Classic Candidate Extensions

Legacy Web Extensions · https://learning.pcrecruiter.net/site/docs/web-extensions/configuring-candidate-extensions/

PCRecruiter's Classic Candidate Web Extensions allow jobseekers to view position data and add their own name records to the database. The incoming names are added to the 'default company' in your database, and can be connected to the pipeline for any active position.
Activation of this feature generally includes an administrator training session with a PCRecruiter trainer, during which most or all of the items below are configured.
The JOB BOARD has been the standard option in 2017 and beyond. See Job Board documentation.

We recommend opening the web extensions links for your database in one window while editing configurations in another, so that you can see the effects of your changes.

1. Log into, or have a database administrator log into, the PCRecruiter database.
2. Click SYSTEM and scroll down to "PCR Website Links"
3. Right-click on the URL labeled "Candidate URL (Without Registration)" and open it in a new tab or new window. It should look something like this: https://www2.pcrecruiter.net/pcrbin/regmenu.aspx?uid=dbname.profile

This is your candidate job board. When implemented into your website, it will be styled and branded to look like the rest of your website.

1) Configure Overall Settings

Click SYSTEM and search for "Job Board Info". This screen configures the URL and name of the job board to be used in auto-generated emails such as password reminders.

- Job Board Name: Appears at the top of your job search / menu form. A standard title is "My Company - Current Openings" or "Available Jobs from My Company".
- Job Board URL: The web address of your site or job openings page. (https://www.mysite.com or similar).

- Stylesheet: Use this option to disable all default PCRecruiter styling. Usually left in the 'Enabled' setting.
- Buttons: Switches button formats on the job board between standard HTML <button> tags and legacy PCRecruiter table-based buttons. The 'Use HTML Button' setting is the recommended option.
- Outgoing Job Board Links: Switches on/off the SSL (https://) mode for the web extensions links. 'Use Https' is the recommended option.

Click SYSTEM and search for "Web Ext". This screen configures the overall enabled/disabled state of the job board and its main functions:

- Candidate Registration:
  - Disabled (Turns off Candidate Job Board)
  - Allow Add: Allows candidates to add their own names to the system.
  - Allow Edit: Allows candidates to alter their information after adding it.
  - Allow Inquire: Allows candidates to apply to available positions.

2) Configure Search Form

Click SYSTEM and search for "Position Search". This screen configures the main menu / search form on the job board. We recommend using as few search options as necessary - providing too many options reduces the chances of the jobseeker selecting a combination that will return any results.

- Edit Registration: Showing this item allows returning candidates to edit their information and resume. Using the 'Hide' setting disables the [Log In] option. Using the 'Only Apply' option limits the option to register/log in to after a visitor clicks an 'Apply' button.
- Allow New User: If 'Edit Registration' is set to 'Show', changing this setting to 'Hide' removes the 'New User? Click Here' prompt to the right of it.
- Edit Profile: Allows the candidate to edit their Registration Profile, if one is being used (configured elsewhere).
- Browse By Area/Specialty: Allows the searching of jobs by PCR's built-in Industry/Specialty fields. This item is usually disabled.

- Advanced Search: Enables a secondary search form that includes Industry/Specialty, Salary, Date Posted, Job Type, Keyword, City, and State. This item is usually disabled.
- Keyword Search: Enables a freeform search box that searches the job description and keywords for matches.
- Job Title Search:
  - 'Show' enables a freeform title search
  - 'Multi-Select Dropdown' enables a list of currently available titles which can be selected by CTRL-Clicking or Shift-Clicking
  - 'Dropdown' enables a list of titles from which only one choice can be selected.
  - 'Checkbox' enables a checkbox list of currently available titles. This is the most common setting.
- Date Search: Enables a dropdown for searching jobs by date of entry.
- Search Button: Hiding this option disables the ability to search.
- Additional Search 1 - 10: Use these items to add up to ten additional standard and custom fields from the position record as searchable choices. The most common selections are the 'State Available (Checklist)' and 'City/State (Radius)' options.
- Featured Company Rollup: Select a rollup list of companies here to include a checklist of those companies' available titles on the search form.
- Featured Position Rollup: Select a rollup list of positions here to include a checklist of those position titles on the search form.
- Default Sort Order: Choose the order to list search results in. 'Job Title Ascending' is the most common choice (i.e. alphabetical order).
- View Position Inquiries/Applications: Allows returning applicants to view the titles of jobs they've already applied to for which they have not yet been moved forward in the pipeline. This item is usually disabled.
- Enable Shopping Cart: Allows applicants to link themselves to the pipeline of positions without applying to them for later review. This item is usually disabled.
- Enable Sharing Button: Enables a 'Share' icon on position records for jobseekers to share the position on various social networks.

- Allow Candidates to Apply to Filled Jobs: Normally, marking a position as 'Filled' hides it from the job board. Switching this on allows closed positions to continue to receive applicants. This item is usually disabled.

3) Configure Visible Job Data

1. Click SYSTEM and search for "Job Detail". This screen configures the fields that candidates can see when viewing positions. Only positions marked with "Available/Open" status, "Show" in the 'Show On Web' field, and more than '0' in the 'Number of Openings' field may show on the job board.
2. Choose 'Yes' or 'No' to show the available options. You may add an additional 10 custom fields at the bottom of the form.
3. Standard items to enable are Job Title, Date Posted, City/State, Position ID, and Job Description. Less common to display are Salary and Job Type information. In most cases, all other items are disabled.
4. If you intend to display Company information on your job board, you will need to enable that setting by clicking SYSTEM and searching for 'Show Info'.

4) Configure Candidate Registration

Registration Form

Click SYSTEM and search for "Candidate Registration". This screen configures the fields that candidates must complete when adding themselves to your database. In PCRecruiter, candidates "register" to add themselves to the database and "apply" to link themselves to a job.

To use this screen, click in the 'Field Name' column and locate the field you desire. You can use the 'Label Replace' column to provide an alternate name for a field, rather than the built-in one. Set the row to 'Show/Required' to make it required, or to simply 'Show' to make it optional. Set the item to 'Dropdown' or 'Dropdown/Required' if you are using a dropdown field. Comments entered into the final column will appear to the right of the field.

The normal configuration includes:

- Predefined: Upload_Resume
- Predefined: First_Name
- Predefined: Last_Name
- Predefined: Candidates.Email_Address

- Predefined: Phone_1
- Predefined: Password (Note: You may omit the password option, however this will require any returning applicants to use the 'forgot password' option to retrieve or reset their auto-generated password if they want to apply or alter their contact information in the future.)

When finished, use the 'Save' icon in the action menu at the upper right corner of this screen.

Login and Security Settings

Click SYSTEM and search for "Security Policy". This screen defines how strictly password data is handled for candidate records. PCRecruiter uses passwords for candidate records to allow returning applicants to apply to new jobs without re-entering all of their information or creating duplicates.

- Require strong passwords: Enable this option to turn on requirements for password complexity. If set to 'No', candidates can use any password at all, regardless of strength, and password expirations and other securities on this screen are ignored.
  - Require Symbol, Letter, Number, Upper Case Letter: When strong passwords are enabled, setting these options turns on which elements a password must include to be accepted.
  - Maximum Failed Logon Attempts: Defines how many incorrect tries a candidate gets before their login is blocked.
  - Minimum Password Length
  - Password to expire (default for new users): 'No' allows passwords to be used indefinitely.
  - Maximum password Age
  - Warn before expiring: Allows for an on-screen warning message when password is about to expire.
  - Allow Password to be re-used: Set to 'No' to force candidate to use a new and unique password when resetting password, vs. setting the same password again.
  - Days before password re-use: If setting the 're-use' option to 'No,' this option defines how long old passwords are remembered.

- Password Storage:
  - Store Plain in Identification Field: The default location for password storage is in the 'Identification' field on the name record. Many users prefer to use this field for a candidate ID instead, however, so the default is often changed to one of the 'Password' field options

instead. The password is stored unencrypted and may be viewed by internal users or emailed to the candidate as a password reminder.

- Store Plain in Password Field: When set to this option, candidate passwords are stored in the 'Password' field, which is available by clicking the 'key' next to the Identification field on the name record. The password is stored unencrypted and may be viewed by internal users or emailed to the candidate as a password reminder.
- Store Hashed in Password Field: When set to this option, candidate passwords are stored in the 'Password' field, which is available by clicking the 'key' next to the Identification field on the name record. The password is stored in a 'hashed' form so that it cannot be seen by anyone. Forgotten password emails include a link to reset the password rather than including the password itself. This is the most secure option and is therefore the recommended choice.

- Password Checking:
  - Validate By Identification or Password Field: When logging in, the system compares the candidate's password to both the identification field *and* the password field. This option is used in cases where the 'Password Storage' option has been switched after candidates are already in the database, allowing candidates to continue logging in with legacy credentials.
  - Validate By Password Field Only: When logging in, the system compares the candidate's password only to the 'Password' field.

Click SYSTEM and search for "Logon Screen Setup". This screen defines which field is used as the candidate's logon name. By default, the standard 'Email Address' field is the username, given that most people do not share an email account with anyone else. If needed, the 'Alternate Logon Field' can be set to store the username in a custom field instead.

5) Configure Emails

Notification Email to Applicant/Candidate:

Notification emails are best handled by creating an 'Automation Plan' for the job board. Automation Plans tell the system to perform one or more actions when a specific action is taken by the user.
Click SYSTEM and search for 'Automation Plans'.
Click the 'Add' option in the Actions menu at the upper right corner.

- Plan Name: Internal identification of this plan... for example 'Registration Thank You' or 'New Applicant Automation'. Not seen by the public.
- Perform Action When:
  - Inquiring/Applying: Select this option to run this automation every time a job seeker links themselves to a new position, regardless of whether they are a new or returning candidate.
  - Registering: Select this option to run this automation only when someone is adding their name to the database for the first time, regardless of whether they apply to any positions or not.
  - Profiles/LinkedIn Questions: This option is used when creating automation plans to run based on custom questionnaires.
- Expand the "Send Form Letter" option
  - To Email: By default, the email will go to the 'Email Address' of the person who just applied or registered. You may use the selection popup to pick a different email field, or manually enter an email address if you want to route all notifications from this plan to the same email address.
  - From Email: By default, the letter will use the System Administrator Email Address (see SYSTEM > 'Organization Details'). You may use the selection popup to use the position contact or user's email if this is an Inquiry/Apply plan, or manually enter an email address if you want to send all notifications from this plan from the same email address.
  - Form Letter Subject: By default the name of the form letter will be used as your subject line, but you may replace it with an alternate subject here.
  - Form Letter Name: Use the selector at the right to pick the form letter you want this automation plan to send. 'Interview' type form letters are recommended, as they are allowed to merge information from both the applicant's own name and the job they are applying for.
- Check the checkbox to the right to enable the automation **(Important! Email will not be sent if this step is skipped!)**.

Notification Email to Internal Users or Job Contacts:

Click SYSTEM and search for 'Inquiries'. In the 'Inquiries/Apply' screen:

- Email Position Inquiry:

    - Use Default Settings: Notifies the PCR user whose username is on the position record and, if the system is set to show company info on the job board, also emails the position's primary contact.
    - Do Not Send Mail
    - Send Email To User Name
    - Send Email To Primary Position Contact
    - Send Email To All Position Contacts: Notifies both the position's primary contact and any additional names attached to it under Associations.
    - Send Email To Username or Position Contact if Username is EMPLOYER: Notifies the PCR user whose username is on the position record, or the position contact if the job was entered via the Employer Portal.

- Send Inquiry to System Admin: Defines whether the System Administrator email address gets an email about applications as well - the System Administrator email is configured under SYSTEM > 'Organization Details'.
    - Do Not Send Copy
    - Send Position Inquiries Only
    - Send Position and Candidate Inquiries: 'Candidate Inquiries' refers to situations where the Employer Portal allows outside searching of candidate records (Usually disabled.)

- Click the EMAIL icon in the sidebar menu to create a custom notification email. Use the 'Insert Fields' button to add data from the position and name to the email notification. Checking 'Reply To Candidate Email Address' uses the new applicant's email address as the 'reply-to' email address on the message rather than the system admin's email.

6) Additional Options

EEO Collection

If you need to collect Ethnicity, Gender, Veteran Status, and Disability Status information for applicants, you must enable the EEO collection screen.
Click SYSTEM and search for 'Collect EEO'.

- Collect EEO Data: Switch to 'Yes' to enable this feature. The EEO screen will appear after an applicant confirms their interest in a position by clicking 'Apply'. If they are a new applicant, this screen will appear after they have supplied their other required details.
- Enable the Other Option in the EEO Source: Turns on a manual entry box for 'Source', allowing the applicant to manually specify where they heard about the position if the provided dropdown doesn't include the option they're after. To define a list of sources, search for 'Diversity Source List' under SYSTEM and add one or more Source Name values.
- EEO Introduction/Conclusion: Specify your text to appear at the top and bottom of the form.
- Phrasing: You may specify your own text for each of the fields used in this screen. PCRecruiter's default configuration includes the text currently provided by the US Government and should not require adjustment.

Profile Forms

PCRecruiter's profile forms can be used as part of your web extensions to collect additional information.
If you wish to connect a profile to the apply step for a specific job, you will need to add the profile to that job.
To associate a profile with the registration step itself, so that *all* new candidates are prompted to complete the form:
Click SYSTEM and search for 'Profiles'.

- Append To Registration
  - Resume Only: The standard configuration requests a resume from the candidate and no profile.
  - Candidate Profile With Resume: Select this option if you are collecting the resume *and* a profile.
  - Candidate Profile Without Resume: Select this option if you are collecting a profile but *not* requiring a resume. Note: If you choose this option and do not specify a Registration Profile, the system will not collect a resume nor a profile.
  - Candidate Profile Only if Resume is Skipped: Select this option to present the profile only if the registrant declines to submit a resume.
  - One-Click Apply: In this configuration, the profile is used *in place of* the candidate registration form. Your profile must include Email Address and Password collection to work in this format. This configuration also skips the step which prompts applicants to log in if they are already

registered.

- Candidate Registration Profile: Use the selector at the right to choose the profile you want to use as specified by the 'Append to Registration' option.
- Apply/Inquire Submit Screen: If you wish to replace the text of the 'confirmation' step which appears after a candidate clicks 'apply', you may specify a profile form here. The most common setup is a profile which contains only a caption with text along the lines of: "Click the button below to confirm your interest in this position." Any data collected on this profile form will be included in the notification email to the internal user or job contact (if enabled) but will not be saved in the database.
- Include Resume: Checking this box causes the system to attach the candidate's resume to the email notification sent to the user or job contact (if enabled).

The 'Advanced' sidebar item can be used for creating rules for specifying the registration profile based on fields in the registration form. For example, if you wanted to collect a different form if the registrant specified their state as 'CA' on the registration form, you might add this configuration to the Advanced screen:
Predefined: State || EQ || CA || (selected profile)

Filter Jobs by a Rollup

By default, the job board will display all jobs in the system marked with 'Available/Open' Status, a '1' or higher in the 'Number of Openings' field, and 'Show' in the 'Show On Web' field. You may, however, filter the job board to a sub-set of these jobs.

Click SYSTEM and search for 'Rollup Lists'. Use the selector for 'Job Board Rollup (Optional)' to specify a position rollup list. Once saved, any job which is not on this list will be hidden from the job board.

(Note: The "New Candidate Rollup" on this screen allows all incoming names to be placed on a Rollup. The other items on this screen are related to the Employer Portal.)

Apply with LinkedIn

Click SYSTEM and search for 'LinkedIn Apply'. This option adds a second 'apply' button to all positions, giving the applicant the option to use their LinkedIn profile and credentials to register and apply. NOTE: Applicants who use this option will be routed directly through LinkedIn's apply process,

skipping any custom forms, fields, or collection utilities configured in PCRecruiter.

- Enable LinkedIn Apply
  - Disabled: Standard PCRecruiter process only.
  - LinkedIn Apply Only: Applicants may *only* apply using LinkedIn.
  - LinkedIn Apply/Standard Apply: Two apply buttons will be presented. Applicants may choose to apply with your PCR configured process or use LinkedIn's process instead.
- API Key / Secret Key: Leave blank if hosted on the PCRecruiter ASP service.

Click Agreement

Click SYSTEM and search for 'Click Agreement'. This option allows you to add a required agreement below the registration form, or after registration but before submitting a resume.

- Enable Click Agreement*: The text below will appear *after* registration is completed with an 'Accept' and 'Decline' button. The text on the buttons can be adjusted in the 'Accept/Decline Caption' boxes. This is only used in circumstances where the resume upload is optional and not part of the registration form. In this scenario, choosing decline skips the resume submission step only.
- Enable Click Agreement* (Registration Form): The text below will be added to the bottom of the registration form with a checkbox that must be checked before the candidate can add themselves to the database. This is the most common configuration if any agreement is used.
- Disable Click Agreement
- Use As Custom Message*: The text below will be added to the bottom of the registration form for informative purposes, but does not require any action from the candidate.

* If this feature is enabled but no agreement text is entered in the large box, the system will automatically display generic 'resume submission agreement' text. We do not recommend enabling this option without entering your own text.