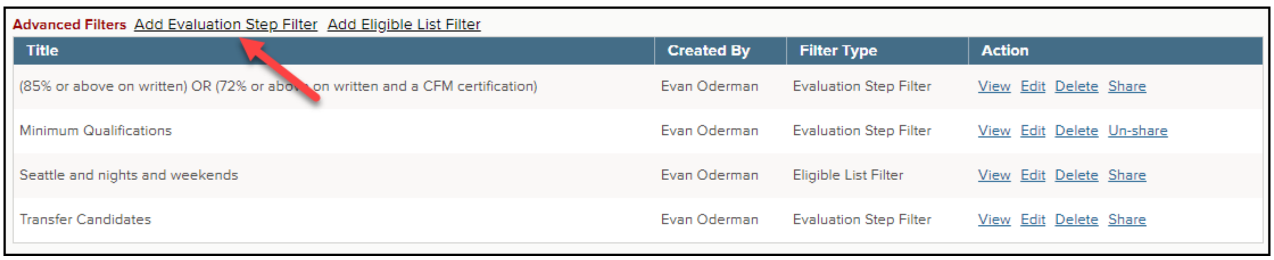
1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.



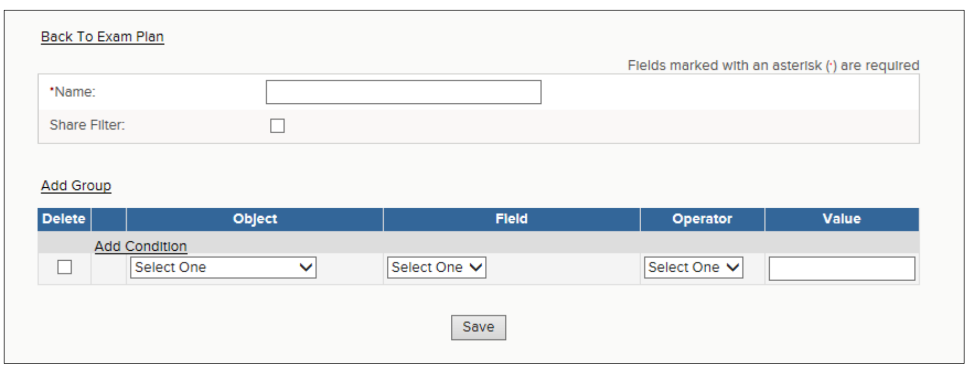
2. From the **Exam Plan** column, click **the job title.**



3. The **Exam Plan Detail** page is displayed. Select the **Add Evaluation Step Filter** link



4. The **Add/Edit Filter** page will display.



5. Complete the form using the table below.

* Required

Field	What to Enter
* Name	Input a descriptive name.
Share Filter	Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans.
Object	Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled.
Field	Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected.
Operator	Select the function that yields the records that you're expecting to see. • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result. • Equal (=) – Where result is an exact match. • Equal Field (=) - *Not in use at this time.* • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – *Not in use at this time.*
Value	Input the field value for which you're basing your search.

6. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.

7. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

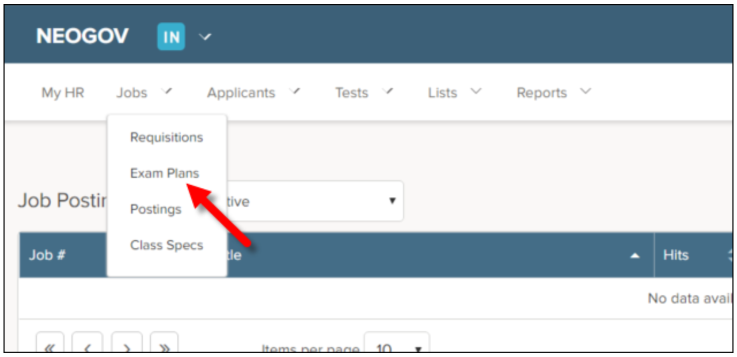
Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

8. Once you have completed your entire filter statement, click **Save**.

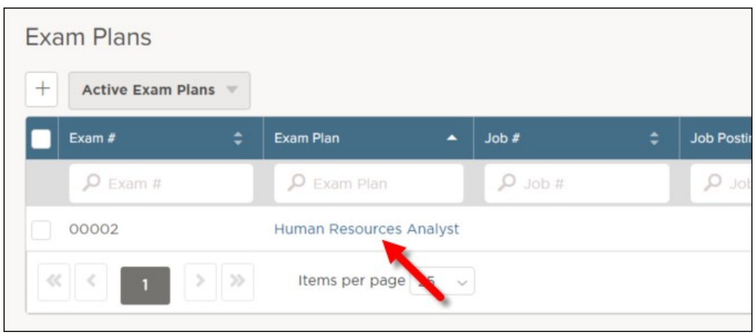
9. You will return to the **Exam Plan Detail** page. To apply the filter, select the **View Applicants by Step** link and follow steps 4 and 5 in the *Create an Evaluation Step from the View Applicants by Step Page* section below.

Create an Evaluation Step from the View Applicants by Step Page

1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.

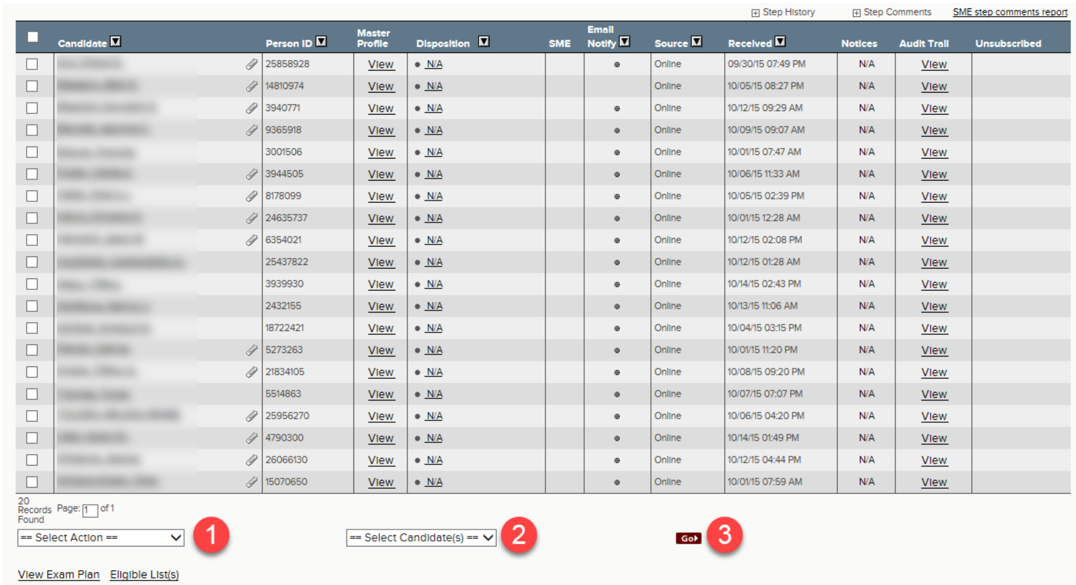


2. From the **Exam Plan** column, click **the job title.**



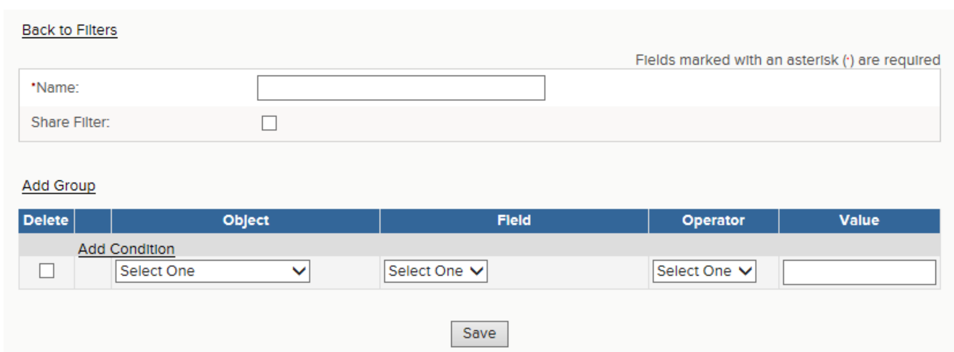
3. Select the **View Applicants by Step** link.

4. From the **View Applicants by Step** page, select **Advanced Filter** from the **Select Action** drop down, choose candidates(s) from the **Select Candidates(s)** drop down, and click **Go**.



5. On the Advanced filters page, click **Add Filter** to create a new filter.

6. The **Add/Edit Filter** page will display.



7. Complete the form using the table below.

* Required

Field	What to Enter
* Name	Input a descriptive name.
Share Filter	Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans.
Object	Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled.
Field	Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected.
Operator	Select the function that yields the records that you're expecting to see. • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result • Equal (=) – Where result is an exact match. • Equal Field (=) - *Not in use at this time.* • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – *Not in use at this time.*
Value	Input the field value for which you're basing your search.

Note: You can apply an existing filter to the evaluation step by choosing the **Apply** link for the filter.

8. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.

9. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

10. Once you have completed your entire filter statement, click **Save**.

11. Upon saving, you are returned to the **Advanced Filters** page, which allows you to apply, view or edit your Evaluation Step filter; click **Apply**.

12. Your filter will be applied, and **THIS STEP IS FILTERED** will appear on the **View Applicants by Step** page.

Eligible List Filters

Once some candidates move through your evaluation steps and on to the eligible list, Eligible List Filters can then be utilized. Because Evaluation Step Filters and Eligible List filters share the same setup tool, the process to create these two types of filters is exactly the same. Like Evaluation Step Filters, Eligible List Filters can be as simple or complex as you need and can span across multiple search elements.

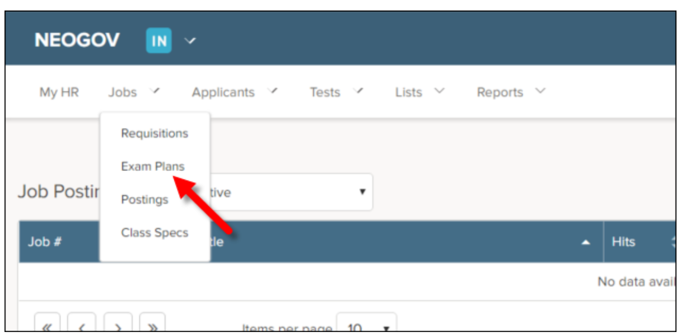
Search elements for Eligible List Filters include:

- Applicant Master Profile
- Application
- Agency-Wide Questions
- [Job-Specific] Supplemental Questions

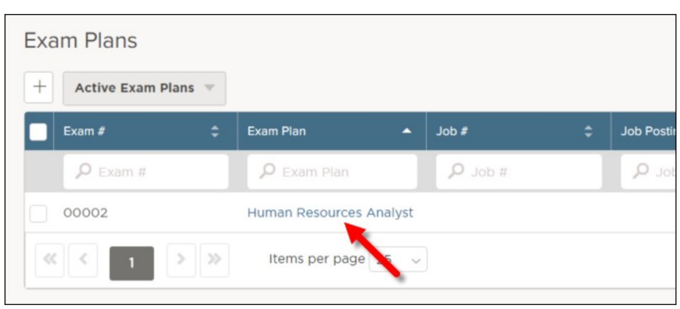
You have one of two paths to add an Eligible List Filter: from the Eligible Candidates page, while you're working with the candidate records, or from the Exam Plan Detail page, the main page for your Exam Plan record. Both paths lead to the final outcome of creating a new eligible list filter.

<u>Create an Eligible List Filter from the Eligible Candidates Page</u>

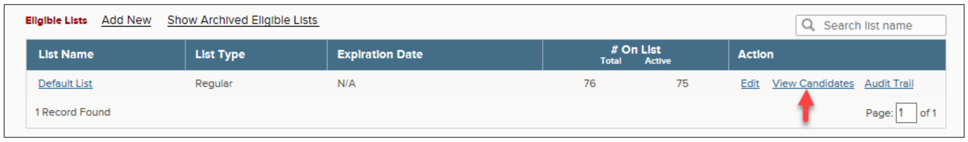
1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.



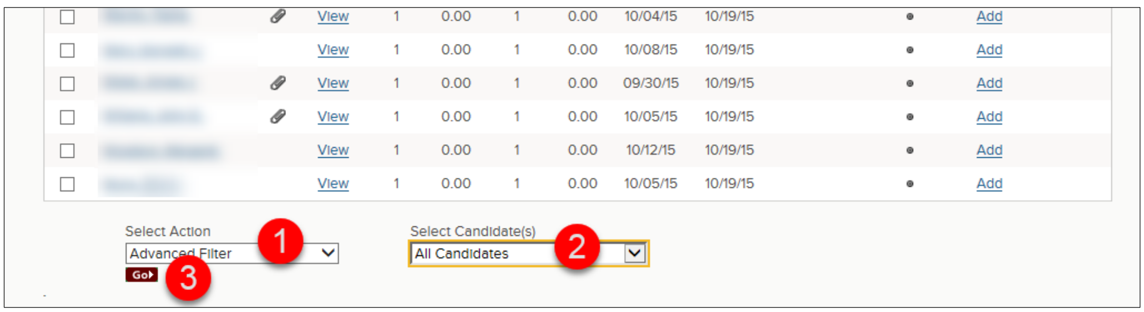
2. From the **Exam Plan** column, click **the job title.**



3. From the **Exam Plan Detail** page, **Eligible Lists** section, click **View Candidates** for an eligible list containing candidate records that require some type of filtering.



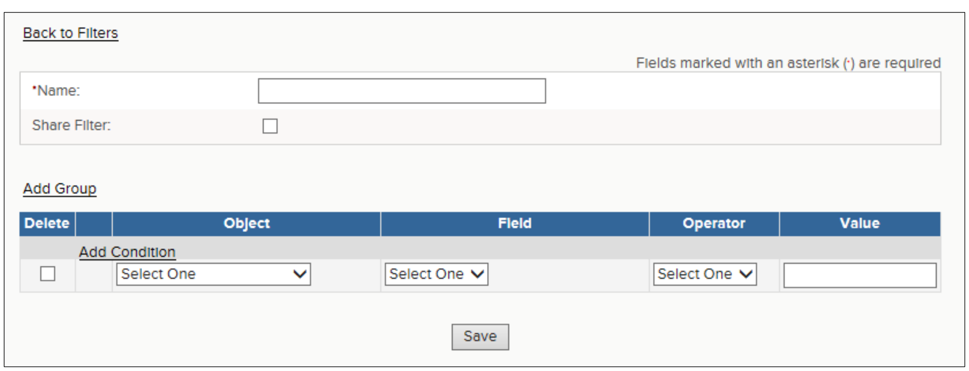
4. On the **Eligible Candidates** page, from the **Select Action** drop down, select **Advanced Filter** and from the **Select Candidate(s)** drop-down field, select the applicable candidate value to apply your filter (e.g., All Candidates) and click **Go**.



tip From here to the point of saving your eligible list filter, it is the same process as creating the evaluation step filter.

5. On the Advanced filters page, click **Add Filter** to create a new filter.

6. The **Add/Edit Filter** page will display.



7. Complete the form using the table below.

* Required

Field	What to Enter
* Name	Input a descriptive name.
Share Filter	Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans.
Object	Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled.
Field	Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected.
Operator	Select the function that yields the records that you're expecting to see. • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result. • Equal (=) – Where result is an exact match. • Equal Field (=) - *Not in use at this time.* • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – *Not in use at this time.*
Value	Input the field value for which you're basing your search.

Note: You can apply an existing filter to the evaluation step by choosing the **Apply** link for the filter.

8. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.

9. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

10. Once you have completed your entire filter statement, click **Save**.

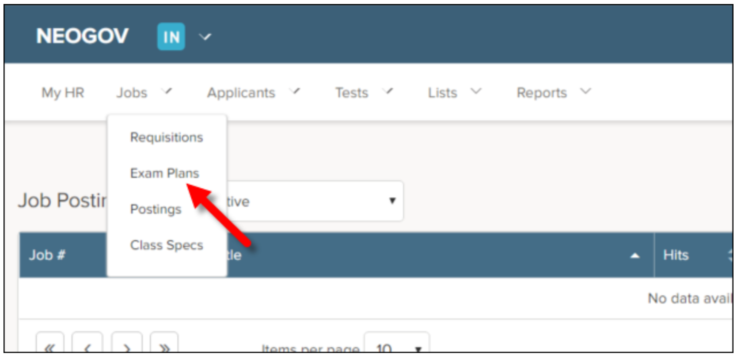
11. Upon saving, you are returned to the **Advanced Filters** page, which allows you to apply, view or edit your eligible list filter; click **Apply**.

12. Your filter will be applied, and **Filter returned X records** will appear on the **Eligible Candidates** page.

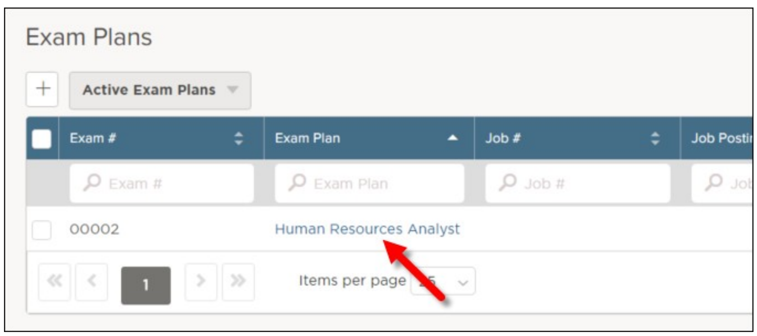
Note: After your candidate records are filtered, you're free to carry on with other tasks, e.g., reactive candidates, apply preference points, send notices, etc.

Create an Eligible List Filter from the Exam Plan Detail Page

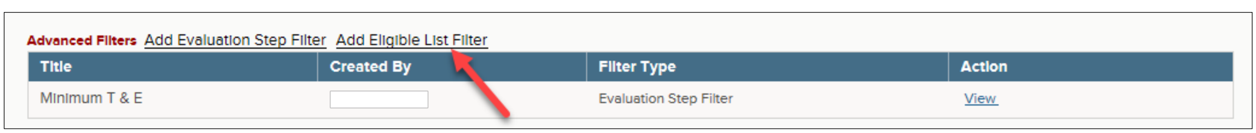
1. Access the exam plan in Insight by selecting the **Jobs** menu and clicking **Exam Plans**.



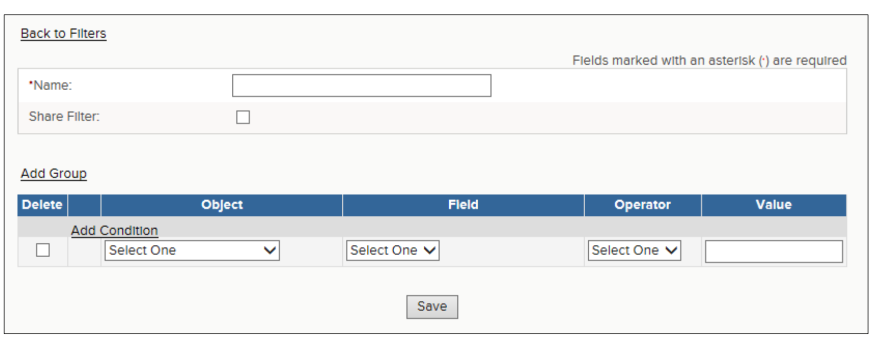
2. From the **Exam Plan** column, click **the job title.**



3. The **Exam Plan Detail** page is displayed. Select the **Add Eligible List Filter** in the **Advanced Filters** section.



4. The **Add/Edit Filter** page will display.



5. Complete the form using the table below.

* Required

Field	What to Enter
* Name	Input a descriptive name.
Share Filter	Click to place a check mark in the box if you wish to share your filter. Sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans.
Object	Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions to specify from where the data will be pulled.
Field	Select the field on which your search condition will be based. You will see applicable fields depending on which Object you have selected.
Operator	Select the function that yields the records that you're expecting to see. • Begins with – Where values that start with a specific string of text are found in result. • Contains (IN) – Where any value selected is found in result. • Contains All – Where all values selected are found in result. • Does Not Contain (Not IN) – Where value specified is not included in result. • Equal (=) – Where result is an exact match. • Equal Field (=) - *Not in use at this time.* • Not Equal (<>) - Where value is not found in result. • Not Equal Field (<>) – *Not in use at this time.*
Value	Input the field value for which you're basing your search.

6. If your filter only contains one search condition, click **Save**; however, if you would like to refine your search, add additional condition lines by click **Add Condition**.

7. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

Note: If your filter is advanced and requires combining AND and OR condition lines, then click **Add Group**.

8. Once you have completed your entire filter statement, click **Save**.

9. Upon saving, you're returned to the **Exam Plan Detail** page, which allows you to view, edit, delete or share your eligible list filter.

tip You can only apply your saved eligible list filter from the **Eligible Candidates** page. You cannot apply the filter from the **Exam Plan Detail** page. To access the **Eligible Candidates** page, click **View Candidates** from the **Exam Plan Detail** page in the **Eligible Lists** section.