Job Notes and Documents

Revision history

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Introduction

During the recruiting process you might need to add a note to a job. From the Notes tab of a job card, you can:

- Add notes to a job
- Add notes to email recipients
- Attach documents

This guide shows you how to add notes and documents to a job.

What you will do

- Add a note to a job
- Place a job on hold
- Add a document to a job

Definitions

Term	Definition
Job card	The job card initiates a requisition with specific and relevant details of the job, posting language and requirements, and includes an approval process with notifications and alerts to approvers. With a unique ID to represent each requisition, it facilities central information collection and tracking. The job card also associates users to the requisition by their roles in the recruitment process, such as the Hiring Manager, HR/FA Representative (Recruiter), Search Committee Chair and other key team members. A common job card is shared for the CSU system. However, each campus can specify which fields to display on the New Job page. Job card is sometimes used to refer to the New Job page or the Requisition Information form.
Library	A collection of documents and folders that exist in the CHRS Recruiting system. The library can contain such documents as interview guides, offer letters, and position descriptions. This is a system-wide library. Each campus has a folder and is named with the campus initial.

Add a note to a job

As the job progresses through the recruitment process, you might need to add notes to the job. The job card provides a place for these notes, as well as a way to send notes directly to email recipients. Notes are attached to the job and can be accessible based on permission.

When to add a note to a job

You can add a note to a job at any time. Typically, notes are added to record information about the recruiting process.

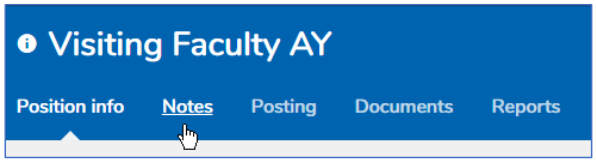
Prerequisites and assumptions

- You have permission to edit or delete job notes.
- The job card is currently open.

Guidelines

How to add a note to a job

1. On the job card, click the **Notes** tab.



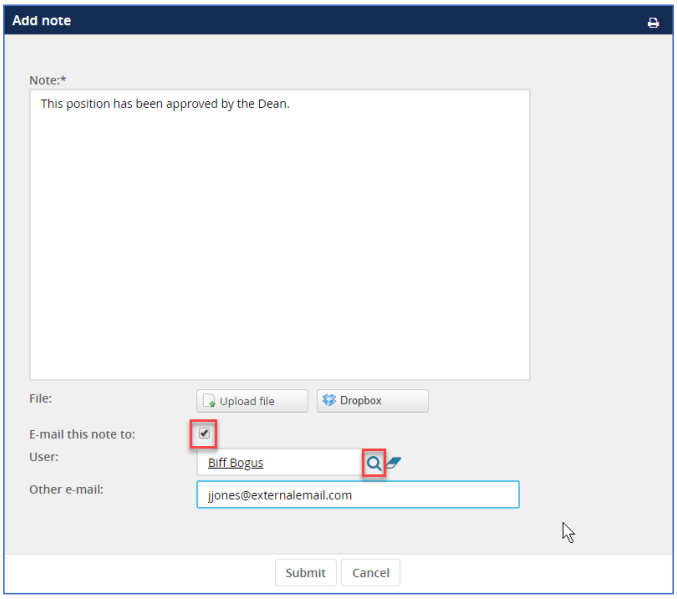
2. From the Add menu, select **Note**. The Add note window opens.
3. Enter the text that you want to save.
4. Click **Submit**.

How to email a note to a user

Occasionally, you might want to send the note as an email to a specific user.

1. On the Add note window, click the **E-mail this note to** check box.
2. Use the magnifying glass search field to find and add the user.

3. If the user is not in the CHRS Recruiting system, you can type the email address in the **Other e-mail** field.



To send the note to multiple recipients, insert semi-colons(;) between the email addresses.

4. Click **Submit**. The email is sent to the recipient.

How to upload a file

You can add files to the note. The files can be included in the email if you are emailing the note to the user. You can add files from a file system or from Dropbox, if your browser supports Dropbox.

To upload a file from the file system:

1. Click **Upload file**.
2. Select the file.
3. Click **Open**.

To upload a file from Dropbox:

1. Click **Dropbox**.
2. Log in to Dropbox.
3. Select the file.
4. Click **Choose**.

Guidelines

- You can add only one document per note.
- If you click Cancel at the bottom of the Notes tab, you exit the job card. Click another tab to leave the Notes tab.

What happens next

The note is added to the job.

Related documents

Creating a job

Training box – Job Notes and Docs

Place a job on hold

You can place a job on hold for a period of time without affecting the overall Time to Fill data.

When to place a job on hold

- You need to put a job on hold.
- You do not want to affect the accuracy of the Time to Fill data.

Prerequisites and assumptions

- You have permission to edit or delete job notes.
- The job card is currently open.

How to place a job on hold

1. On the Notes tab, select **Hold day** from the Add menu.
2. Use the calendars to set the beginning and end dates for the hold.
3. Enter any notes needed for the hold.
4. Click **Submit**.

Guidelines

You cannot remove or delete existing hold days.

What happens next

- The number of days specified in the hold are subtracted from the total Time to Fill days.

Related documents

Creating a job

Add a document to a job

You can add documents to a job. These documents can then be accessed by anyone who has access to the job. For example, you might want to attach the position description to keep it with the job.

When to add a document to a job

You can add a document at any time.

Prerequisites and assumptions

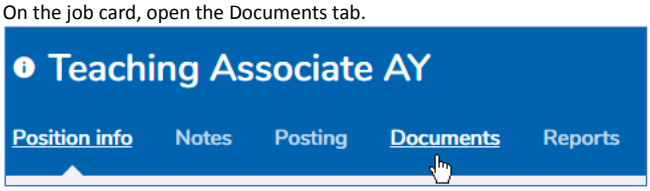
- You have permission to view the job.
- The job card is currently open.
- The document that you want to add exists on a file system or in the PageUp document library, within your campus's subfolder.

Commented [ZX1]: Document section permission is with job card. So, access to job allows access to documents.

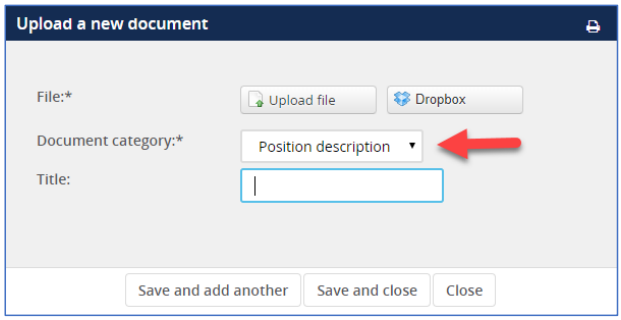
Anyone who have access to view the job, will have access to view the documents attached to this job.

How to add a document to a job

1. On the job card, open the Documents tab.



2. From the menu, select one of the following:
   - **Document from a file** – Select a document from the file system or from Dropbox.
   - **Document from library** – Select a file that is in the CHRS Recruiting system document library.
3. Select a **Document category:***



4. Optionally complete the **Title** field.
5. To upload a file:
   a. Click **Upload file**.
   b. Select the file.
   c. Click **Open**.

6. To upload a file from Dropbox:
    a. Click **Dropbox**.
    b. Log in to Dropbox.
    c. Select the file.
    d. Click **Choose**.
7. Click **Submit**.

What happens next

- The document is added to the job card.
- Users who have access to the job can view the associate documents.

Related documents

Creating a job

Document management