Contents

Introduction .................................................................................................................................................. 2
Getting Started ........................................................................................................................................... 2
System Overview and Functionality ........................................................................................................... 3
  Home page and navigation ........................................................................................................................ 3
  Resources .................................................................................................................................................. 4
Recruiting Process ..................................................................................................................................... 5
  Step 1: Clone an Opportunity ................................................................................................................... 6
  Step 2: Post the Job ................................................................................................................................... 11
  Step 3: Candidates Apply ......................................................................................................................... 14
  Step 4: Review Applications .................................................................................................................... 15
  Step 5: Hire .............................................................................................................................................. 20
  Step 6: Close ............................................................................................................................................. 23
Contact Support ......................................................................................................................................... 24
**Introduction**

Recruiting solution in UltiPro puts candidates first by making the application process simple, personal and fun. This helps you to begin cultivating successful, long-term relationships from the very first point of interaction – recruitment.

This training guide is designed to equip you with the fundamental steps of recruiting right from creating an opportunity to hiring a candidate.

**Getting Started**

1. Log in to the portal using the link below: https://e42.ultipro.com

2. Enter your username and password.

First time login: **Username**: Your employee number

**Password**: Your birth date (MMDDYEAR) E.g. 12021971

You will be prompted to change your password. Save your new password for future login.

You can also click on ‘Forgot Password’ to reset your password.
System Overview and Functionality

Home page and navigation

Once you log in you will see the home screen. You can make changes and display the functions you want to see.

Click on the drop down of the ‘Menu’ icon on the top left corner to access more functions.

You can create your own menu based on your function preferences.

Click on ‘Myself’ to access your functions as an associate.

Click on ‘Administration’ to access all the functions for the employees at the platform.

Watch – UltiPro Navigation Overview to learn more:

http://quicktours.ultimatesoftware.com/ultipro/navigation_overview/index.html
Resources

There are supporting documents for Recruiting module in UltiPro. On your recruiting gateway page, click on ‘Help’ to access all the user guides for each of the topics in recruiting.

Let’s look at your role in detail in order to successfully perform recruiting process in Ultipro.
Recruiting in UltiPro, the process begins by cloning an opportunity. An opportunity is a requisition or job opening that you are looking to fill.

Once the opportunity is posted, candidates will begin to apply.

You can review application information in real-time, including candidate details, documents, answers to application questions, references, and more.

If you decide not to hire for a specific opportunity, you will close the opportunity.

Hiring a candidate marks the application as hired and sends the candidate information to UltiPro Onboarding.

Once the opportunity is filled, it will close automatically.

Let’s go through each of these steps in detail.
Step 1: Clone an Opportunity

As a hiring manager, you will first need to clone a position in Ultipro.

**Navigation:** Menu icon → Administration → Recruiting Gateway

Click on Opportunities → Closed. Select a job you want to post by searching it in the search bar based on the platform.

Job opportunities will already be created for you based on your platform. You DO NOT need to create new opportunities. You will simply select the job opportunity for the position you are looking to post and clone it.

Once the clone option is enabled, click on it.

Learning & Development 6

2018
Go through each of the steps below to publish a job.

1. **Opportunity Information:** Everything on this page will pre-populate based on the job title. There is **no action** required here. Review all the information and click ‘Continue’.

Make sure you remove the word ‘Template’ before publishing the opportunity.
2. **Opening Information** - Enter the information for Budgeted FTE or select Full-time Equivalent if you have an evergreen position.

   - **Budgeted FTE**: The budgeted FTE requires you to enter the number of candidates that will be hired on the specific requisition.
   - **Incumbent**: Incumbent is not required but recommended to enter employees information and last day worked.

   - **Continuous Opening (Evergreen)**: Evergreen postings do not close and refresh automatically every 30 days

   - **Update the reason for opening and incumbent for backfill.**

3. **Screening** - **No action** required here. Skip this section and click ‘Continue’.

4. **Company Information** - **No action** required here. This will be default based on your platform. Verify the information and click ‘Continue’.
5. Compensation - Modify the fields on this page based on your platform. Click 'Continue' once done.

- Choose the status.
- Rate of your platform for a position may vary.
- It is not recommended to display compensation ranges on job boards.
6. Recruiting Process –

You can also share the opportunity. You can preview all the information and click ‘Save and Publish’ when you are ready to post.

Please select owner of requisition here.

Select the person who is responsible for making the hiring decision at your platform.

Depending on your platform, select the appropriate person who will handle onboarding process and manage ongoing employee data.

You can share an opportunity with individuals on your team that is needed.
Step 2: Post the Job

Once you ‘Save and Publish’ a job, click on ‘Job Board Postings’ to select the job board(s) where you want the job to be published.

Select ‘Post’ on eQuest to post the opportunity on external job boards like Indeed, Glassdoor and Zip recruiter.
Select the appropriate function based on the job opportunity.

Select the Industry.
Select the external job board you want to post the opportunity on and complete the process. Make use of the ‘Advantage Network’ as it is free.

Once you have posted the job opportunity, you will find it in ‘Published’ section.
Step 3: Candidates Apply

As the candidates are applying, you will see it in ‘Published’ section. Click on the number of applicants to review them.

- **All** - View all opportunities linked to your platform.
- **Shared** - View all opportunities linked to your profile.
- **Mine** - View all opportunities that you published.
Step 4: Review Applications

You can review application information in real-time, including candidate details, documents, answers to application questions, references, and more.

- Once you review the presence, move the application to the next step.
- An automatic form letter is sent to candidates who are declined.

Once you click on the number of applicants, select the candidate you want to review.

You can also click on the three dots icon and access different options from here.
You can view the attached resume of the candidates here.

If you want to move the candidate to the next step, click on ‘Disposition’. For each candidate, you need to move through each recruiting step.

1. **Phone Screen**: If you like the candidate, you can move the candidate to the next step ‘Phone Screen’.
Click on ‘More Actions’ → You can send email or schedule meeting with the selected candidate.

You can review at which stage each candidate is at. You want to keep candidates in your requisition up to date in UltiPro with the stage they are in the recruiting process.

2. **Interview**- Once the candidate is selected from phone screen, you move the candidate to the next step ‘Interview’.

3. **Job offer extended**- Move the candidate to Job offer extended in UltiPro. Follow the process currently in place at your platform to extend the offer to the candidate.

4. **Background Screen**- Once we have a signed accepted offer, you move the candidate in UltiPro to background screening.
Recruiting User Guide (Hiring Managers)

Go back to the applicant and click on the three dots. Select ‘Request Background Check’.

Select the package based on the position from the drop down and click ‘Submit’.

You can review the status of the background check processing in the candidate’s profile.

You will know your BG Check was initiated when the “BG Check Tab” generates in the candidates profile. Below, you will see that FIRST status of the BG will be “candidate pending.” This is because the candidate needs to complete their electronic Background Consent form.

If the candidate does not complete the electronic BG Consent form, the BG Check process will remain stagnant.
Once, the BGC Form is completed, the background will show as In Progress.

Once the BG is completed AND you’ve received notification via email of that the background check has been passed. You may move that candidate to HIRE.

**Note:** Just because the background check status says “Completed” that does not mean the candidate’s background check has PASSED. Once you receive the email notification that the candidate has passed the background check, you can move the candidate to ‘Hire’.

You will not be able to proceed to ‘Hire’ stage unless the background screening process is complete.

**Note:** At any step, you can click ‘Decline if the candidate is not eligible for Hire. Choose a reason for the decline.
Step 5: Hire

Hiring a candidate marks the application as hired and sends the candidate information to UltiPro.

You can hire one or multiple candidates per opportunity.

Hiring a candidate does not automatically decline other candidates or close the opportunity.

To hire a candidate, move the candidate to the Hire step.

Once you have reviewed the background check results received, acknowledge by clicking the check box before moving the candidate to hire.
Once you hire the candidate, you can view the hire details. Review all the information. You can make changes to the start date or the salary rate as needed.

Confirm or enter the hire details, then select Hire. You can save the hire as a draft and complete it later.
You can continue hiring process for your pending candidates by clicking on the number of applicants.

Click on the number of applicants to continue hiring process for your pending candidates.
Step 6: Close

Once you hire a candidate, the opportunity is closed automatically if the budgeted FTE has been met.

In case you want to close an opportunity for a position at any time, select the position and click ‘Close’.

Choose the reason for closing an opportunity.
Contact Support

Please reach out to HR.Help@paradies-na.com