New Admin User Training Track

Getting Started · https://learnpcr.pcrecruiter.net/site/docs/getting-started/new-admin-user-training-track/

This page provides a self guided Training Track for new Admin level users to assist with the setup, configuration, and use of PCRecruiter. Please note that this is a suggested flow involving all available features which may not reflect your exact process. If you have questions please reach out to the administrator at your organization or to our support team.

Setting up User Accounts

For brand new databases you will be provided your login information from the welcome email sent to you. If you do not have this email please reach out to our support team. If you need help navigating the database the Orientation page will help you get a feel for the general layout and common icons within the software.

All databases come with both Admin and TEMPLATE users by default, however we recommend creating a personal username for each user. The Admin account can be used as a backup login in case you forget your password or your account is locked out. Follow the linked instructions below to add and set up new users into your database.

1. First Log in using your ADMIN account.
2. Create User Accounts for yourself and any other users.
    - Helpful Hint: You can copy the user settings from the existing Admin account for quicker user setup.
3. After adding your Username to the database, log out of the Admin user and sign in under your username.
    - Make sure that the User Security for your account has System Administrator Level Permissions.
4. Next you will set up the Outgoing Email Settings for your database. This setting is different than the personal email setup and only requires 1 authentication for the entire database.

5. Connect your personal email for both incoming and outgoing emails. This allows you to send emails from the database, automatically records activities for incoming emails, and is essential for several other features.
    - Outgoing Email Setup
    - Incoming Email Setup
6. Configure your email signature. If you experience difficulties with formatting please reach out to the support team for assistance.
7. If you are using the RingCentral phone integration follow the setup instructions. This integration allows you to make Calls and send SMS messages from within the database while also automatically tracking these activities.
    - While RingCentral is the only direct phone integration we offer at this time, we do have other options for connecting phone systems. If you are using a different phone system please contact the support team or your account manager to inquire about other options.

Configuring the Database

While PCRecruiter provides a number of default and templated items in your database you may find that you want to define specific values, such as titles, that can be entered into your database. Standardizing these items can assist you with data integrity, future data usage, and ensure successful use of the software. This also ensures that databases managed by multiple users have a standardized process to keep consistent data across the entire organization. If you have a brand new database with no data you may want to circle back to these settings after getting a better feel for the software.

Setting Standardized Values

- Title List
- Keywords
- Source List
- Custom Fields and Values

Learning to Use PCRecruiter

The following explanations and article links will help you to learn how to navigate and work within the software. Each feature will have a general explanation and example use cases for the feature. Please note that this includes all areas of the software, all of which may not be applicable to your workflow.

Adding Records to the Database

There are several ways to add in new records to the software. This is the first step to building up your database for future use. Please note that the successful use of the software is heavily reliant on the information stored within it, so this is an important step to help prevent the need for data cleanup later on.

- Adding Records
- Social Network Profile Capture Tool (LinkedIn, ZoomInfo, etc.)
- Email Integration tool: For parsing Resumes, Adding attachments, and updating contacts.
  - PCR for Outlook
  - PCR for Gmail
- Bulk Inhaling Resumes
- *Importing Spreadsheets* (Not yet available from the frontend. Please contact the support team to import any spreadsheets you wish to add to the database.)

Managing Data

The following features help you to be able to ensure that you are able to quickly and effectively access records for future use.

- Viewing Records in the Database
- Types of Records
  - Name Records
  - Company Records
  - Position Records
- Record Information

    - Summaries
    - Attachments
    - Notes
    - Resumes

Searching and Organizing Data

The ability to quickly find information from your database is essential to streamlining your process.

- Searching in the Database
    - Searching for individual records
    - Searching for multiple Records
- Viewing and Configuring Search Results
- Organizing Records With Lists

Contacting Records

Using the database for emails, calls, or SMS messages to communicate with the records in your database is an essential utility of the software. PCR will also track your previous communications so you can see who and when you previously connected with someone.

- Sending an Email
- Making Calls
- Sending SMS
- Creating Email Templates

Tracking User Activity

PCR tracks actions taken by users in the database using activities. These can be referenced in the future to see previous interactions and communication with the record. These can also be used to set future events and follow-ups and placed on the schedule.

- Tracking Activities
- Types of Activities

- Preset System Activities List
- Searching for Activities

Daily Task Management

Ensuring that you are organized and on track for your daily process is essential. We have a number of different features that can assist you with making sure you are working efficiently and not missing any steps in your process.

- Utilizing Lists
- Using the Calendar for Scheduling
- Managing Daily Tasks: This can be done using either of our two types of Sequencing features, click HERE to see the differences between them.
  - Simple Sequencing
  - Advanced Sequencing

Tracking the Hiring Process

Applicant tracking is the primary goal of the recruiting process. The Pipeline feature allows you to organize the process and ensure you do not miss out on any potential options for placements. The Presentation feature allows you to send a live link to the client showing qualified candidates and allows them to submit feedback.

- Setting up your Recruiting Workflow
- Viewing Position Pipelines
- Working with Records In the Pipeline
- Configuring Candidate Presentations
- Presenting Candidates to the Client
- Viewing Feedback from Clients
- Placing Candidates

Job Boards

PCR allows you to post jobs in the database directly to your website for your candidates to apply to. Once they have applied they will be automatically linked to the Pipeline. Please note that the job board settings are not available on the front end for the user and must be set up by our Web Developer. Please reach out to the support team if you want to utilize this feature.

- Job Board Information

Creating Questionnaires

The Profile feature in PCR is used to create forms which can be used for data collection or record analysis. These Profile forms can be sent via a live link in an email or filled out internally by the user. Once completed these forms can be found in the attachments tab of the record for future reference.

- Creating Profiles
- Using Profiles Internally
- Using Profiles Externally

Reporting Options

PCR offers both our Analytics (live-updating reports) and Manual Reports which can be exported. Instructions for viewing and customizing these can be found below.

- Analytics
- Standard Reports
- Custom Reports