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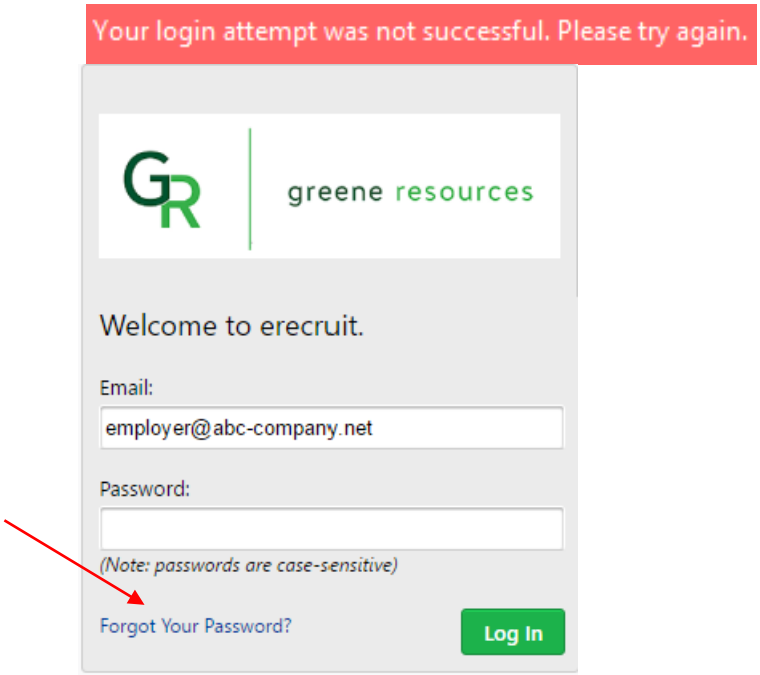
Recruiting Vendor Overview on How to Use Erecruit

Logging In

- Open a compatible browser: Chrome, Firefox, or Safari. Please do not use Internet Explorer as it is not fully compatible.
- Go to erecruit.greeneresources.com.
- Enter your email and password. You should receive your password via email. If you have questions regarding your login credentials, please reach out to your Greene Resources representative.

Password Assistance:

- If you have forgotten your password, click “Forgot Your Password?” and you will receive the password via email.



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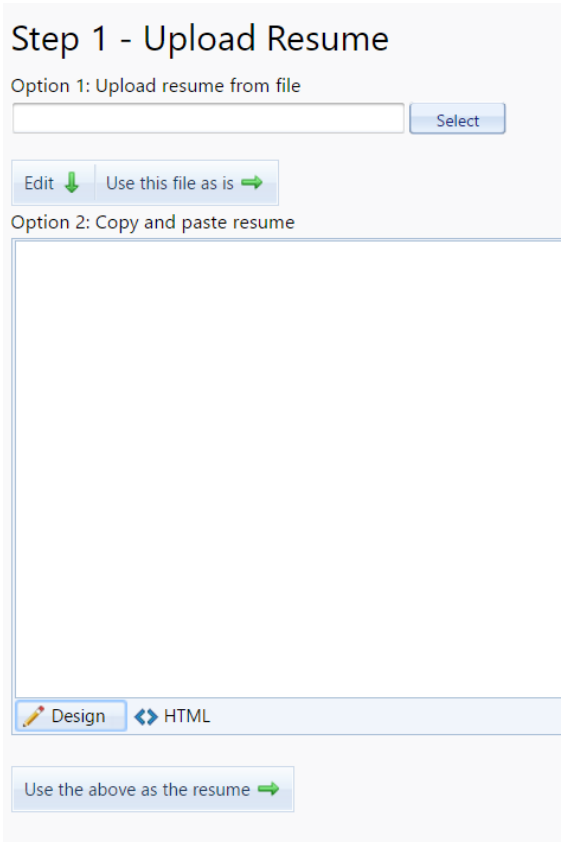
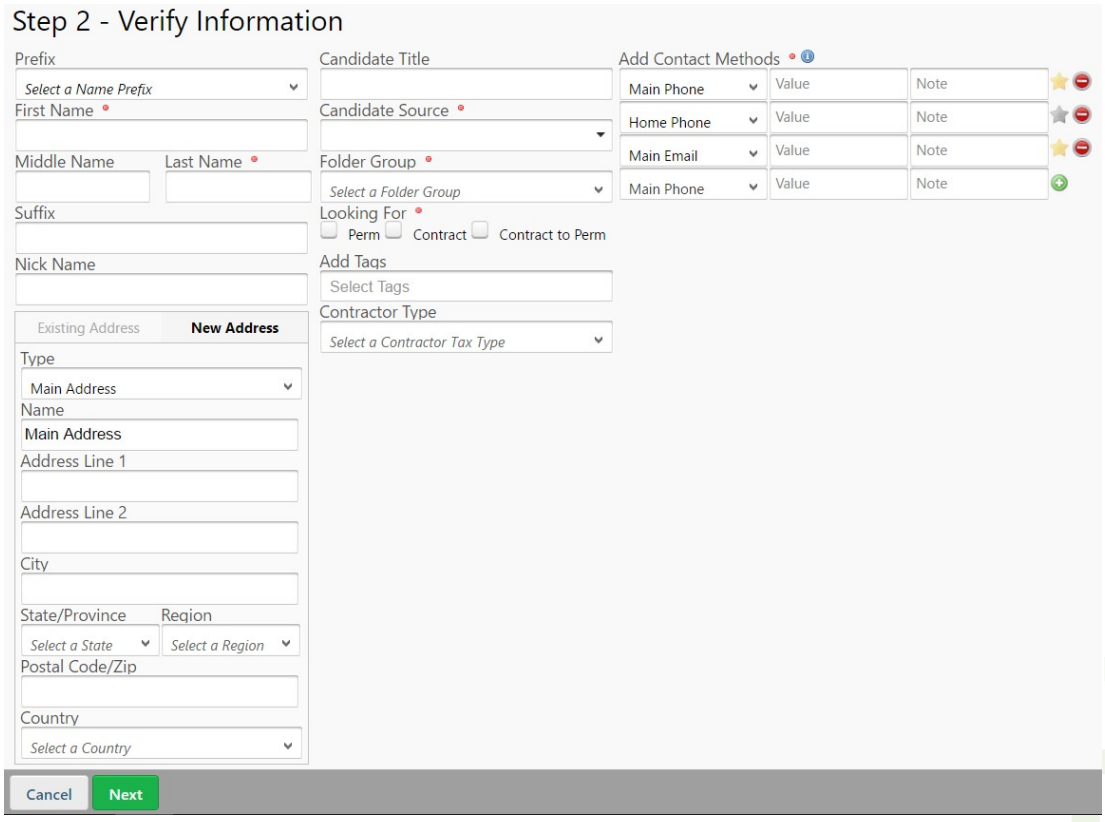
Creating a Candidate Record

- Click on the **Greene Resources Logo** in the top left corner. A dropdown menu will appear.
- Under “Add New” select Candidates.
    - You can either click on “Candidate” to add a candidate with a resume, or click “Without Resume” to continue without one

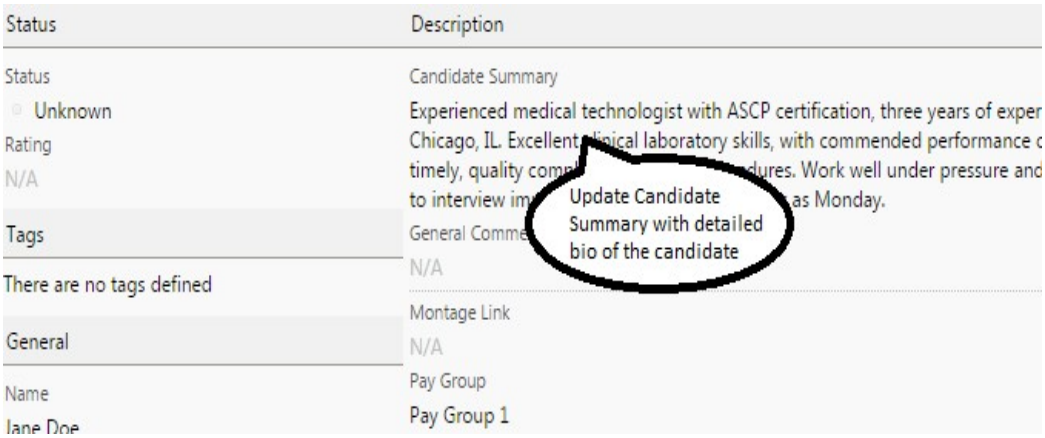
- If you choose to add a candidate with a resume, a new screen “Step 1 – Upload Resume” will open. Select **Option 1: Upload Resume from File** or **Option 2: Copy and Paste Resume**.



- **Option 1: Upload Resume From File**: Click **Select**. The system will prompt the vendor to select a document from their server or computer. Once the file has been identified the vendor should click **Open**.
    - If changes need to be made to the document click **Edit**. The document will appear in the editable text box below to allow changes to be made. A tool bar will appear above the text box to assist in editing and formatting. Once all changes are completed click **Use the above as the resume**.
    - If no changes need to be made click **Use this file as is**.
- **Option 2:** A resume can be added, edited, and formatted in the **"Copy and Paste Resume"** field. Once a resume has been entered, a tool bar will appear above the text box to assist in editing and formatting. Once the resume is complete click **Use the above as the resume** at the bottom of the screen.
- After you finish uploading the resume, or if you click "**Without Resume**", a new screen "**Step 2 – Verify Information**" will open with editable fields. If you uploaded a resume, the system will automatically extract information from the candidate resume and populate fields on the screen. Please review the information for accuracy. If you did not upload a resume, please enter this information now.



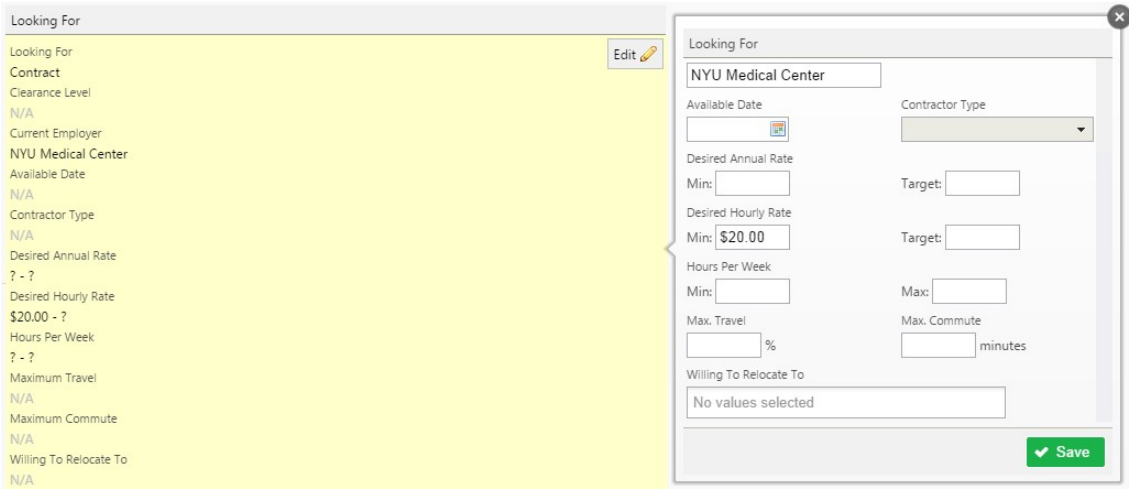
- Click **Cancel** to stop the creation of a new candidate record and close the screen. Click **Next** to create a permanent candidate record in the system.
- A new **"Candidate Record"** screen will open. The system will automatically generate information from the resume to create a **"Candidate Summary"** located in the center of the screen. Please replace and update with candidate bio.



- Please ensure the following fields are populated on the **"Candidate"** tab. To edit any fields on the Candidate tab hover the mouse over the data that needs to be changed and the system will highlight it and an edit icon will appear. Click the **"Edit"** icon and the system will open a window for the data to be updated.
    - Contractor Type
    - Desired Annual Salary (Min) or Desired Hourly Pay (Min)

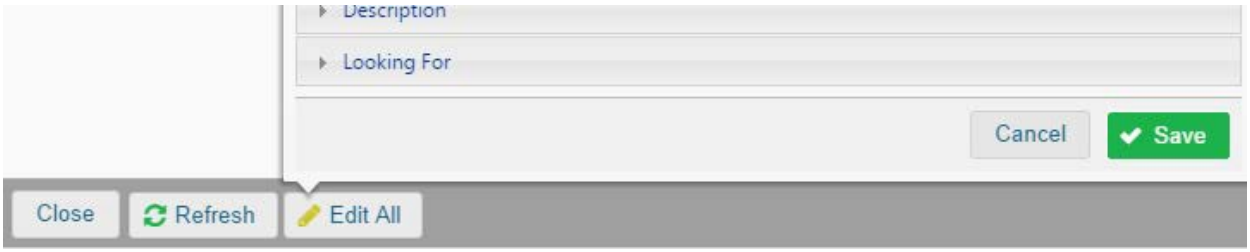
If these fields are not populated the candidate record will not allow the changes to be saved.

- If any of the information has been changed, click **"Save."**



- Click on the **"Attachments"** link on the righthand side to ensure the resume file is visible in the list.
- Click **Refresh** at the bottom of the window to ensure the candidate record reflects the current changes.

***Note**: If a candidate record needs to be updated in more than one place select "Edit All" at the bottom of the screen. The system will open a window that will allow the record to be updated in all areas without having to move to different tabs. There are also quick links on the far right of all tabs where contact information may be quickly updated.*



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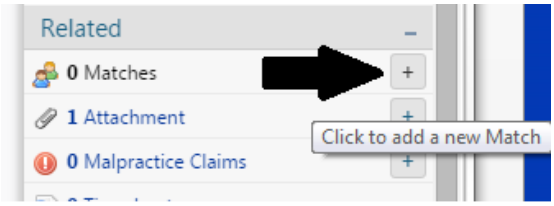
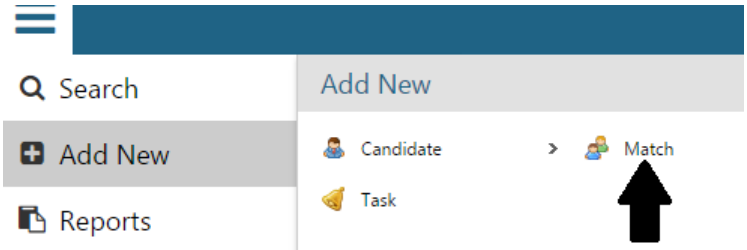
Submitting Candidates to Positions – Creating a Match

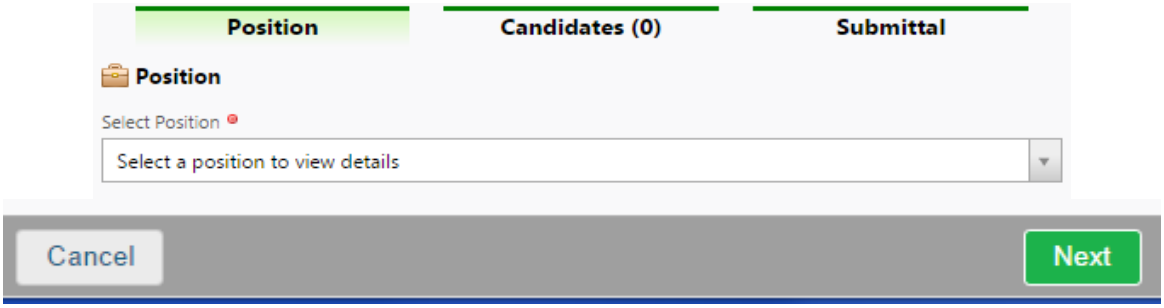
- Once a candidate is submitted to an open position the system creates a **"Match".** A match may be created from the homepage, the Candidate record or the Position records.
- If creating a match from the **Candidate** or **Position** records click on **"New Match"** on the righthand side of the page. Otherwise, follow the steps below.



- Click on the Greene Resources Logo in the top left corner. A dropdown menu will appear.
- Click on **"Add New"** and then click on **"Match"**; a new window will open.

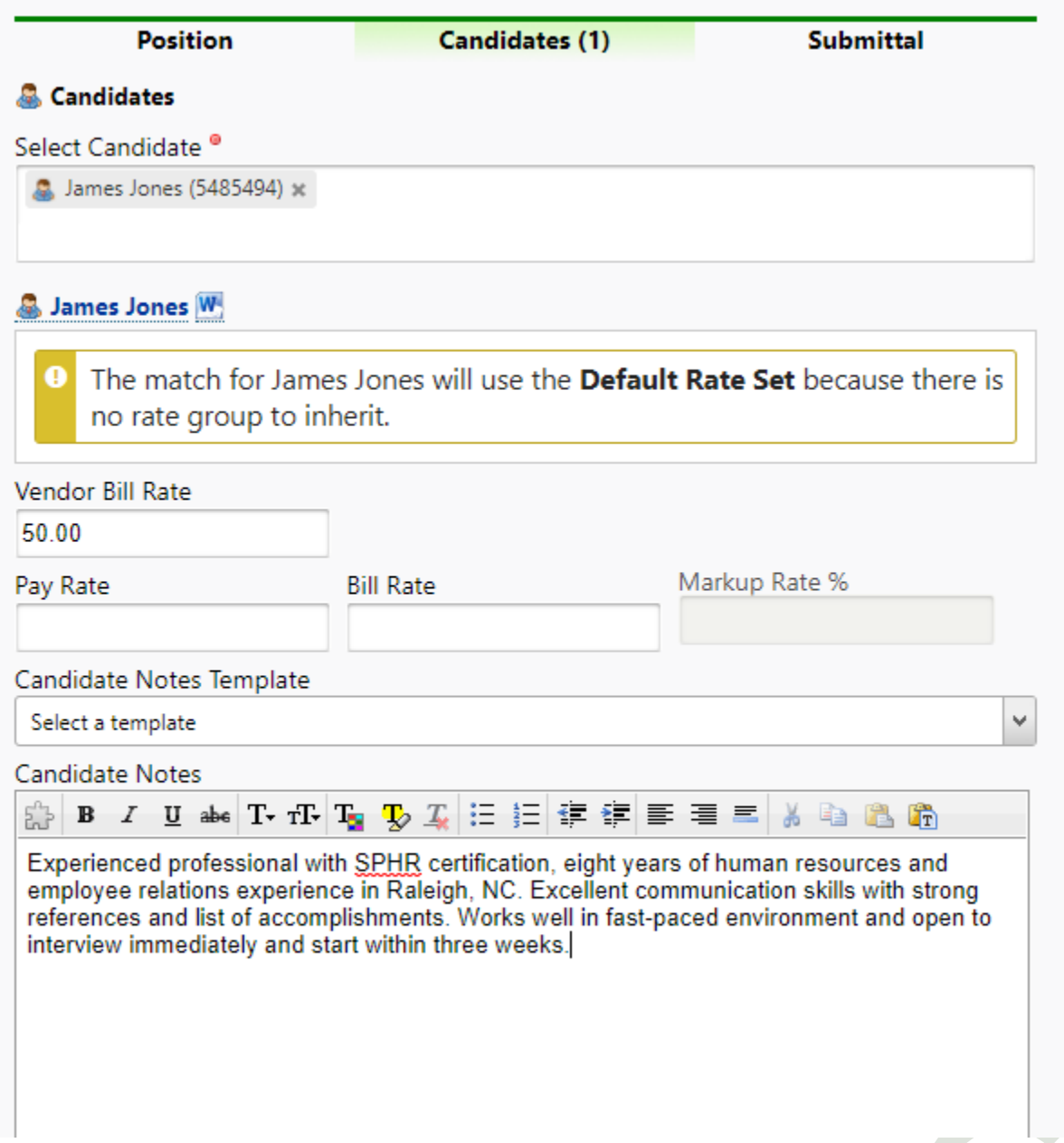


- A position can be selected by clicking on the **"Position"** drop down box and selecting a position title. Then click on **Next**.

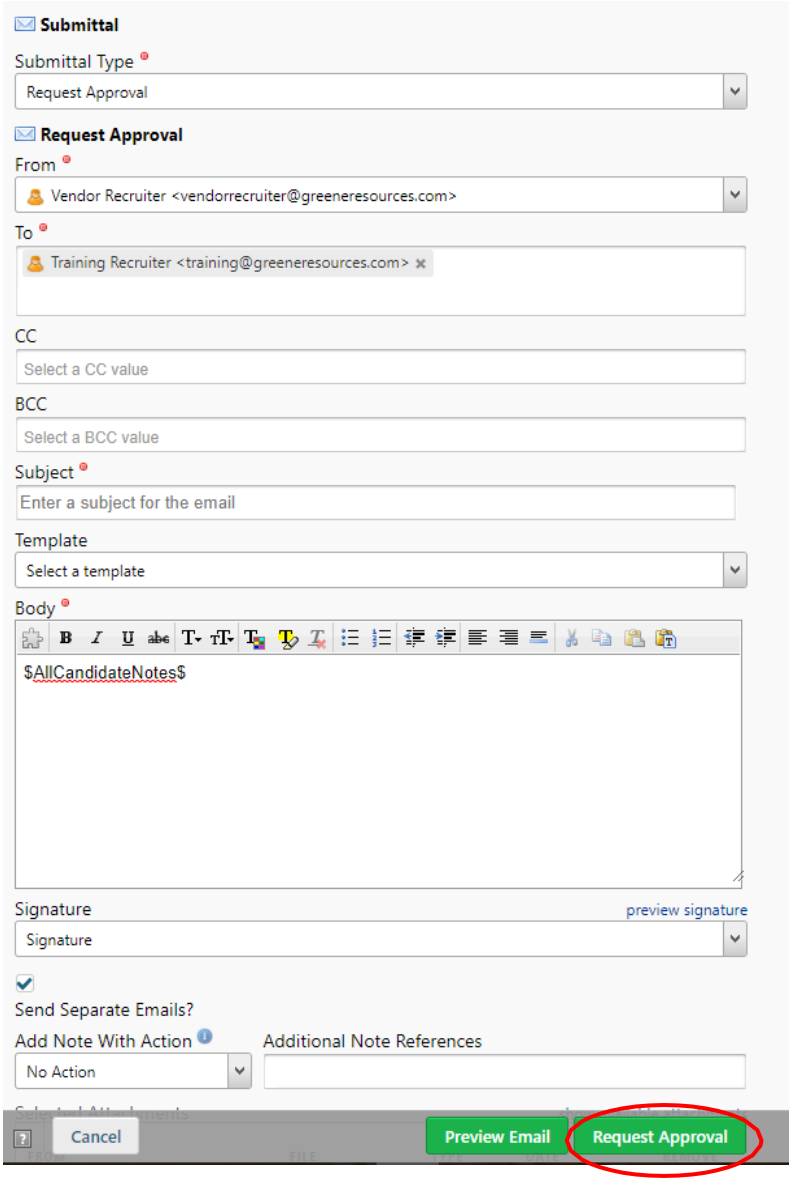


- To identify the right candidate for the match either type in the candidate's name or select a candidate by clicking on the **"Candidate"** drop down box. The name selected should appear in the list below. Once the candidate's name is confirmed in the list click **Next**.

- You must enter a vendor bill rate and under **"Candidate Notes"** copy and paste the bio that you created for the candidate in their **Candidate Summary**.



- A new window will appear in the form of an email to the appropriate Greene Resources Resource Administrator (RA). The candidate notes from the previous page will automatically be entered in the body of the email. Ensure the appropriate candidate, position and client references are visible under the body of the email.
    - Click **Request Approval** to send the match to the RA for review. An alert will pop up stating: “Your match has been successfully submitted. The Resource Administrator responsible for this position has been notified.” Click **Close**.
    - If at any point the match does not need to be created, click Cancel at the bottom of the window.



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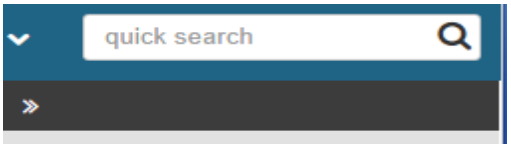
Updating a Candidate Record

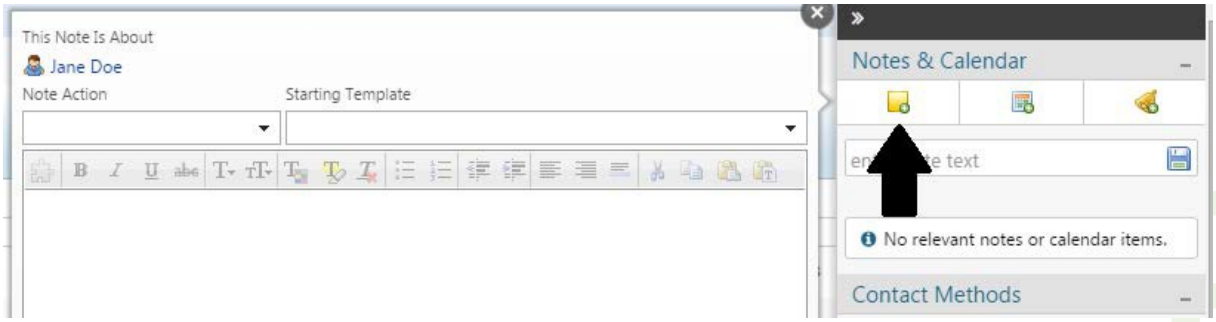
- To search for a candidate, locate the **Quick Search** box in the top right corner of your page. Type in the name of the candidate and hit **Enter**. A new window will appear reflecting any candidate records identified based on the search criteria.



- The system will bring up a complete list of candidate records that have been created by the user. Select the appropriate candidate by clicking on the **Candidate Name (Candidate ID).** A new window will open reflecting the candidate record.

Adding a Note

- Erecruit offers the option of entering a personalized note on the candidate record or the match.
- A note may be created by clicking on the **"Add Note"** icon under "Notes & Calendar" on the far-right column.
- The following fields may be populated:
    - Note Action – Select the reason for the note (Required)
    - Comment Box – Enter the message of the note (Required)
    - Click "**Save**" to register the note on the record.
    - A history of notes will be located on the **"Notes"** tab at the top of the screen.
    - All notes can be viewed by clicking on the **"Notes"** tab at the top of the screen. Historical note information will include: the date a note was added, author, action and the note text.
    - A note can only be deleted by the original author by clicking on the red minus sign on the right side of that notes row.



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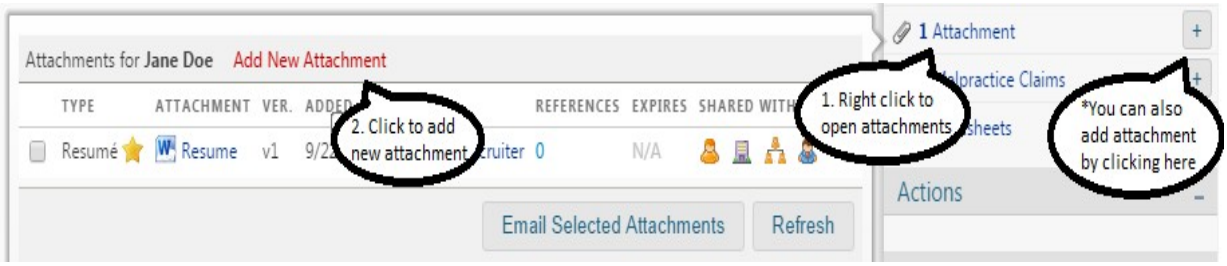
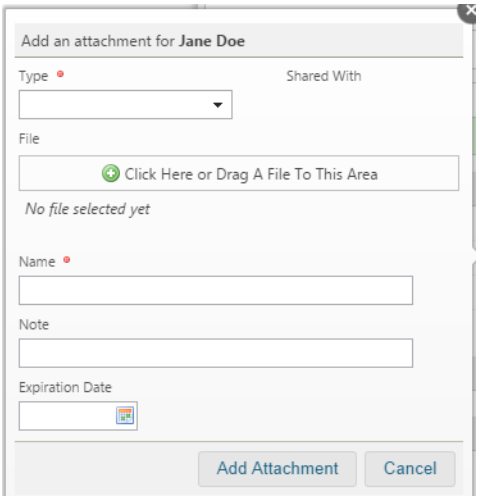
Compliance and Attachments

- Client required agreements and compliance results (i.e. background results) should be attached to the candidate record prior to the candidate starting a new assignment.
- First, search for the candidate using the **"Quick Search"** in the top right corner. Select the appropriate candidate. The candidate record will open.
- On the right-hand side of the page, you will see the "Attachments" tab. Click on the (+) next to attachments or right click the "Attachments" link to add a new attachment.



- A type can be selected by clicking on the **"Type"** drop down box and selecting a document type.
    - Populate the information for Name, Note and Expiration (as applicable).
    - Click on the green plus sign to add a document or drag a document to that field. The system will prompt the vendor to select a document. Once the file has been identified the vendor should click **Open**.
    - Click **Add Attachment**. The system will upload the file selected and reflect the new attachment in the list for the candidate.
    - At any point click **Cancel** if no attachment is necessary.



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Recruiting Vendors:
Reviewing Timesheets and Reporting

Logging In

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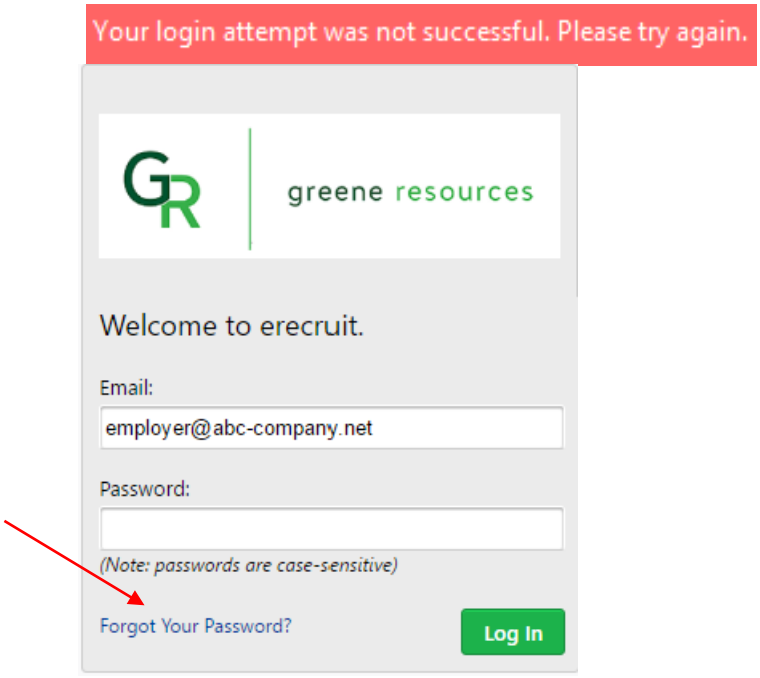

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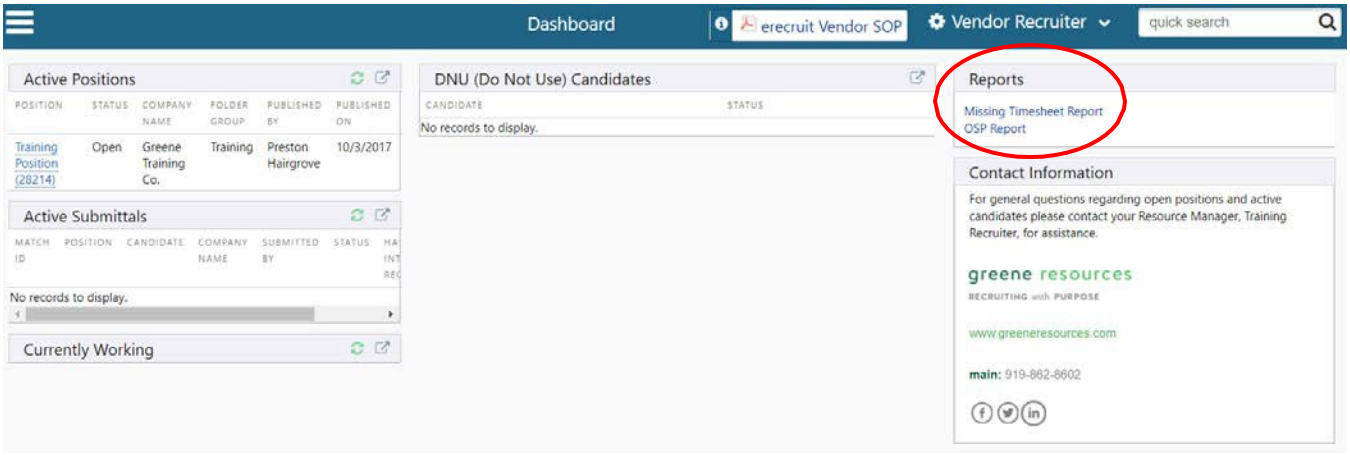
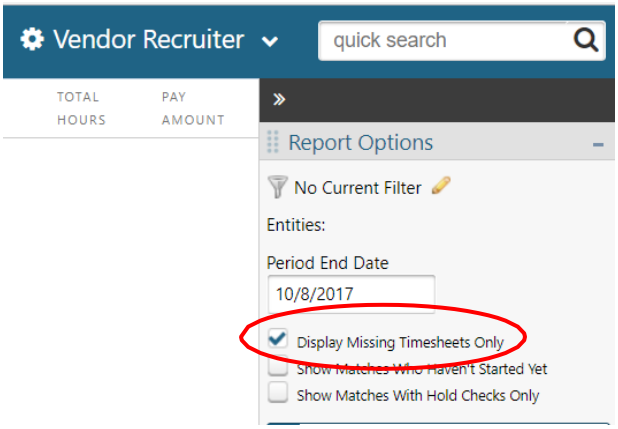
Timesheets Reports

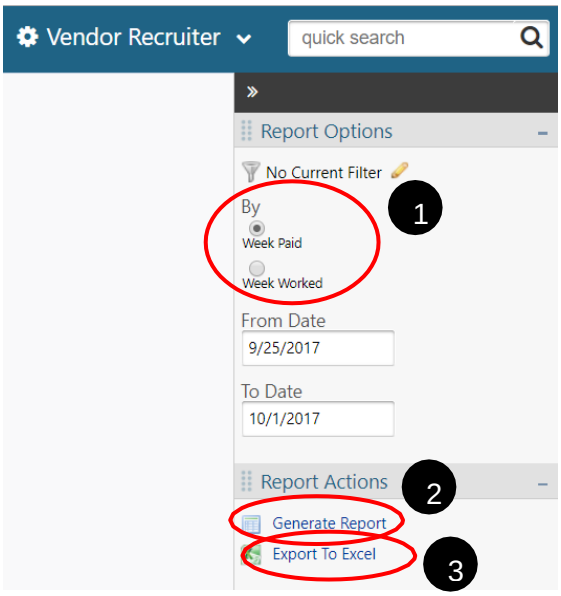
- Reports showing multiple timesheets can be accessed from the “Reports” widget on your dashboard.



- The “Missing Timesheet Report” provides timesheet data for a two week billing period.
    - Checking the box “Display Missing Timesheets Only” under Report Options in the right sidebar will show timesheets that have not been approved. These timesheets could be in Draft status (waiting for the contractor to submit hours) or Submitted status (waiting for the manager to approve hours).



- The “OSP Report” summarizes timesheet data over a date range. This report can be run for multiple in periods. The amount that will be paid to the vendor for approved hours is shown in the "Total Paid” column.
- The data for the OSP Report can be provided in 2 ways:
  - Week Paid
    - The Week Paid report provides all timesheets approved and paid in the selected billing periods, regardless of when the work was completed.
    - Timesheets from previous work weeks that were approved late may result in a contractor having more than two timesheets in a Week Paid period and no timesheets in another Week Paid period.
  - Week Worked
    - The Week Worked report provides timesheets by the week in which the work was completed, regardless of when the timesheet was approved.
  - To run the OSP Report:
    1. On the far-right side of the screen select “Week Paid” or “Week Worked.”
    2. Click “Generate Report.” The report will appear in the current window.
    3. Click “Export to Excel” to export the report in Excel.



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Reviewing Billing Details

- Timesheets are due by **12pm on Mondays**. Any timesheet approved after 12pm on Monday may be pushed into the next invoicing period.
- Timesheets and vendor billing details are finalized and available in erecruit by 12pm on Tuesdays.
- Please wait until **after Tuesday at 12pm** to pull timesheet data for paying contractors and invoicing Greene Resources.

Printing and Downloading Timesheets

- Open the timesheet that needs to be downloaded from one of the reports.
- Click the Generate Document link (with the icon) on the right sidebar.
- Select PDF or DOC.
- Click “Download Document.”