Sci.bio Recruiter Guide to Kortivity

Updated July 2021

Overview

Welcome to the Sci.bio Recruiter Guide to Kortivity! Sci.bio uses the ATS, Kortivity, (historically also referred to as "Scibase") to manage our candidate and client database. As a member of the recruiting team, you will use Kortivity to add and view potential candidates, change the candidates' position in the recruitment process, add job listings, communicate with clients and candidates, and more!

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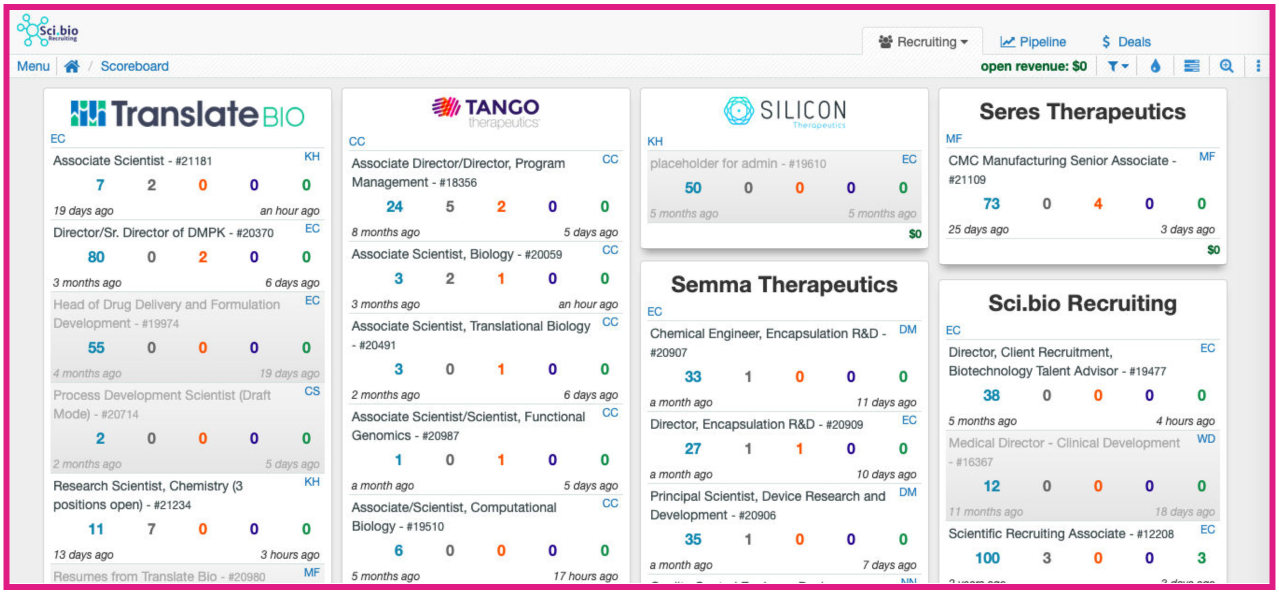
Logging in to Kortivity

To log into Kortivity, go to the Kortivity website. Then, using the login information provided to you by a member of our administrative team, enter your username (i.e. your email) and your temporary password (this will be given to you via our team; you can then change it after successfully logging into Kortivity). The login screen will look like this:

Understanding the Home Screen

The Home Screen to Kortivity displays all companies Sci.bio is currently recruiting/consulting along with all open/drafted positions for each client. It will appear as such:



Each open/drafted role will have the position title, job number, a flowbar to indicate the recruiting stage, the recruiters' & account managers' initials, a time period of when the role was opened and the last time it was worked on/updated. The Account Manager's initials is displayed in the Upper Left-Hand corner of the company's box (CC: Carina Clingman). The Recruiter's Initials are displayed in the Upper Right-Hand corner of each Open Role (CC: Carina Clingman). Underneath the Hiring Manager section you will find a Numerical Flowbar, which denotes the number of candidates at each stage of the recruiting process.

Blue: **New and/or Contacted Leads**

Black: **Candidates Presented to Hiring Manager**

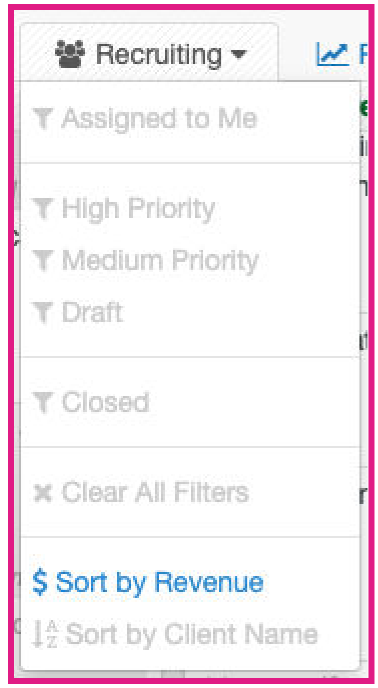
Orange: **Candidates Interviewing**

Purple: **Candidates Offer Extended**

Green: **Candidates Hired**

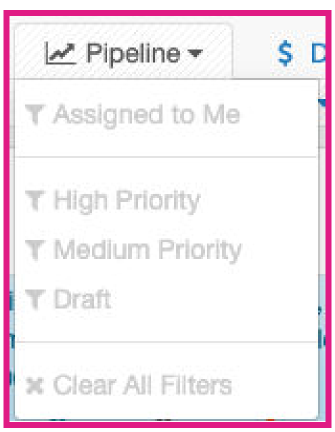
Underneath the Numerical Flowbar will be two sets of dates. The date to the left is when the job was opened. The date to the right when the job was last worked on/updated. If you see a position in the **Color Gray**, it means that the position is in "Draft Mode" (as seen in Crisper). If the position is clear (as seen in Tango), it means the position is in "Open Mode". The difference between these dwells with the marketing settings. When a position is left in "Draft Mode" you will not see it posted on our Sci.Bio website under Job Search. Leaving some positions in Draft Mode can be helpful if the company is doing a discreet search or if the Job Description is not complete but you wanted to begin sourcing. (Page 11)

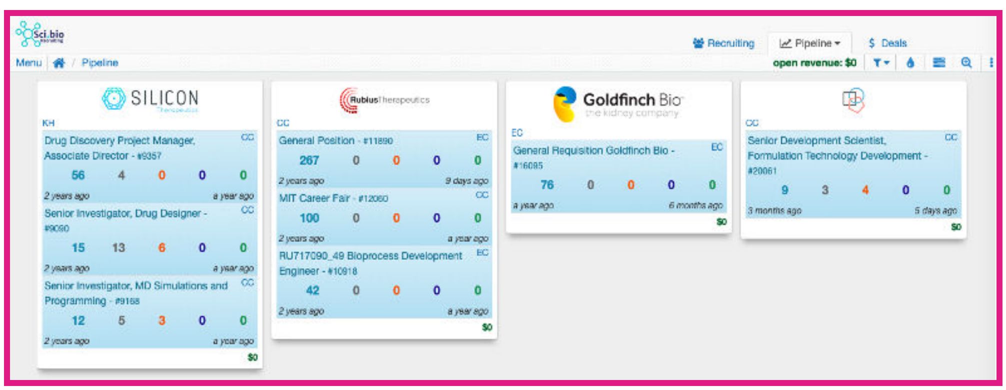
Tabs (Upper Right-Hand Corner)



The Three Tabs in the upper right-hand corner of the Home screen include the "Recruiting" Tab (the Home Screen - Page 2), a "Pipeline" Tab and a "$ Deals" Tab. When you click the downward pointing arrow for the 'Recruiting' Tab, a dropdown menu will appear. This menu will allow you to alter the display of the home screen. You can filter roles by "Assigned to Me", Priority, Draft, or Closed. After playing around, you can clear all filter set and return to the original home screen settings.

Next to the Recruiter Tab are the two other Tabs: "Pipeline" and "Deals". The Pipeline Tab allows you to view Open Positions that could be coming up from a Client, but we are not currently working on. This tab also has a Drop-Down Menu similar to that of the Recruiting Tab- enabling you to organize positions by Priority, Draft Mode, or Assignment.





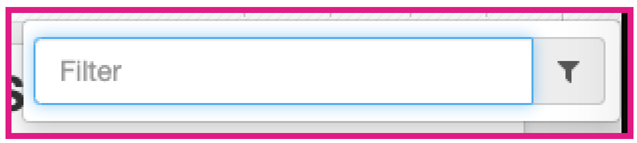
Deals

The "Deals" Tab enables you to view the number of Deals that are in the pipeline between Sci.bio and their Clients. This is helpful from a Business Development perspective, and does not need to be consulted by recruiters in their day to day work. The Deal history with each client can also be seen on the "client" page.

For Business Development team members, the Deals tabs should hold the pipeline of all the clients you are actively working to close. NOTE: This is for CLIENTS we are hoping to bring in, not CANDIDATES we are courting (those can be tracked through Planner tasks or Talent Pools).

As your client contact moves through the process from "not contacted", please update the deal to show where they are in the process, until they become "Active Clients" and have open reqs on the home page.

Task Bar (Upper Right-Hand Corner)

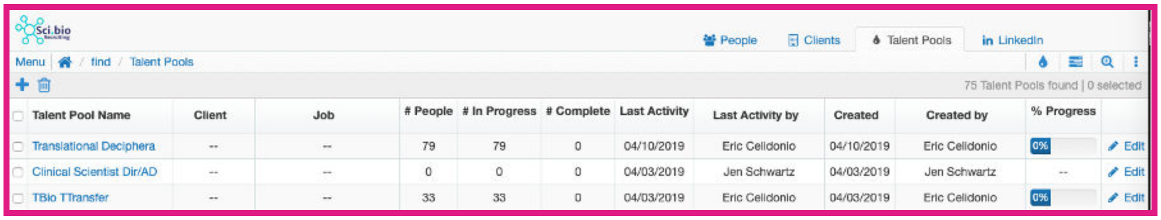


The Task Bar in the Upper Right-Hand Corner of the home screen allows you to do multiple things relevant to organization. The **Open Revenue** box pertains to the "Deals" Tab, and can be ignored by most recruiters. The **Blue Funnel** with the Downward Arrow is the "Filter this Page" Button. When you click this Button, a Drop-Down Fill in the Blank Box will pop up, enabling you to filter the Home Page based on which Client or Open Role you wish to view. The **Blue Water Droplet** Button allows you to "View All Talent Pools." The Blue Progress Bar Button allows you to "Add Activity to Your Planner" and is there to help you organize your schedule. The Blue Magnifying Glass Button allows Recruiters to Search for anything in Kortivity. To do this, a Search Bar will appear underneath the button on the screen. This is helpful when searching for a role that's been closed, a past client, a prospect or candidate. The final Button on the Task Bar is Three Blue Vertical Dots that allow you to Perform various Actions, Jump to Settings, What's New, and the Planner, and view your Recent History.

Talent Pools

When you click this water droplet Button, it will bring you to all created 'Talent Pool(s)'. An overview of talent pools can be found here:
https://kortivity.zendesk.com/hc/en-us/articles/360013090672-Talent-Pools-Overview

Any user can create their own talent pools by clicking on the "+" button (left hand corner under Menu). Talent pools are helpful in various different ways. If a future client contacts you (the recruiter) looking for a high level profile type, you can create a talent pool and present it as a talent map in your initial meeting. You can use Talent Pools to collect candidates with a specific skill set, either for a confirmed upcoming need, or to look back on for future roles. Sourcers can collect potential candidates for open roles here, and connect the talent pool to the job so that the recruiter can review and offer feedback without cluttering the req itself with passive candidates who may not be a good fit. Once you've created your talent pool, you can send all leads to a specific job. After creating a talent pool you can compile a list of leads for either a specific upcoming job, current job or particular category.

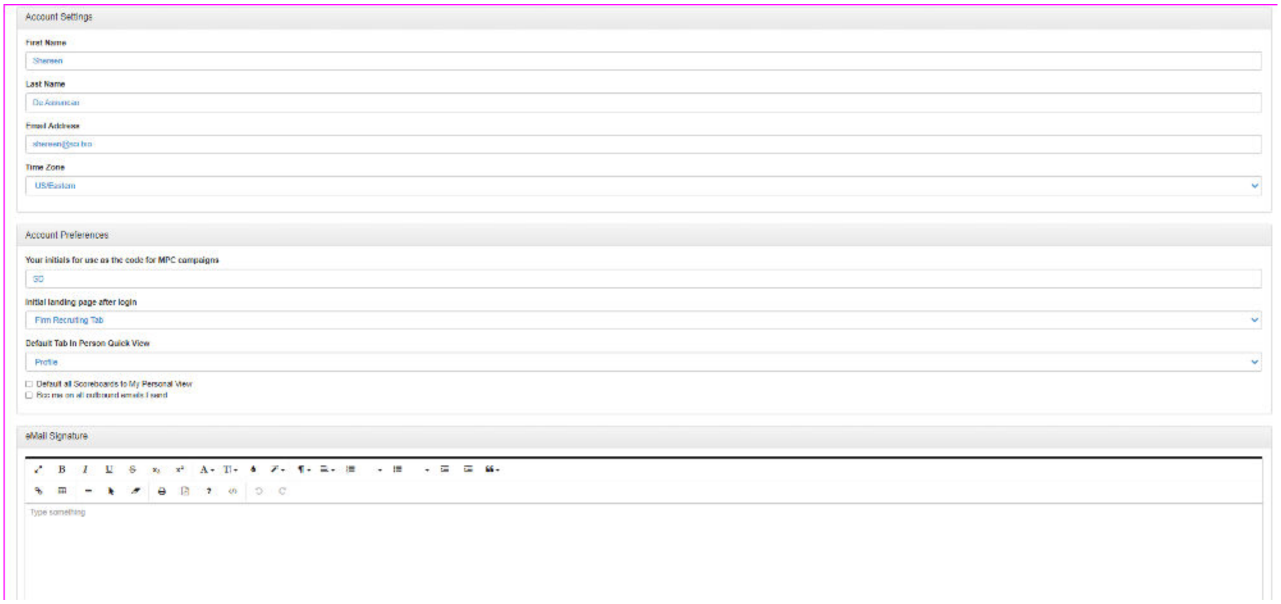


Talent Pool Name	Client	Job	# People	# In Progress	# Complete	Last Activity	Last Activity by	Created	Created by	% Progress	
Translational Deciphera	--	--	79	79	0	04/10/2019	Eric Celidonio	04/10/2019	Eric Celidonio	0%	Edit
Clinical Scientist Dir/AD	--	--	0	0	0	04/03/2019	Jen Schwartz	04/03/2019	Jen Schwartz	--	Edit
TBio TTransfer	--	--	33	33	0	04/03/2019	Eric Celidonio	04/03/2019	Eric Celidonio	0%	Edit

There are a few different methods in adding people to a talent pool. One method is to click on the talent pool you created and click the "Add Person" button. This allows you to manually add people from our database. Another is to compile a CSV file and tell the system to add call prospects to a talent pool.

Settings

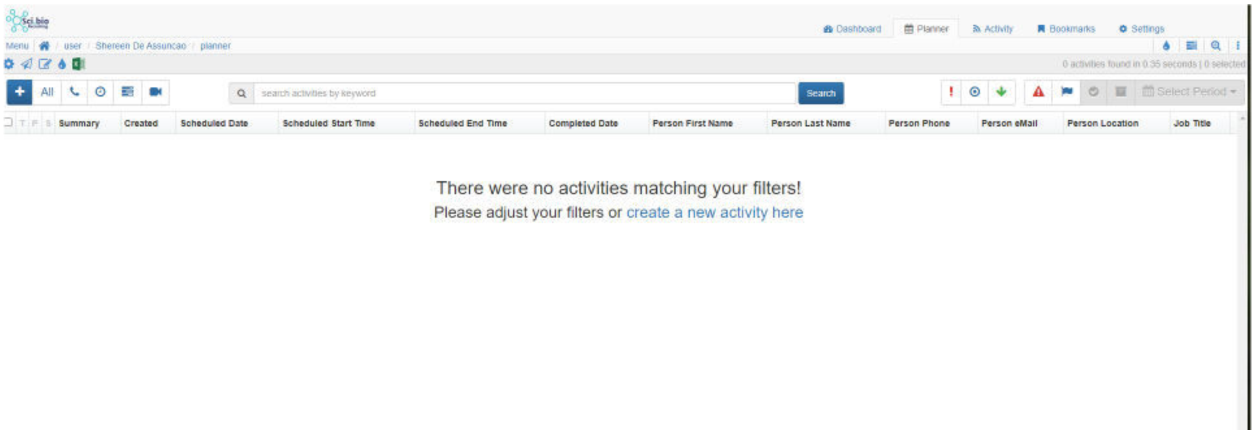
In settings, you are able to add in your email signature (please match the format in your sci.bio email) and edit account preferences.

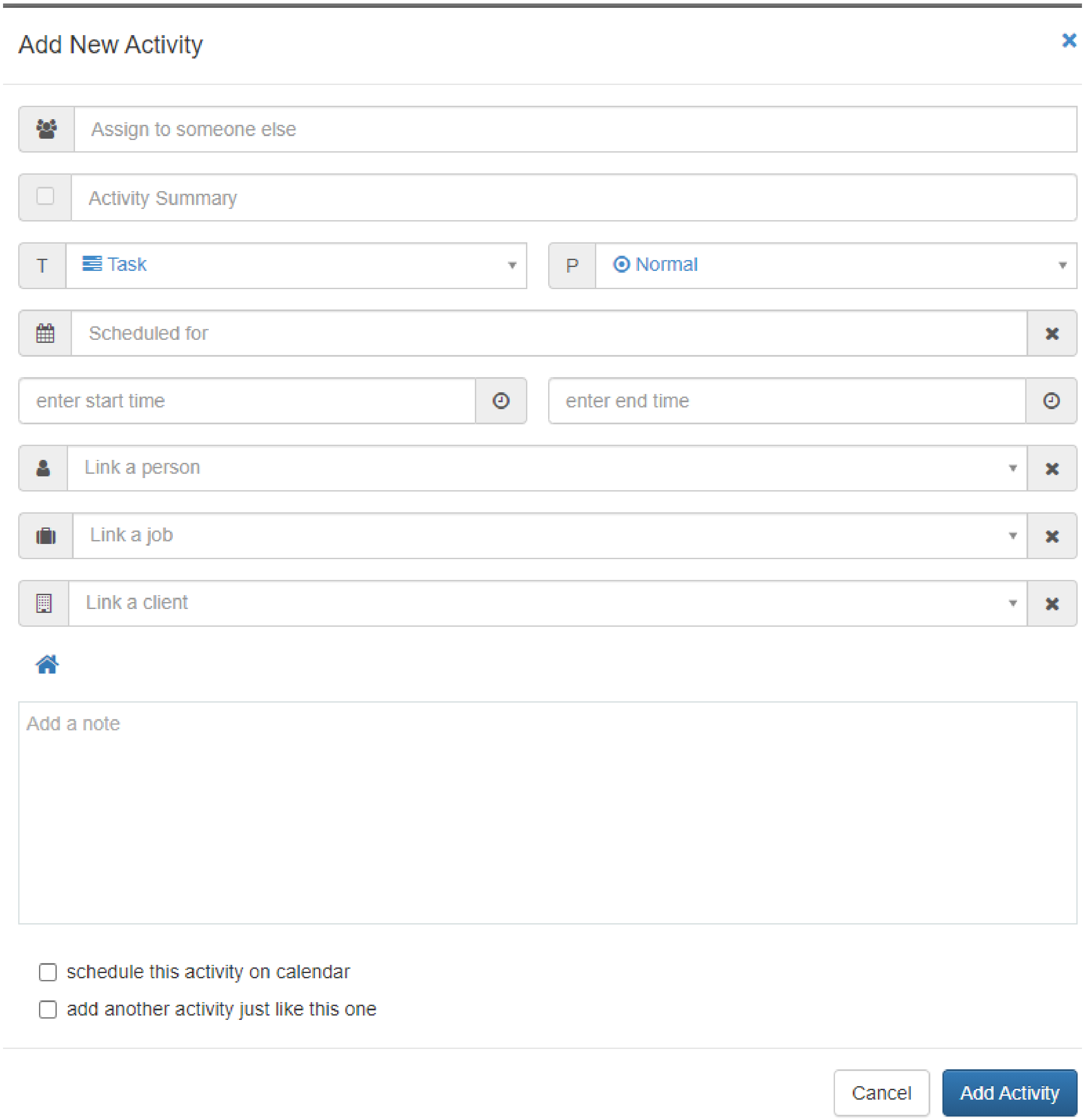


Planner

Planner is a great tool to help keep your tasks organized in one place. This is most helpful for calls and follow-ups that you need to schedule further out, i.e. a 1 month check in with a contractor, or when a client requests a call back "after year end".

Click the "+" to add an activity and a box will pop up.

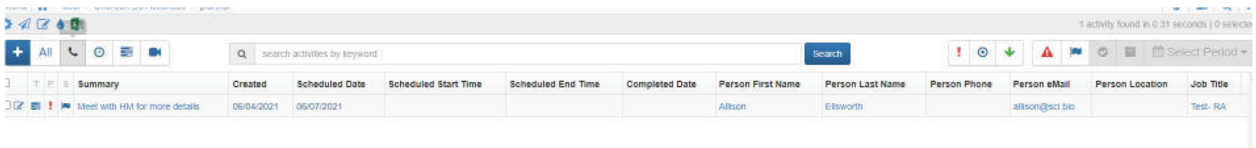




Make sure you fill in as much information as you can.

- Detailed summary information
- What kind of task it is (call, task, etc)
- The date it is scheduled for
- Link at least to a person in Kortivity; ideally, also a client company and/or open job.
    - Planner activity is also visible on candidate application views from reqs, as well as on the relevant person records

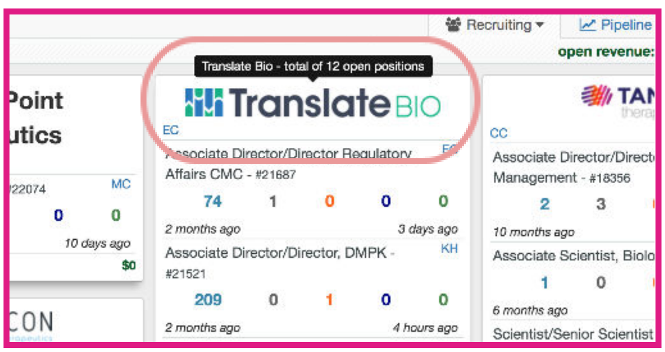
After adding the task, it will appear on your screen in the list. Note that you can show/hide calls, tasks, all activity by clicking each of the icons. You can also set the date range or filter by priority/overdue.



To **complete the task,** click on the title to open the activity and click the checkmark next to the summary to complete the activity. You can also create a follow up activity by selecting "create another task like this" at the bottom of the screen.

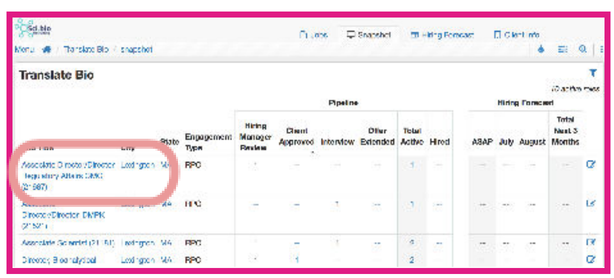
Clients

All current clients are displayed on the Home Screen. Each client has a number of open or drafted positions, all of which are found under their title. To further investigate each role, click either on the client's title or the specific role you wish to view.



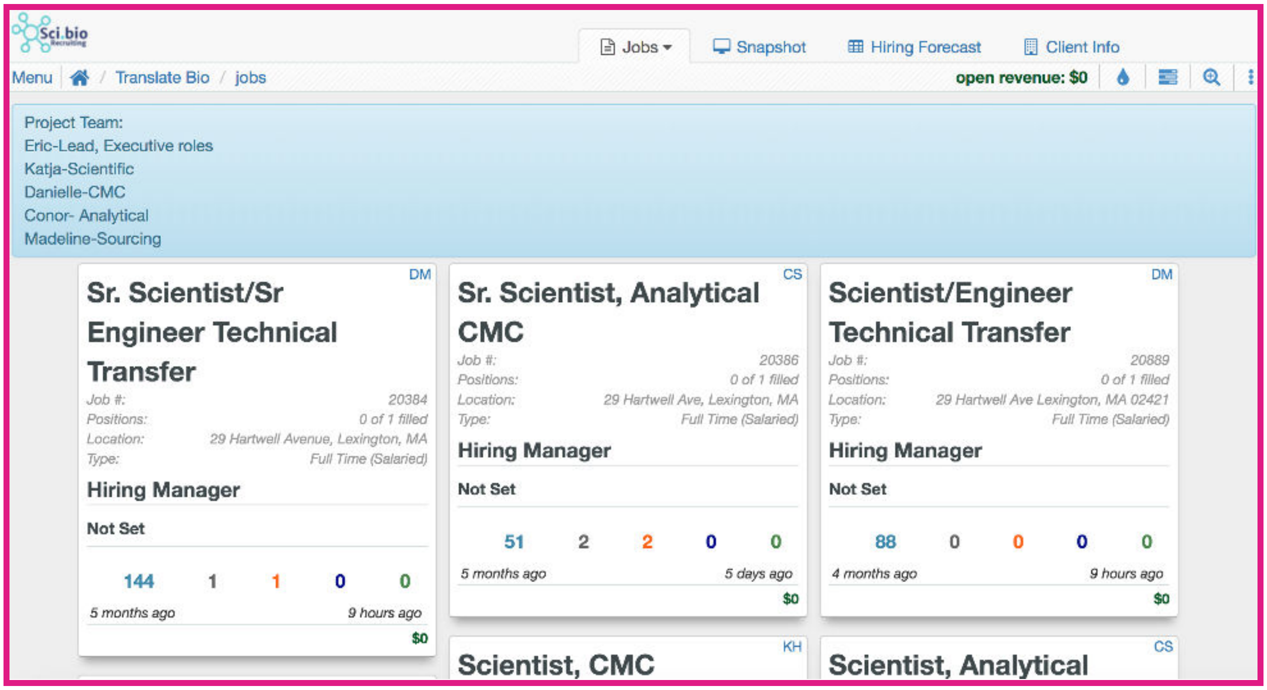
If you click on the client's title (such as "Translate Bio") it will lead you to all of Translate Bio's roles (as seen below).

Click on the tabular button "Jobs" to have a different view of all jobs or click directly on the job to directly you wish to work on.

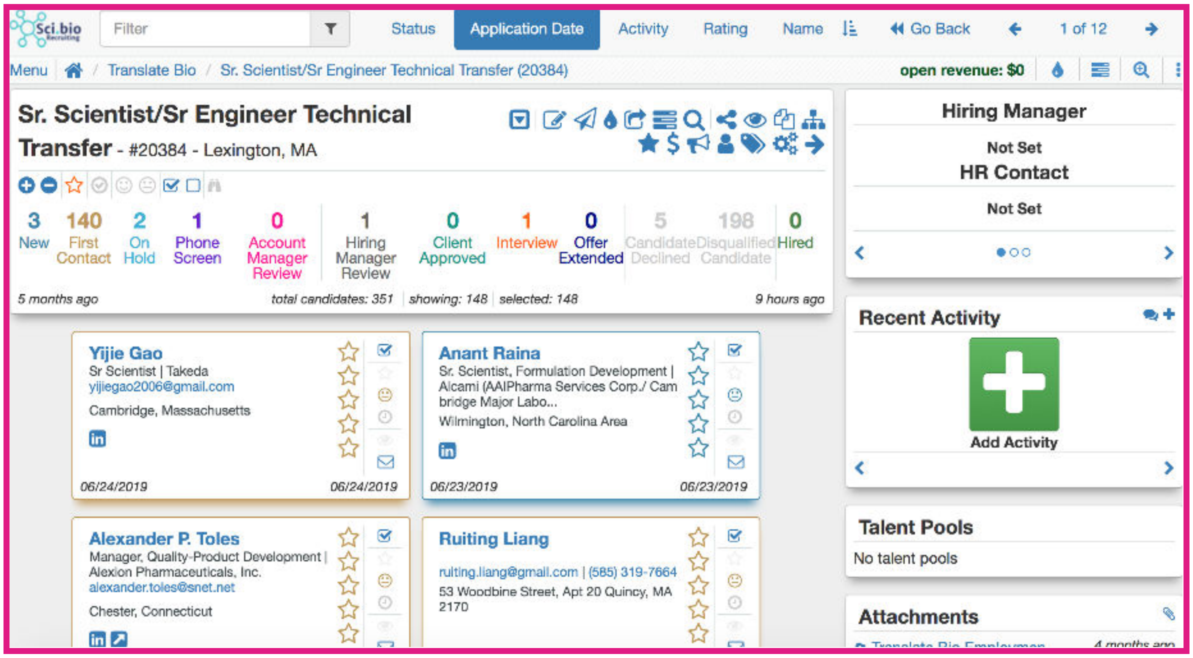


Open Jobs

If you click on the tabular "Jobs" the screen will appear as below. Here we see a different view of all open/drafted jobs for this client.



You can select which job you'd like to view to see even more information about/update a role:



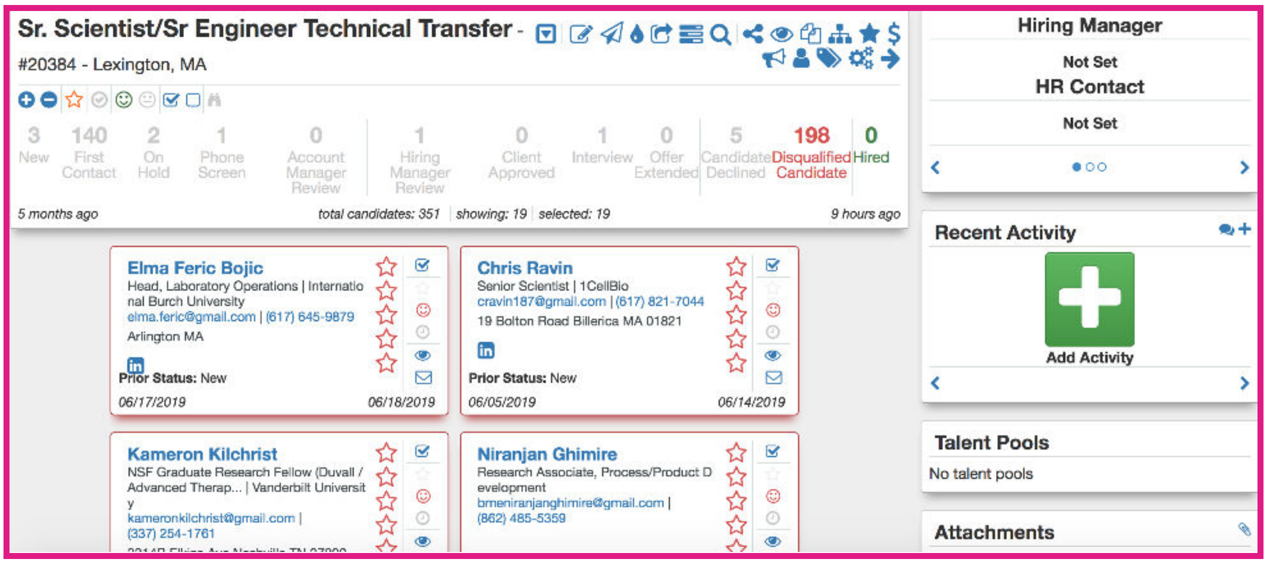
By clicking on the job, you can directly see which prospects have been contacted and which ones have declined the opportunity. Whenever a prospect applies or is added to the job, he/she will appear as “New”. If a prospect has been contacted, you will manually update the prospect’s status to “First Contact”. If a prospect responds and a phone screen is set up, the candidate will be updated to “Phone Screen” - so on and so forth.

Let’s manipulate some of the information seen/hidden:

If you click on the “140 First contact”, it hides all the prospects that have (only) been contacted. You will now only see: New, On Hold, Phone Screen, Hiring Manager Review and Interview.

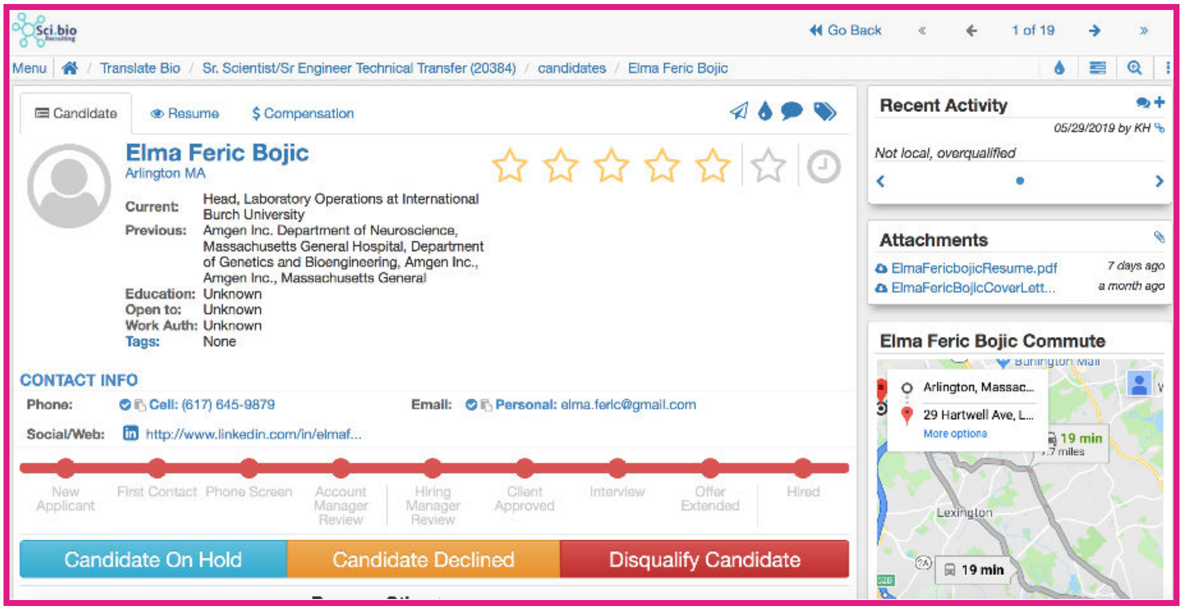
If you only want to see all the candidates that have been disqualified click on “New”, “First Contact”, “On Hold”, “Phone Screen”, “Hiring Manager Review” and “ Interview” to hide all prospects logged into these sections. Now click on “Disqualified Candidate”. You will now only see the disqualified candidates:

If you want to see which candidates have applied and been disqualified click on the smiley face:

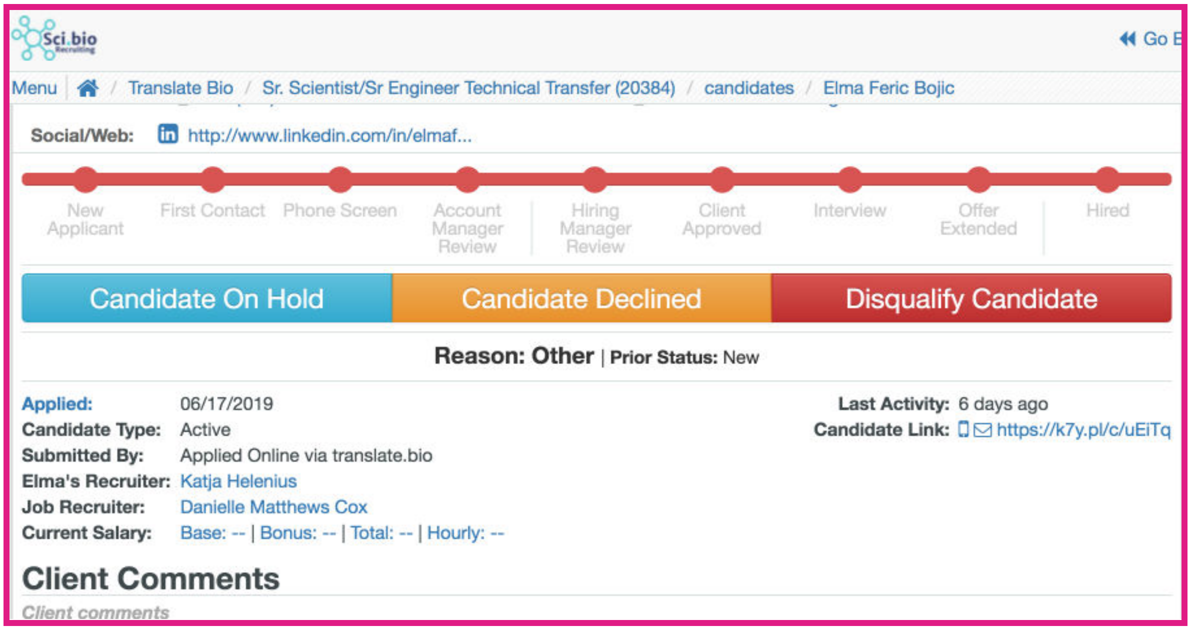


Here we now only see the candidates that have applied and been disqualified. If we click on the first candidate “Elma”. It will open to her profile in our database for this client:

Here we can see this candidate's current and previous positions, their number, email and

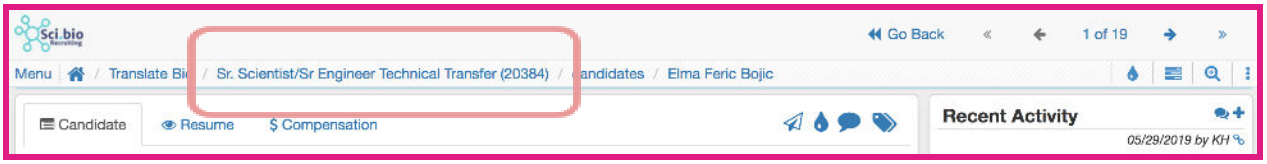


LinkedIn profile. On the left side, under "Recent Activity" we can see Katja Helenius (KH) left a note on 05/20/2019 stating the candidate is "Not local, overqualified". To add more notes click the "+" button. (This note was likely from when Katja disqualified this candidate). Under "Attachments" we can find the candidates Resume. To see more, scroll further down to see how they applied and other information.

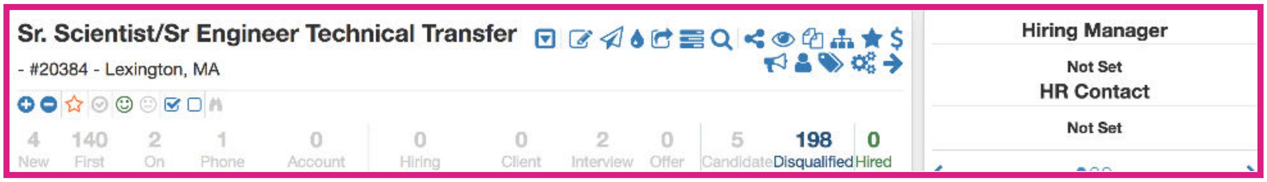


Job Marketing Settings and Job Details

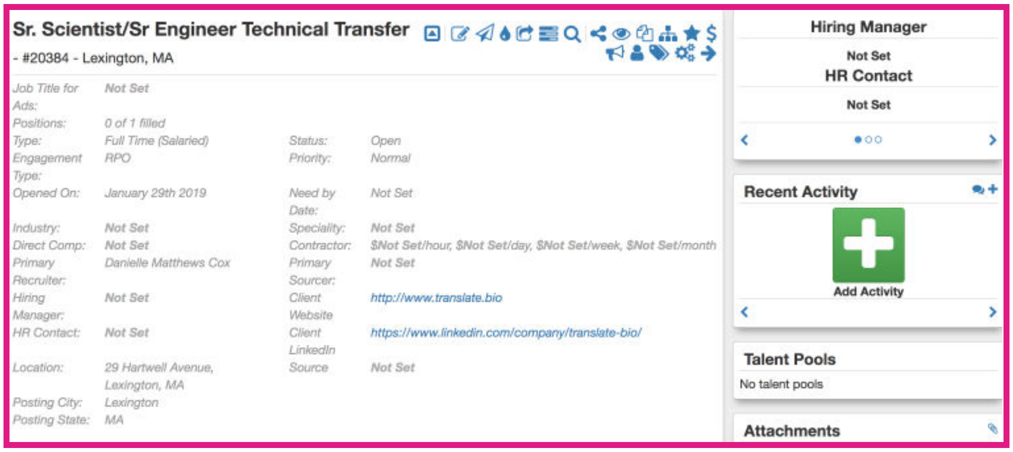
Return to the role in order to view the job details and marketing settings.



To then view the job description/details click the downward arrow:

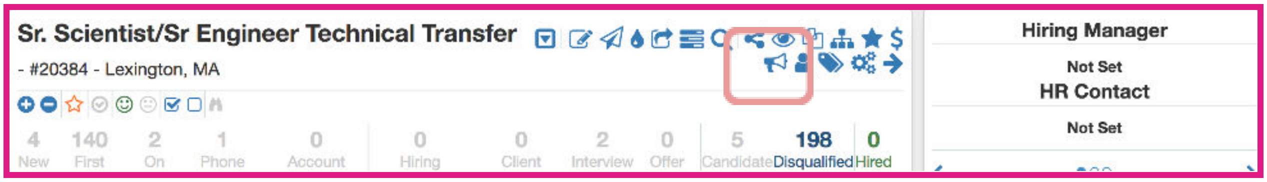


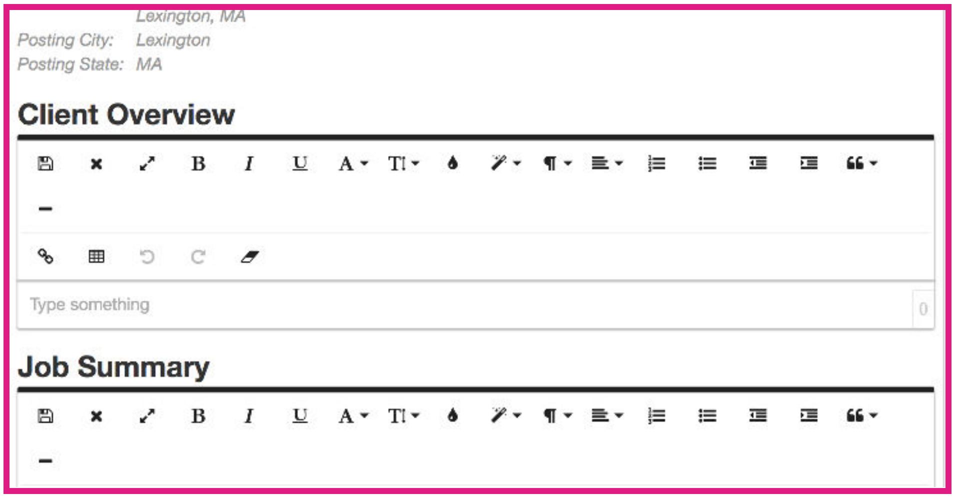
You can then see the following drop- down menu to the right. Here we can see the job details - when it was opened, the primary recruiter, location of the position, job summary, job responsibilities, etc.

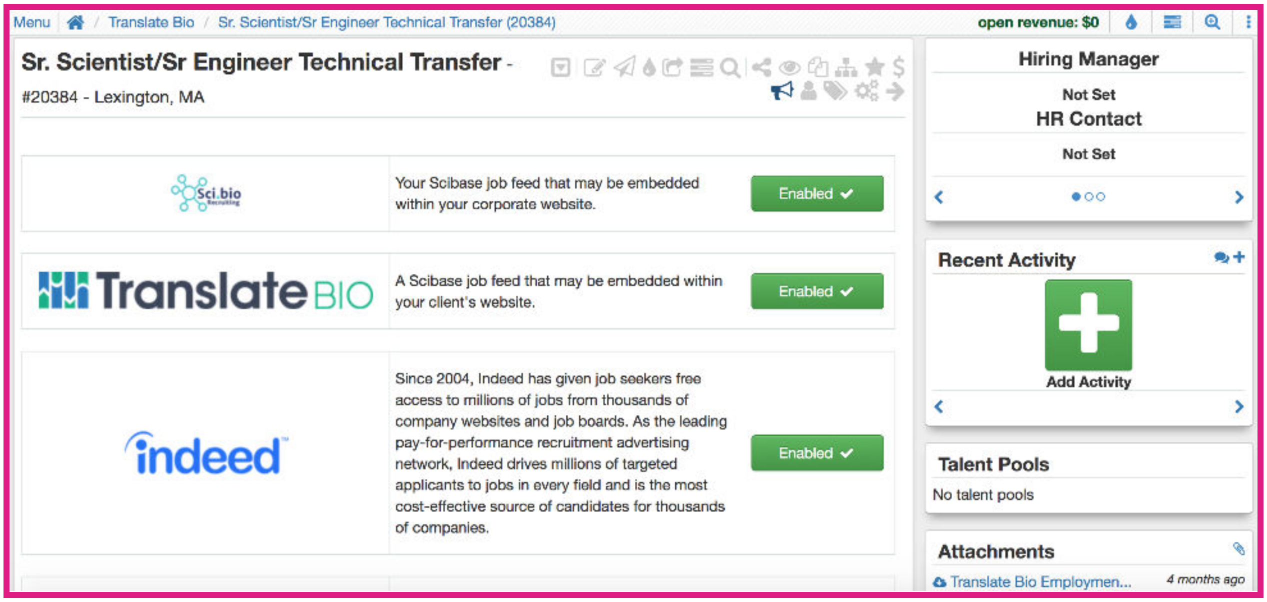


Re-click the arrow to hide this information again.

To view the marketing settings of the position click the horn:



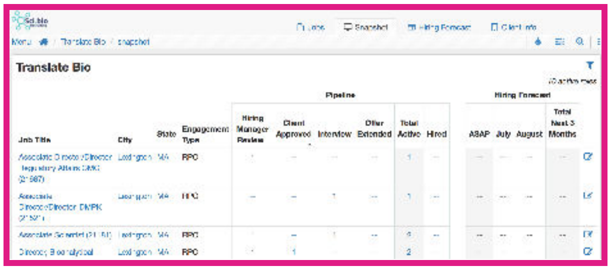




The marketing settings show where the job has been posted through Kortivity. For this position it has been posted on our Sci.Bio job search website, Translate Bio's career website, Indeed and a couple different places. We can tell where the position has been posted by the green "Enabled" button. To disable the posting click the button and it will appear as "Disabled". Each company prefers different marketing settings depending on the contract and job type. **Please note that if the position is in "Draft Mode" the marketing settings are automatically disabled. Every other setting automatically posts to our website unless you make changes.**

Client Information Tab

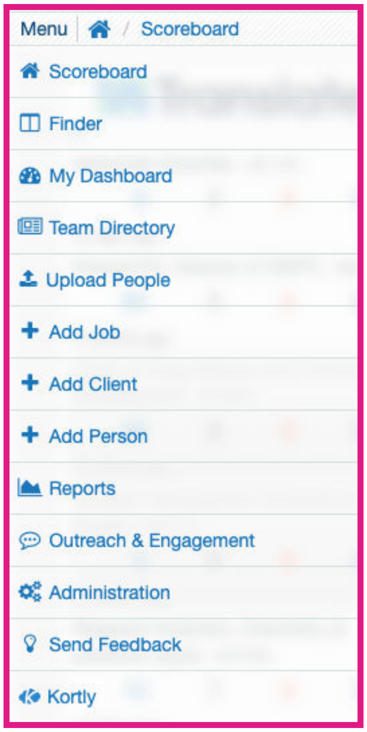
Going back to the Client view, you will see other tabs with different information along the top right side. The far right is Client Information. This view provides an overview of all client information, including linked contacts, placements, and deals.



Person Records

When you search for a person through the Finder feature, or click on their name from the candidate record, this brings you to the Person page. Similar to the Client record, this is an overview page that will show all the jobs and talent pools the candidate is attached to, all activity for that person, and all tags and attachments for this record.

Menu Sidebar (Upper Left-Hand Corner)



When you click the "Menu" Button in the upper left-hand corner of the screen, a Drop-Down Menu will appear.

Click "**Scoreboard**" to view the Home Screen with Clients and Open Roles.

Click "**Finder**" to search Kortivity for Applicants and Clients.

Click "**My Dashboard**" to view Applicant Pipeline, Interviews, & More

Click "**Team Directory**" to view the Sci.bio Team members.

Click "**Upload People**" to add Candidates.

Click "**Add Job**" to add a Role for your Company.

Click "**Add Client**" to add a Client to Kortivity.

Click "**Add Person**" to add an Employee to Kortivity.

Click "**Reports**" to view Applicant Pipeline Related Information.

Click "**Outreach & Engagement**" to view Reach & Contact

Click "**Administration**" to Manage Users, Questions, Tags, etc.

Click "**Send Feedback**" to Send Feedback about Kortivity

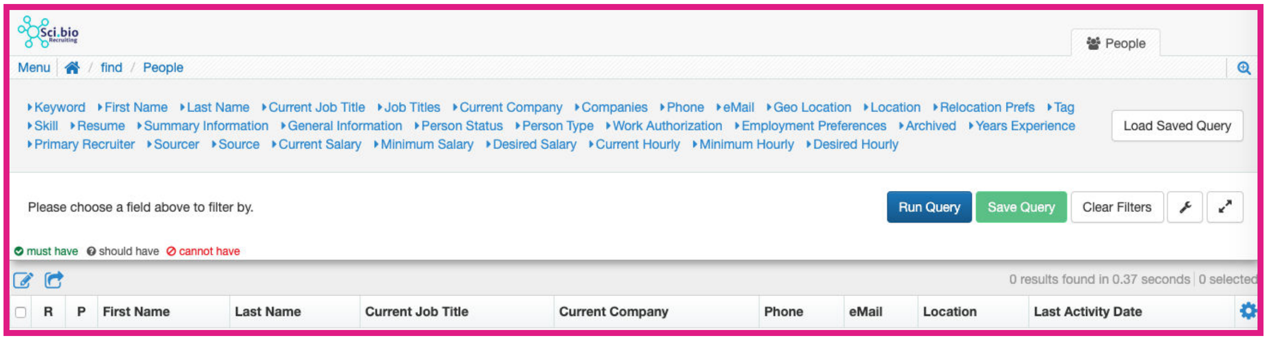
Click "**Kortivity**" to see Information about Kortivity

The "Scoreboard" Button

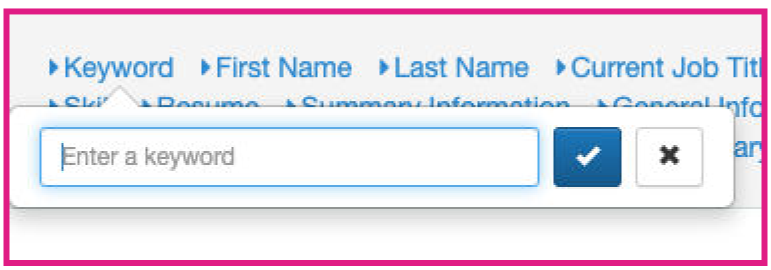
The "Scoreboard" Button is the screen you see when you initially log into Kortivity. As previously stated on Page 2 under "Understanding the Home Screen," this is where you will see all active

Clients and their corresponding Open Roles. To read more, please go to “Understanding the Home Screen” Section.

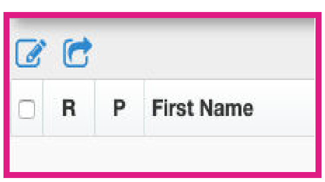
The “Finder” Button



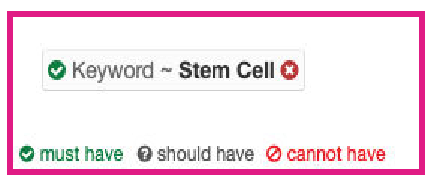
Using the “Finder” Button, you can search the Kortivity for any candidate or client user. When clicking this Button, this screen (shown above) will appear. The blue options listed at the top of the screen are categories to search by. To enter search information, click on the desired category and type in your search words and then press the Blue Check Mark to enter your search word into the Query. Once your term is selected, you can choose to include or exclude that term in each search by changing the “Must Have” green check mark to “Should Have” or “Cannot Have.”



Once you have chosen what terms you want to include or exclude in your search, they will appear in the bottom left-hand corner of the screen. To remove a term, press the Red X next to the term. To run the search on Kortivity, press “Run Query” and the results will appear at the bottom of



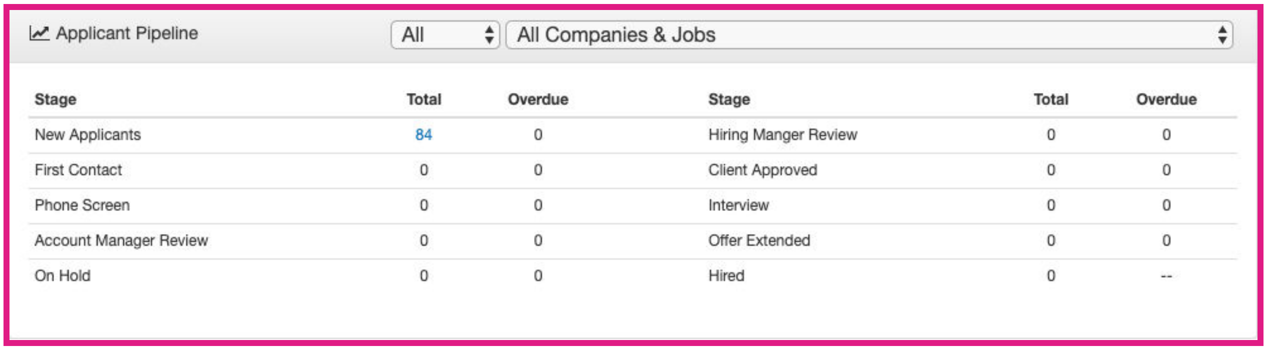
the



screen. Search results can be saved using “Save Query.” Old searches can be pulled up again with “Load Saved Query.” Additionally, you can reset a search with “Clear Filters.” To change the status of all search results, click the notepad and pencil tool located in the bottom left of the above image. To submit all search results to a job, click the right arrow image located in the bottom left of the above image. Search results can also be manually selected and unselected.

The "My Dashboard" Button

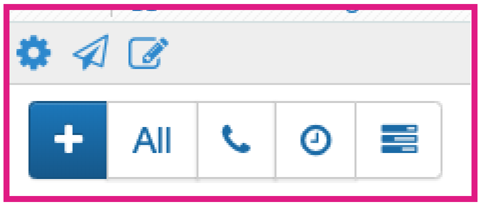
When you click the "My Dashboard" Button, you get a quick view of the Applicant Pipeline (pictured below). More specifically, this shows the number of Applicants at each stage of the Recruitment Process. At the top of the box is a Drop Down menu where you can sort Applicants by Company. This page also shows Upcoming Interviews scheduled, Active Candidates with Clients, and any Planner Activities that you have.



Stage	Total	Overdue	Stage	Total	Overdue
New Applicants	84	0	Hiring Manger Review	0	0
First Contact	0	0	Client Approved	0	0
Phone Screen	0	0	Interview	0	0
Account Manager Review	0	0	Offer Extended	0	0
On Hold	0	0	Hired	0	--

In the Upper Right-Hand Corner of the Screen are a series of Tabs that include the "Dashboard" (as described above), "Planner," "Activity," "Bookmarks," and "Settings."

When you click the Blue "Planner" Tab, it shows you all Activities (Past and Present). You can Sort and View Activities by Summary, Date Created, Scheduled Date, Scheduled Start Time, Scheduled End Time, Completed Date, Person's First/Last Name, Phone Number, E-Mail, and Job Title. In the Upper Right-Hand Corner you will also find a series of Buttons. The Blue Gear Button to the Left allows you to "Change Visible Columns." The Blue Paper Airplane Button allows you to Send Bulk Emails and the Blue Pad with Pencil Button allows you to Update any Selected Activities. Below these three Buttons are a set of Five Buttons: the Blue Plus Sign allows you to add an Activity, the "All" Button allows you to view "All Activities," the Blue Phone



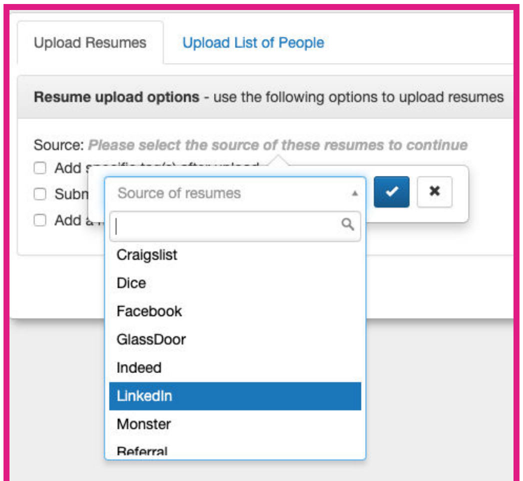
Button allows you to organize activities based on Phone Calls, the Blue Clock Button allows you to sort Activities by "Appointments," and the Three Blue Horizontal Bars Button allows you to sort Activities by "Task." Next to this set of Buttons is a Search Bar that allows you to search Activities by Keyword. To the Right of the Screen is another set of Buttons that allow you to organize the Activities on your screen. The Three Buttons furthest to the Left allow you to sort Activities by Priority (the Red Exclamation Point sorts for "Top Priority," the Blue Bullseye sorts for "Medium Priority," and the Green Downward Arrow sorts for "Lowest Priority"). The Four Other Buttons to the Right of the screen also allow you to sort your Activities: the Red Triangle shows "Overdue" Activities, the Blue Flag shows "Planned" Activities, the Green Circle with the Checkmark shows "Completed" Activities, and the Blue Filing Box shows "Archived" Activities. When you click the "Select Period" Button, you can view Activities from a certain time period (i.e. Last Month, Last Week, Yesterday, or a Custom Range of Dates).

When you click the Blue Activity Tab, a screen with your recent activity will show up (i.e. email communications via Kortivity, Uploaded People, and any edits to Candidates' statuses). The Blue Bookmarks Tab allows you to view any Applicants, Clients, or Open Positions that you have Bookmarked. The Blue Settings Tab allows you to change your Account Settings and Email Signature.

The "Team Directory" Button

The "Team Directory" button allows you to see all of the Sci.bio Team Members and their corresponding information. For example, you can view their Title, Sci.bio Email, Phone Number, Address, and their Online Status (i.e. when they were last online). The Green Circle next to their name indicates they are currently Online.

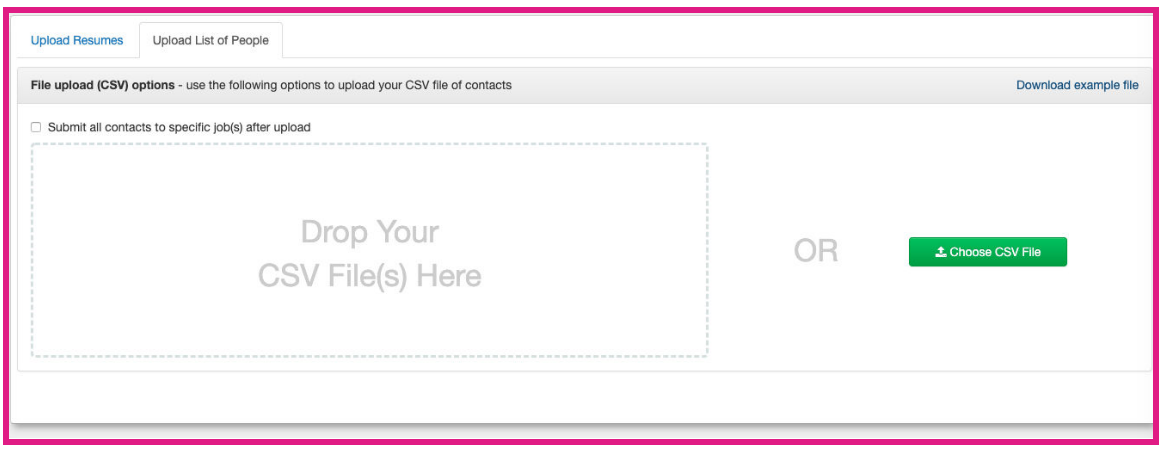
The "Upload People" Button



After selecting the "Upload People" Button from the Drop-Down Menu, three Tabs will appear.

Under the "**Upload Resumes**" Tab, input the Source of the Resume by clicking the line that says "Please select the source of these resumes to continue" and then select the source from the Drop-Down Menu (i.e. Linkedin, Indeed, or Your Name). Below the Source of Resumes, you will see a list of Options. If you need to add any Specific Tags, submit the candidates to certain jobs, or add notes to the candidates, select those options **PRIOR** to uploading resumes. For example, if you want to add resumes to a particular job requisite, check-box "*Submit all to specific job(s) after upload*". A drop box appears under and you fill out which job requisite you want all prospects sent to. Once you write the source and click the checkmark, a drag-and-drop box and green "Choose Resumes" button will appear. Add/Drag all resumes you wish uploaded. I always recommended double checking the system to ensure resumes were properly added.

Under the "**Upload List of People**" Tab, click the "Download Example File" document located in the top Right-Hand portion of the screen. A csv file will download. Once it is downloaded, click the file and it will open with Excel. In the Excel file will be the Example Applicant's personal information (i.e. Full Name, Job Title, Contact Information).

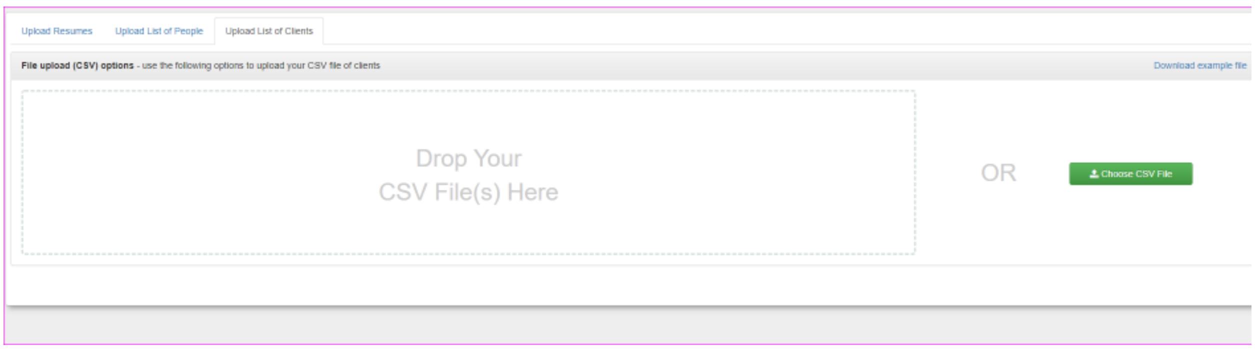


The CSV file will appear as such:

A	B	C	D	E	F	G
Title	First Name	Last Name	Suffix	Job Title	Company	Email1
Mrs	Cynthia	Alvis		Airman	A.J. August Fashion Wear	cynthiajalvis@cuvox.de

By manually filling out all known information (leave all unknown information blank), you can add a mass amount of people at one time into a talent pool or requisite. If you want to submit all Candidates to a role, select that option **PRIOR** to uploading the CSV into the ATS by clicking the box labeled “Submit all contacts to specific job(s) after upload.” Once you have uploaded your CSV file with your Applicant’s information, they will be automatically entered into Kortivity.

Under the “**Upload List of Clients** ” Tab, click the “Download Example File” document located in the top Right-Hand portion of the screen. A csv file will download. Once it is downloaded, click the file and it will open with Excel. In the Excel file will be the Example Applicant’s personal information (i.e. Full Name, Job Title, Contact Information).



The CSV file will appear as such:

A	B	C	D	E	F	G
Title	First Name	Last Name	Suffix	Job Title	Company	Email1
Mrs	Cynthia	Alvis		Airman	A.J. August Fashion Wear	cynthiajalvis@cuvox.de

By manually filling out all known information (leave all unknown information blank), you can add a mass amount of clients at one time.

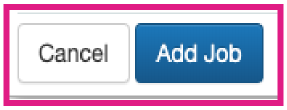
The “Add Job” Button

There are a couple ways to add a job, one way is to click this “Add Job” button. Another is to return to the home screen, click the client, click the tabular “Jobs” (Page 14).

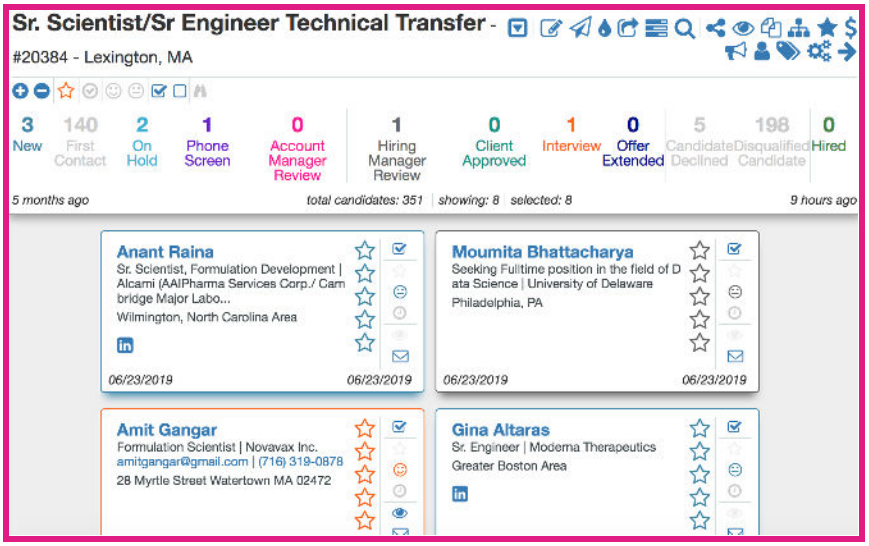
Under the “Add Job” Button, you will be able to add a New Open Role for a Company. To add a New Open Role, it is **required** to fill out the following information: Client, Job Title, Job Title for Ads, Type, Engagement Type, Primary Recruiter, City, State, and Status.

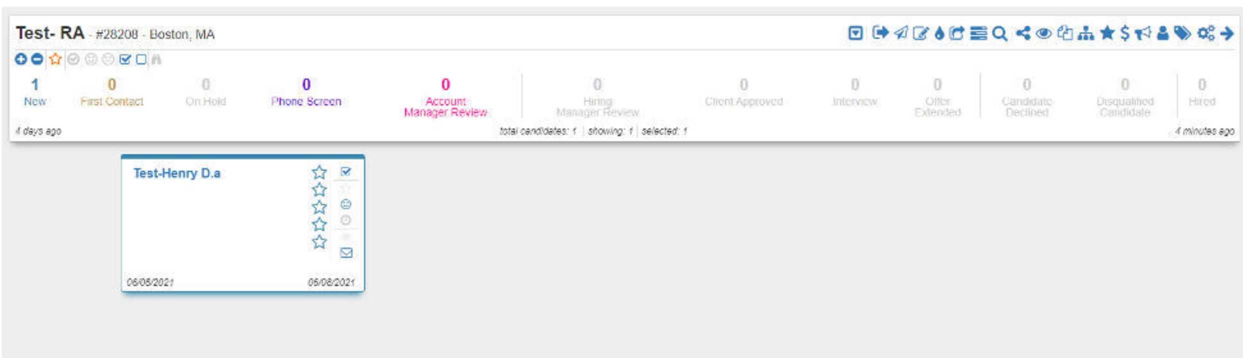
In addition, please provide descriptions of the position under “Job Summary,” “Job Responsibilities,” and “Required Skills & Qualifications”. You may enter a “Client Overview” of the company and any specific instructions for other Sci.bio Recruiters.

Once you are done writing the required information for your New Open Role, click “Add Job” Button in the bottom Right-Hand corner of the screen. Once you click “Add Job,” all information will be saved and may be edited later.

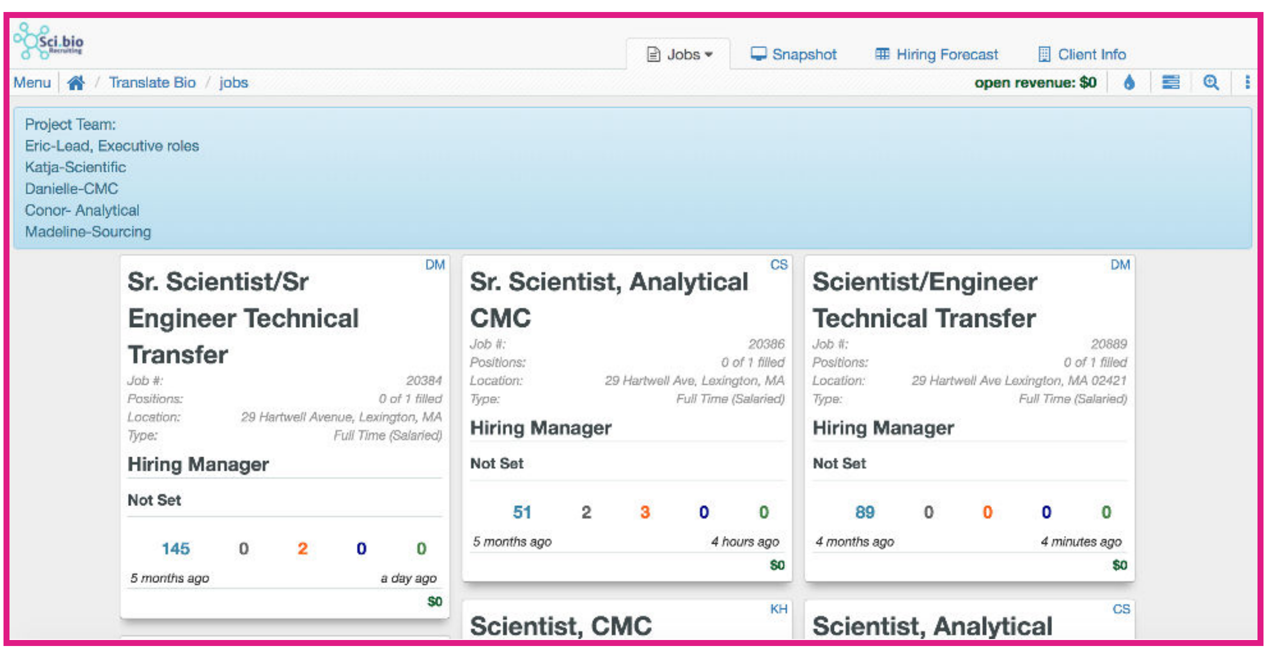


To add a candidate to your job, click on the magnifying glass and add the candidate. They will then appear on the screen below.

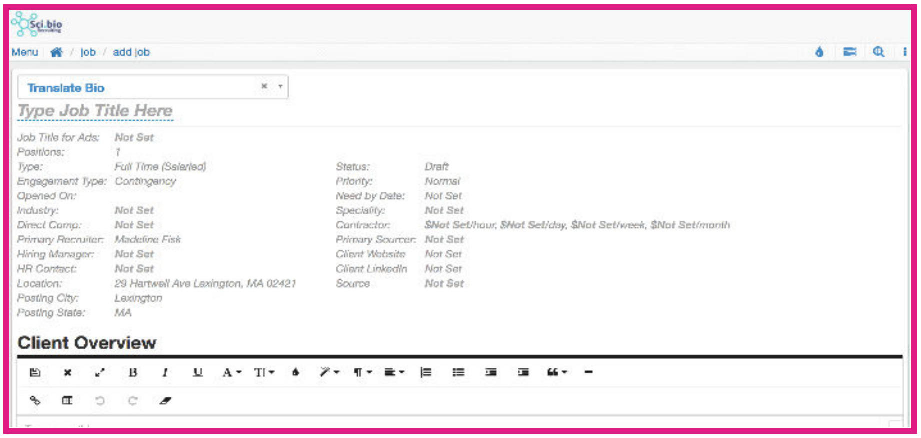


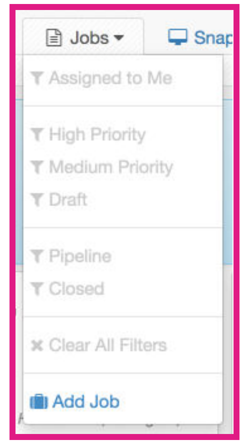


Another way to add a job for a particular client is to go to this screen for the client.



Click on the down arrow on the tabular “Jobs” and then click “Add Job”. It will open a screen displaying the screen below:

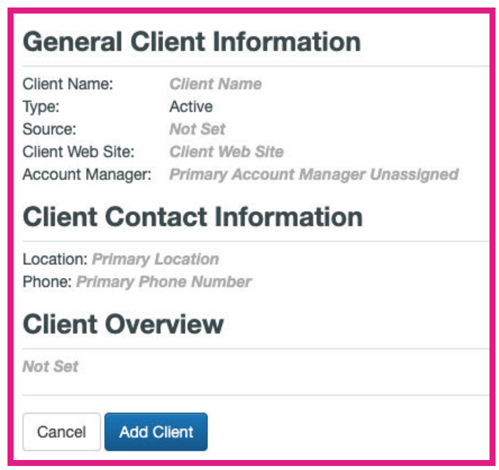




Fill out the Job Title, Job Title for Ads, Type (RPO/Contingency), Primary Recruiter, Location & Status (Draft/Open/Closed). Proceed by filling out the job summary, responsibilities, qualifications and then click “Add Job”.

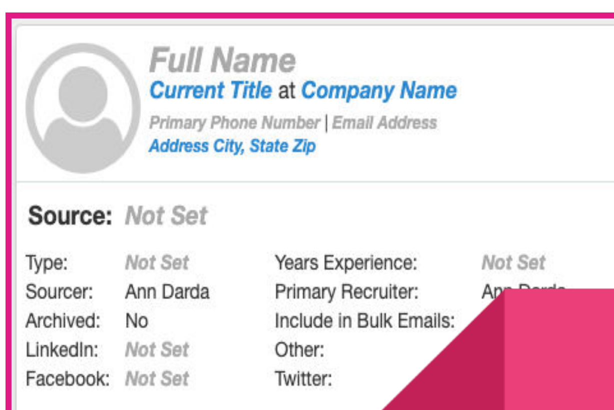
The “Add Client” Button

Using the “Add Client” Button, you can add Clients and their information directly into Kortivity. To add a Client, please fill out the following information: The Client’s Name, Account Manager, Location, and the Client Overview. The Client Overview will be provided by your Client or can be written up by Recruiters using the Company’s information from their Website. Once you are done, click “Add Client.”

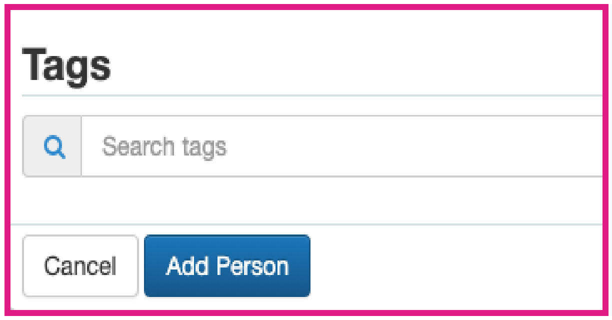


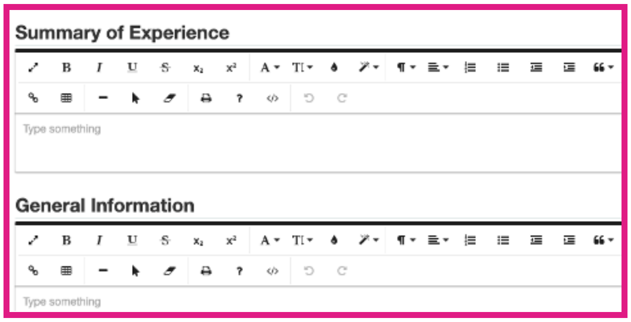
To make an update to the client click into the section you are looking to update and you should be able to edit as needed.

The “Add Person” Button



Using the "Add Person" Button, you can add Potential Candidates and their Information directly into Kortivity. To add an employee from a company, it is **required** to fill out the following information: Full Name, Current Title, Company Name, Phone Number and/or Email, Company Address, Source, and Type. You may fill in a "Summary of Experience," "General Information," and/or "Tags" (this is similar to the layout on the "Add Job" Page). Please note you can upload resumes on this page. When you click on the green Upload Resume button on the bottom right it will parse the resume and add the details. Once you click "Add Person", all information will be saved and may be edited later.

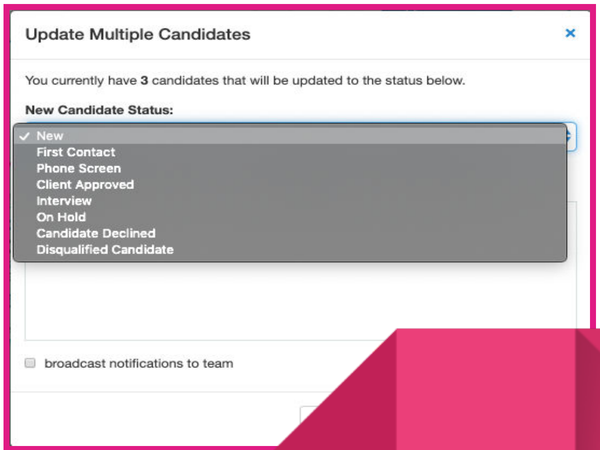




Expanding Open Roles

When you click on an Open Role (as seen on Page 2 under "Understanding the Home Screen"), Kortivity will take you to a new screen that details the Potential Candidates for the Open Role. Another Numerical Flowbar will appear (very similar to the one under the Open Roles on the Home Screen), which denotes the number of candidates at each stage of the recruiting process.

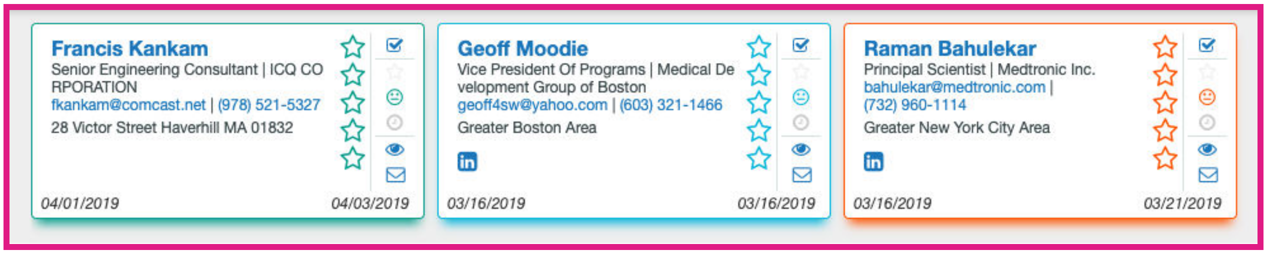
Like the Numerical Flowbar on the Home Screen, the date in the bottom Left-Hand corner denotes when the Job was Opened, and the date in the



bottom Right-Hand Corner denotes when the last activity on the position occurred. The Blue Symbols in upper Right-Hand Corner enable you to do a variety of tasks. The Blue Box with an Arrow Inside allows you to Expand or Collapse Job Details. The Box and Pencil allows you to update Candidates' Status in the Application Process (i.e. how many are at which stage, as seen on the right). The Magnifying Glass allows you to search for Potential Candidates. The Eye allows you to show or hide the details of the Formatted Job Position. The Two Pieces of Paper allows you to create a New Job from a Copy of this Open Position. The Flow Boxes allows you to Manage Positions (i.e. Add an Opening, Close Selected Opportunities, and Remove Selected Opportunities). The Blue Arrow allows you to Show or Hide the Menu to the Right. This Right-Hand Menu shows the Information of Hiring Manager, Human Resources Contact, the Sci.bio Recruiter, and the Kortivity Account Manager. Below this information you can see Recent Activity, any Attachments, and the Primary Job Location.

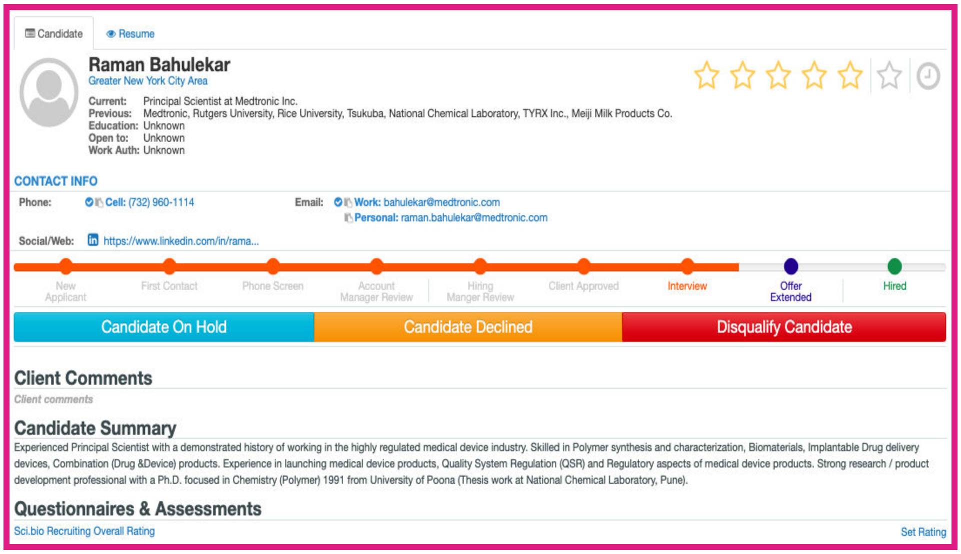
To Toggle between the Different Open Roles for your company, click the Arrows at the top Right-Hand Corner of the Page. When you click the Arrow and Move to Another Open Position, you will see the same Screen Format for your Other Open Positions.

Under the Numerical Flowbar you will find the Candidate Profiles, including their Name, Current Job Information, Contact Information, and LinkedIn Profiles.

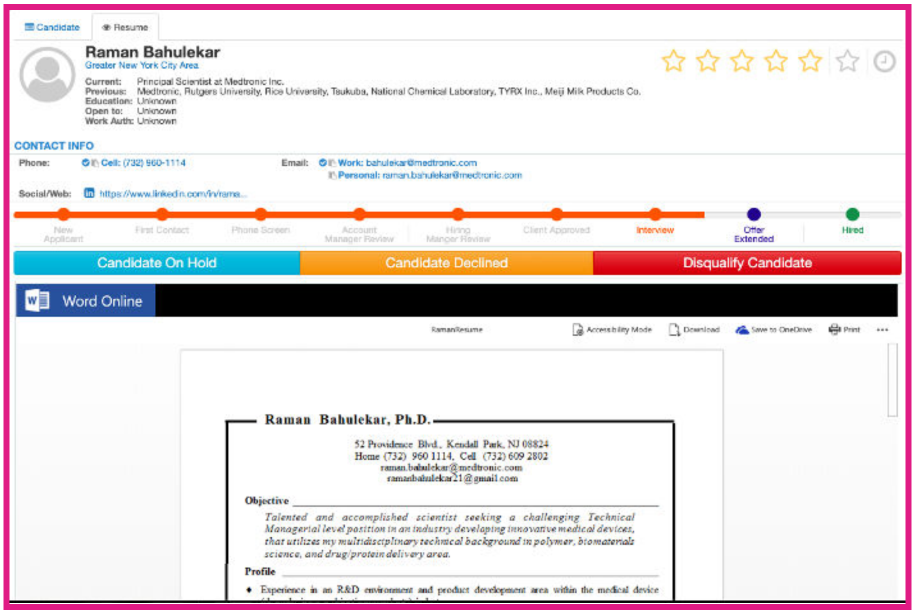


If you wish to sort the Candidate Profiles by Application Date, Candidate Activity, Candidate Star Rating, or Name, you can use the Tool Bar next to the Arrows for Expanding Open Role Details. This Tool allows you to sort your Candidate Profiles by Status in the Application

Process, Application Date, Activity on their Profile, their Star Rating, and Name. The Symbol to the very Right allows you to Toggle between Ascending and Descending Order of Profiles.



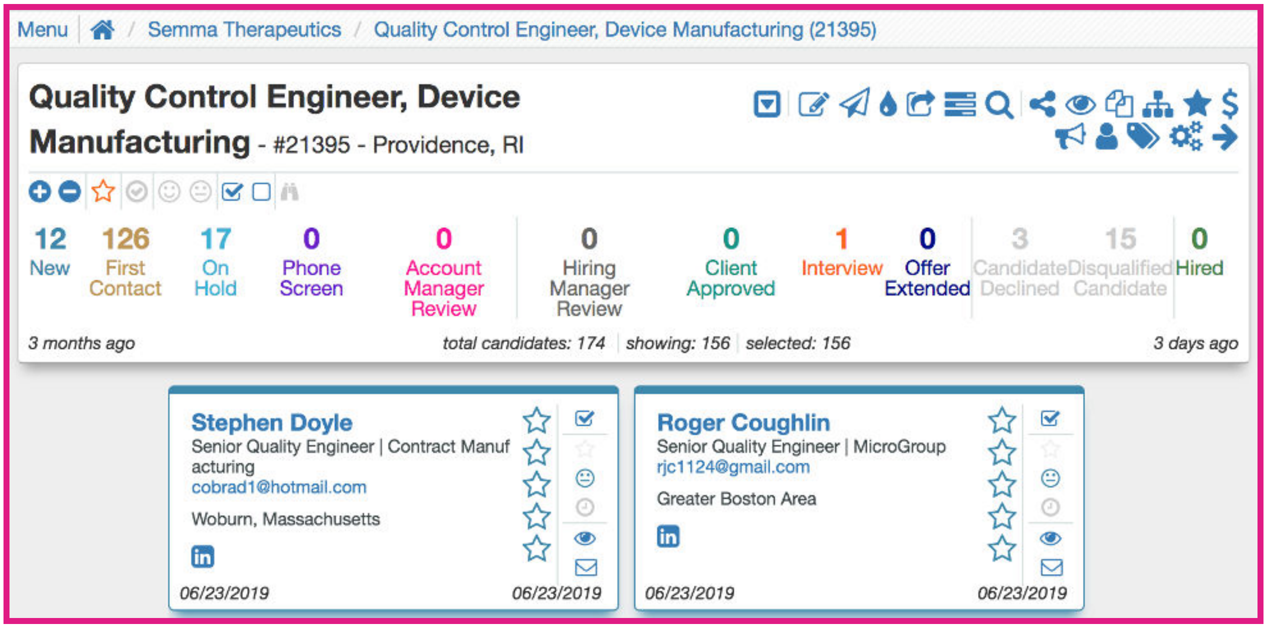
When you Click on a Candidate Profile, you will Expand their Information. There are Two Tabs to view their Profile in the Upper Left-Hand Corner via the Candidate View (shown to the Left) and Resume View (shown on the Next Page). Under Candidate View, you can see the Candidate's Contact Information and a Summary of their Experience, along with Questionnaires and Assessments, and their Interview Schedule. You can also rate the Candidate out of Five Stars in the Upper Right-Hand Corner. In the Center of the Screen will be a Progress Bar that shows you where the Candidate is in the Application Process. You can select any Point in Application Process to place them at by clicking the appropriate Circle. You can also select if the Candidate is "On Hold," "Declined," or "Disqualified." In the Right Menu of the Screen, you can view Recent Activity on the Candidate's



Profile, any Attachments (i.e. the participant's CV and Linkedin Profile), and their potential Commute to the Open Position.

Updating a Prospect

When a prospect, or candidate, is added into a req, they will appear as "New", in blue. A bolder

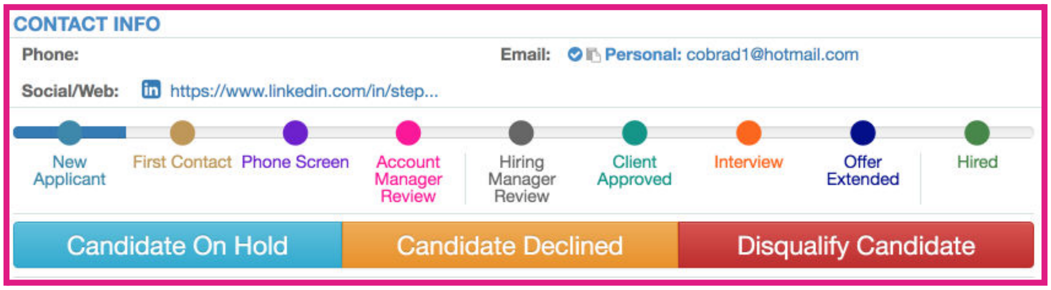


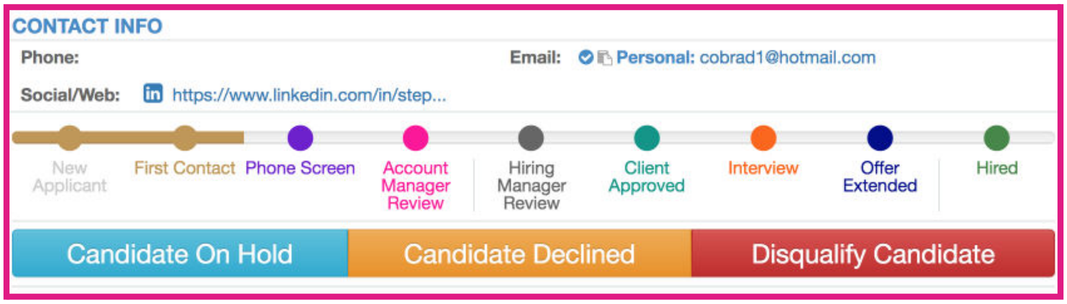
color outline indicates that this record has not yet been opened. There are several icons down the right side of each candidate's card. The check mark is to select them, for example, to bulk update status, or email more than one at a time.

The smiley face indicates whether the candidate is "Active" or "Passive". Active is a smile, meaning the candidate applied for this role directly. A straight mouthed face means the candidate is Passive, and has been manually added to the req by a recruiter or sourcer. This candidate may not actually be interested in the role, so there is a different level of screening that would need to be done.

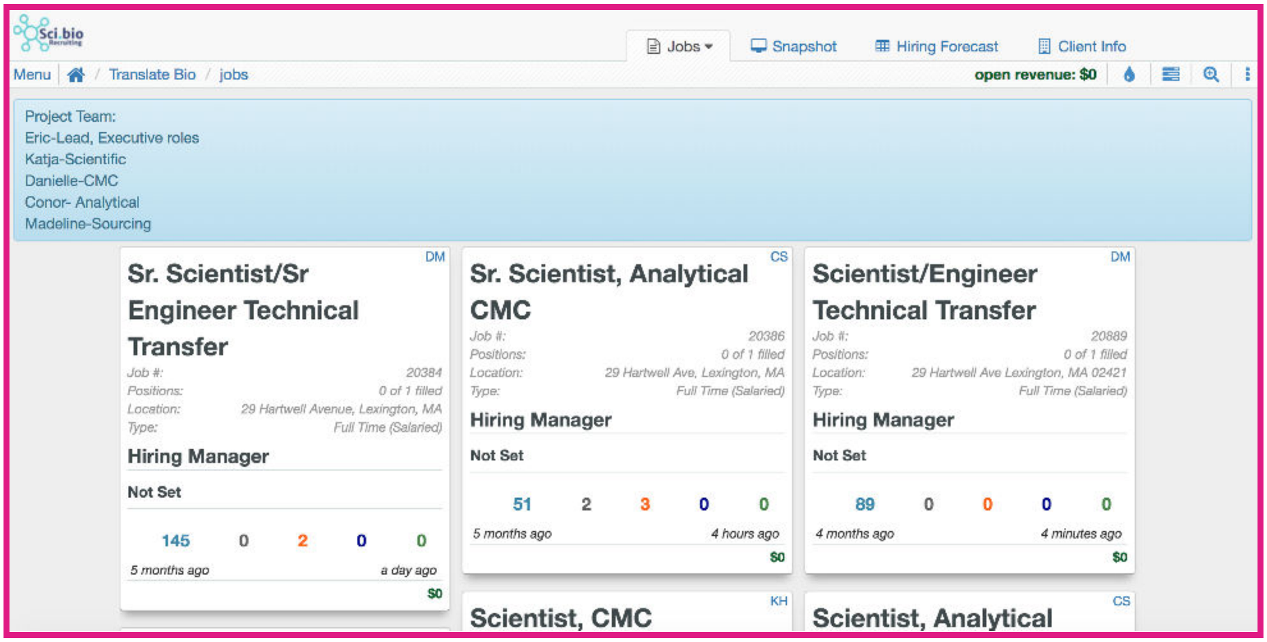
The eye icon opens their resume on the side of the screen, without navigating away from the main job req page.

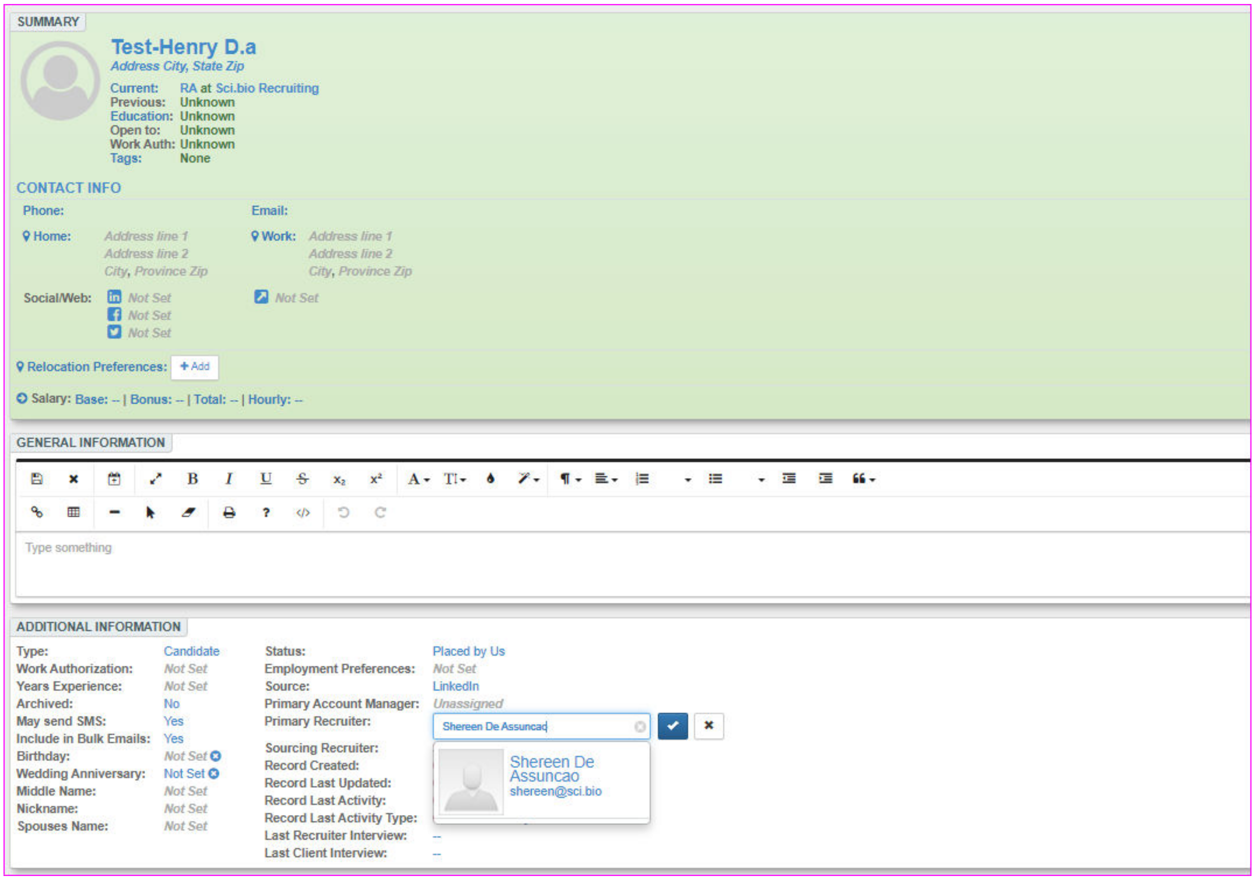
Once you have contacted a prospect, make sure to update them to "First Contact". You can do this by clicking on the prospects profile and updating the flow bar. Click on the "First Contact" and the prospect will be updated. Be sure to do this for every step in the recruitment process, further details are below.





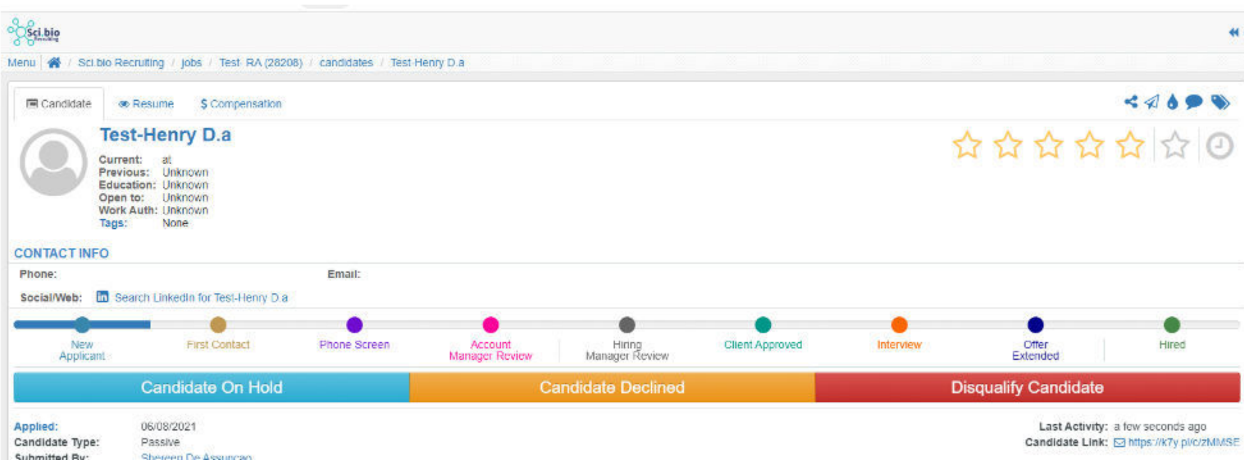
To make an update to the candidate record, click on the blue text and a box will populate to make changes.



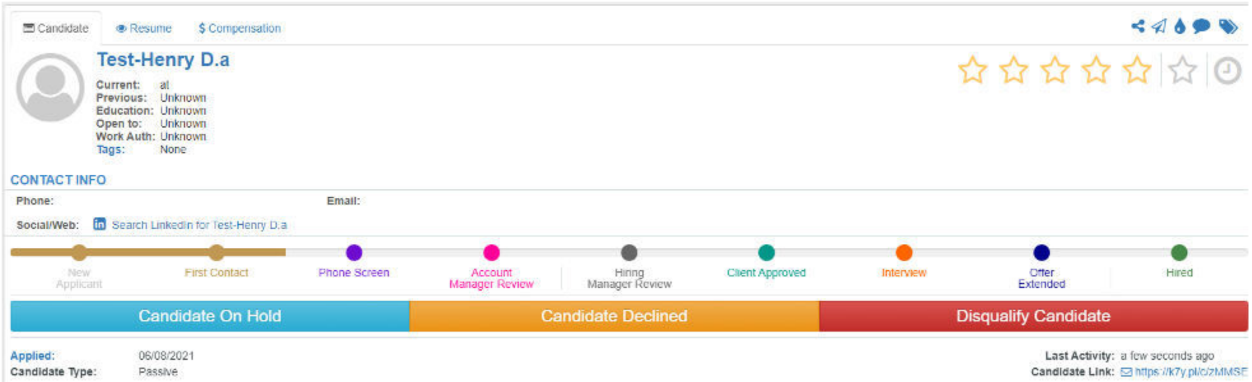


Moving a Candidate Through the Stages to Hire Stage

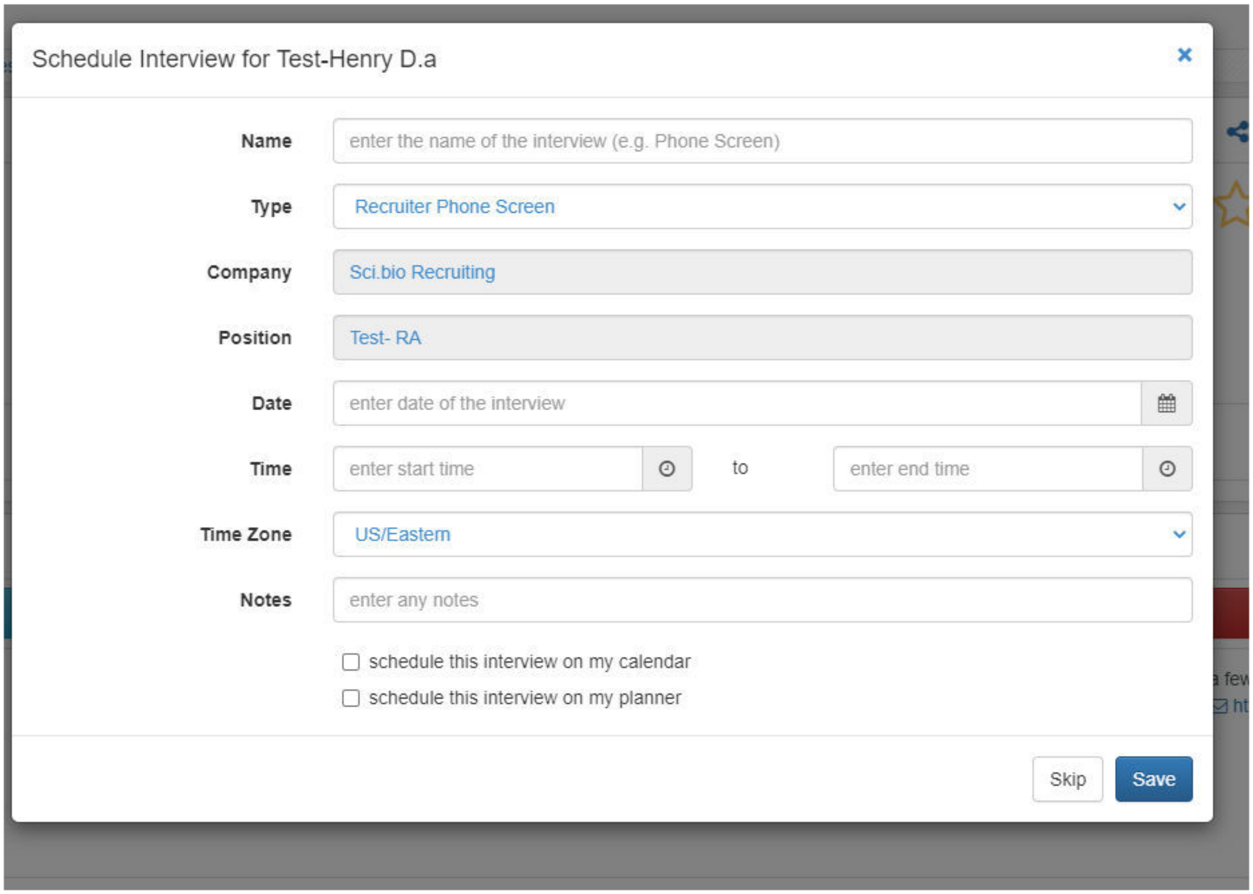
When a candidate is first entered on a job they will be in the “New Applicant” stage.



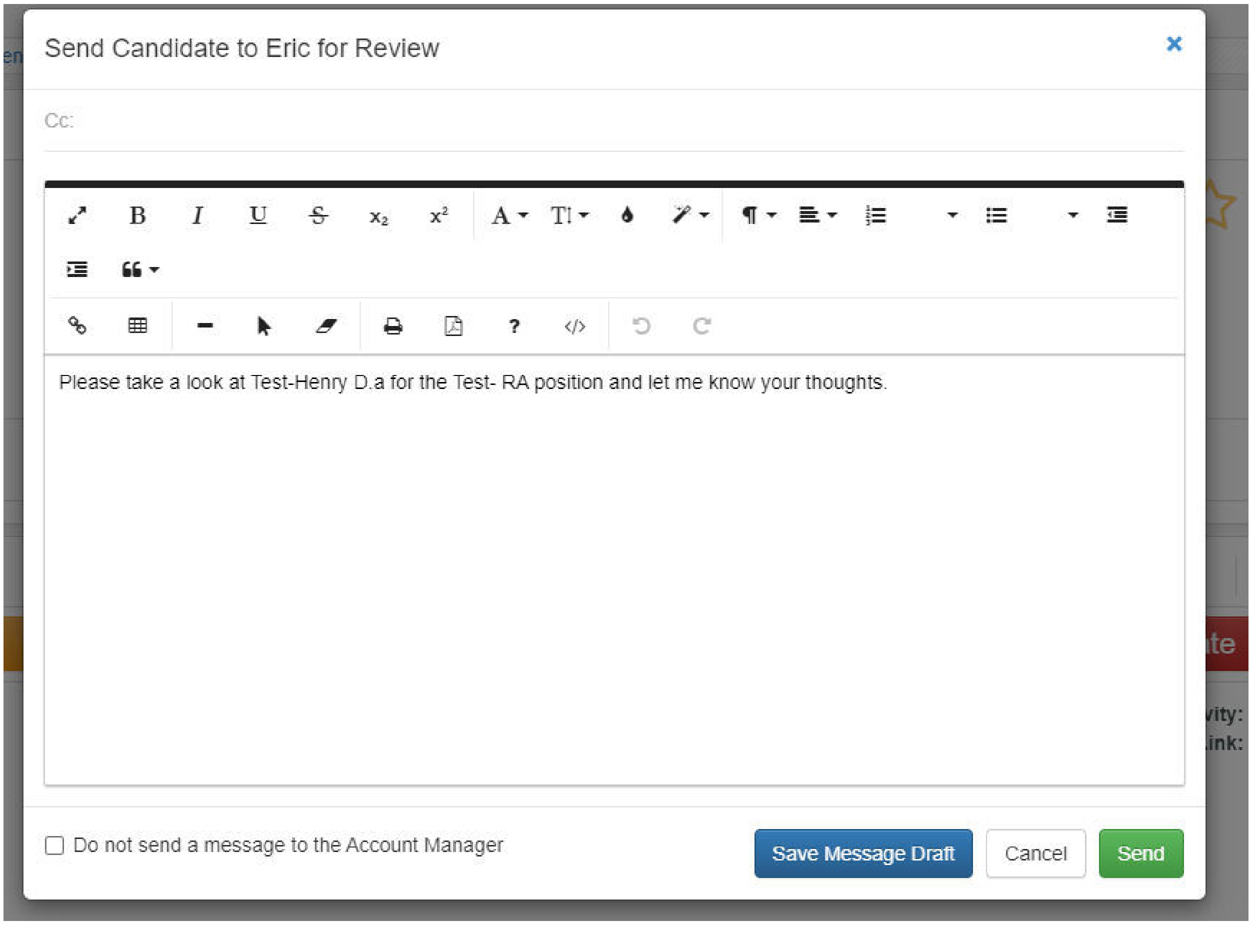
Once you have communicated with the candidate you can click on “First Contact” and you will see the candidate move through the stages.



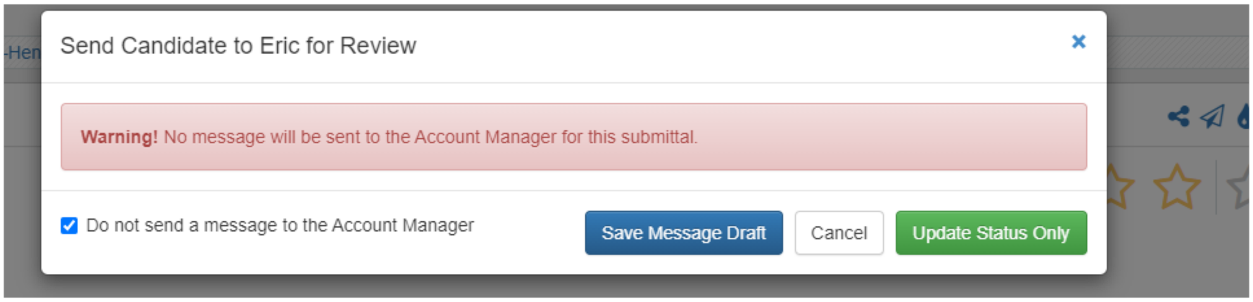
When you click on “Phone Screen” you will see the following screen.



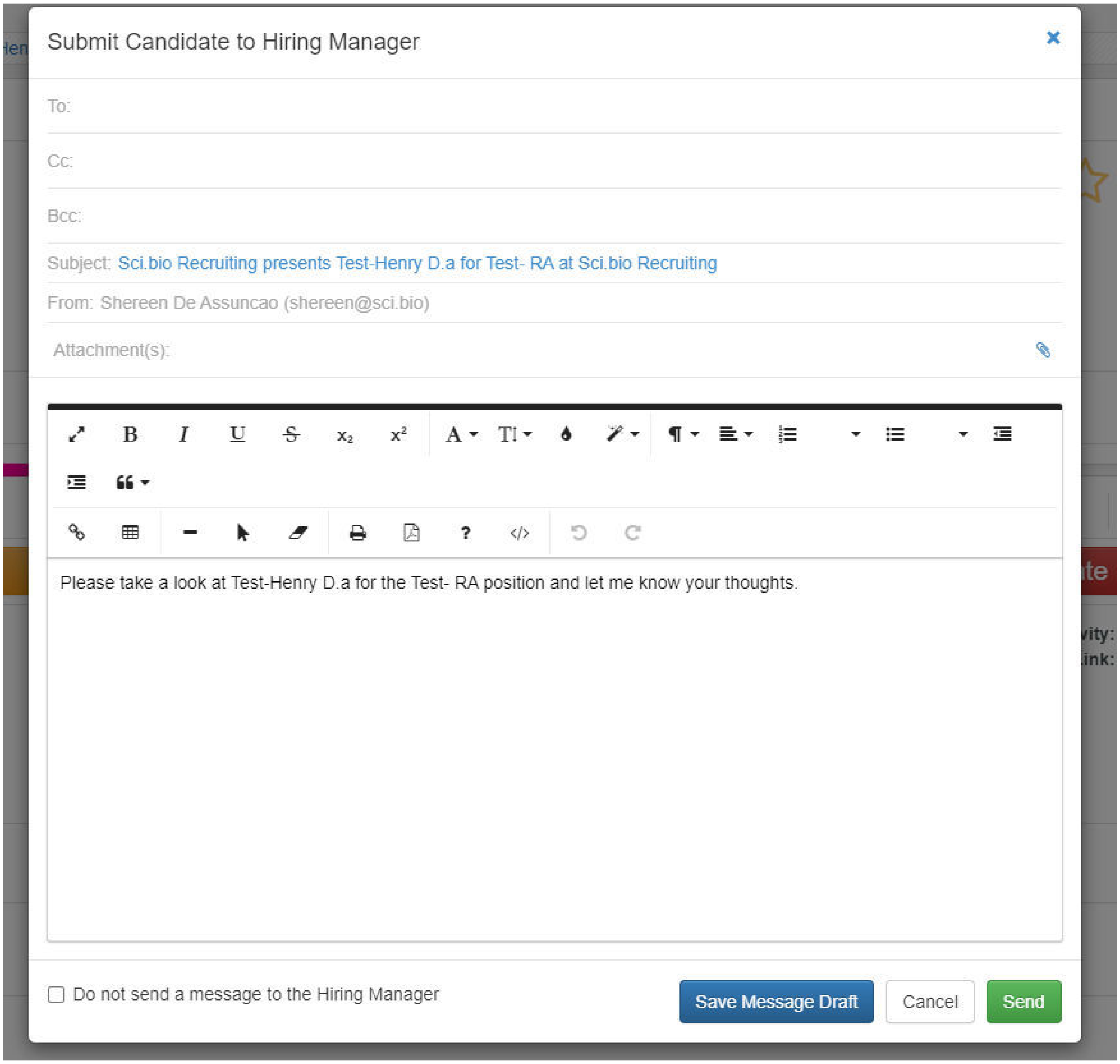
When you click on Account Manager Review, an email template will appear. You also have the option to not send at the bottom of the screen.



To not send a message, confirm you will be updating the status only.

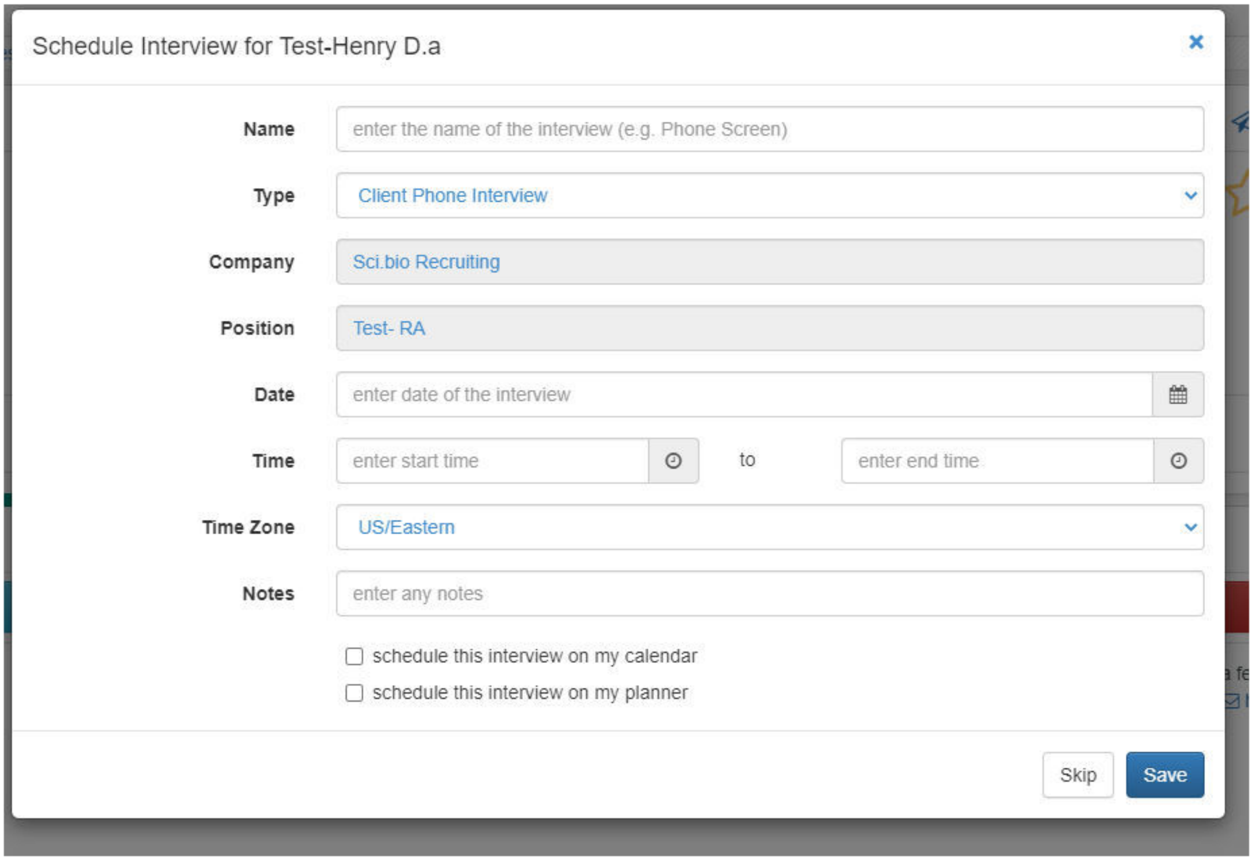


When you click on "Hiring Manager Review" an email template will appear to send. Edit as needed. Once again you have the option to not send a message at the bottom of the screen.

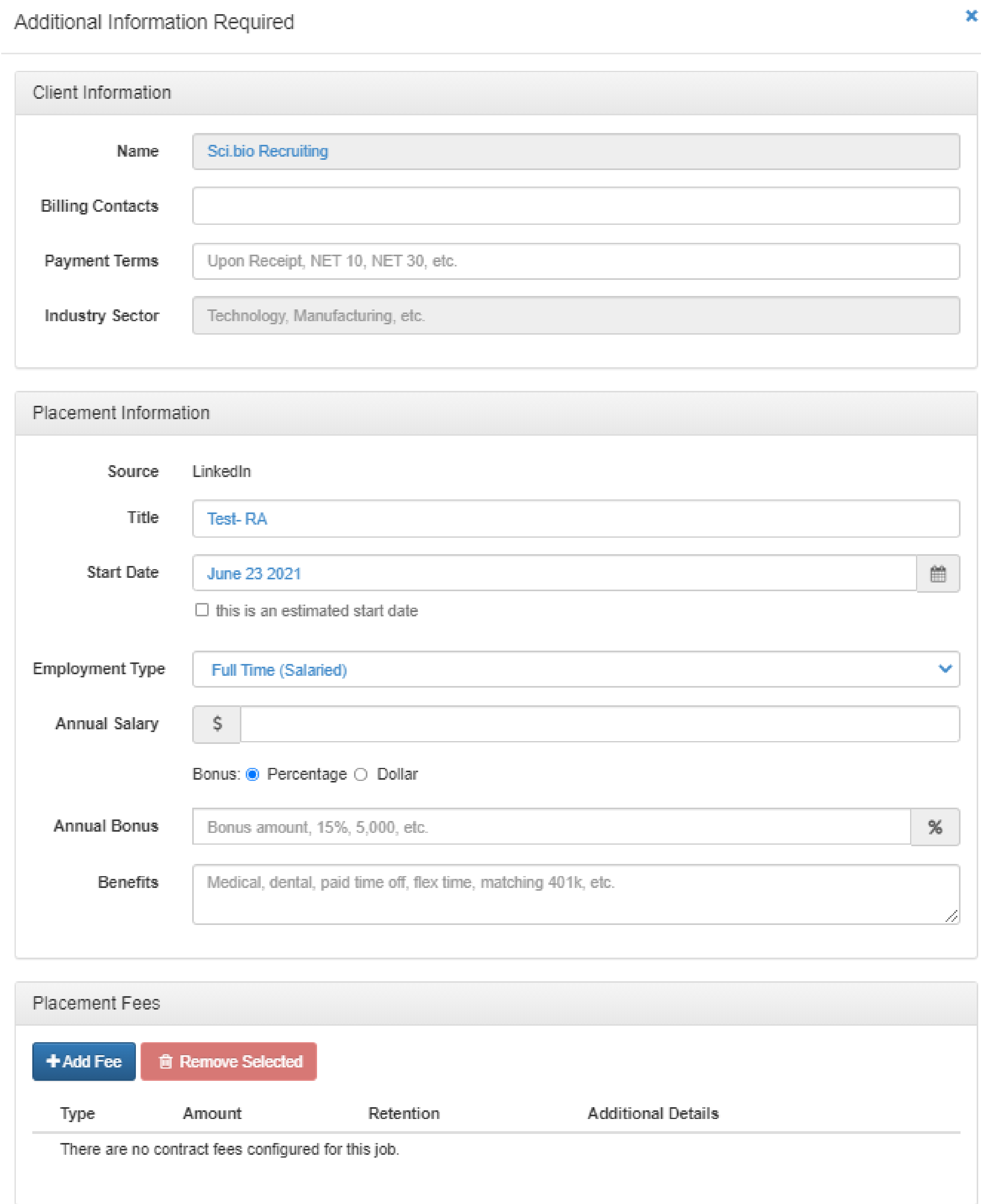


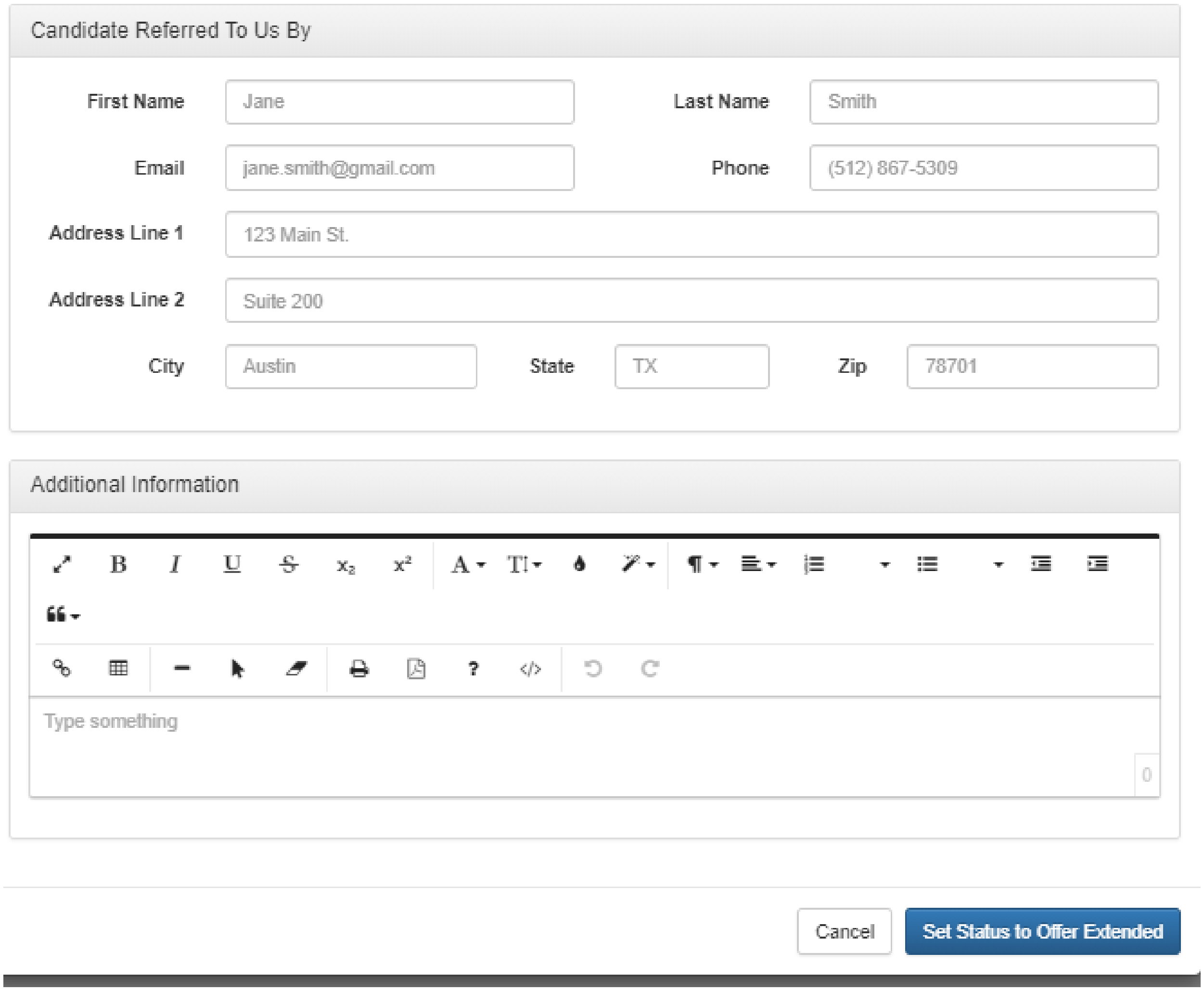
When you click on "Client Approved" no screen will populate and the candidate will be moved forward.

When you click on "Schedule Interview." Enter relevant details. You will have the option below to add to your planner and calendar.

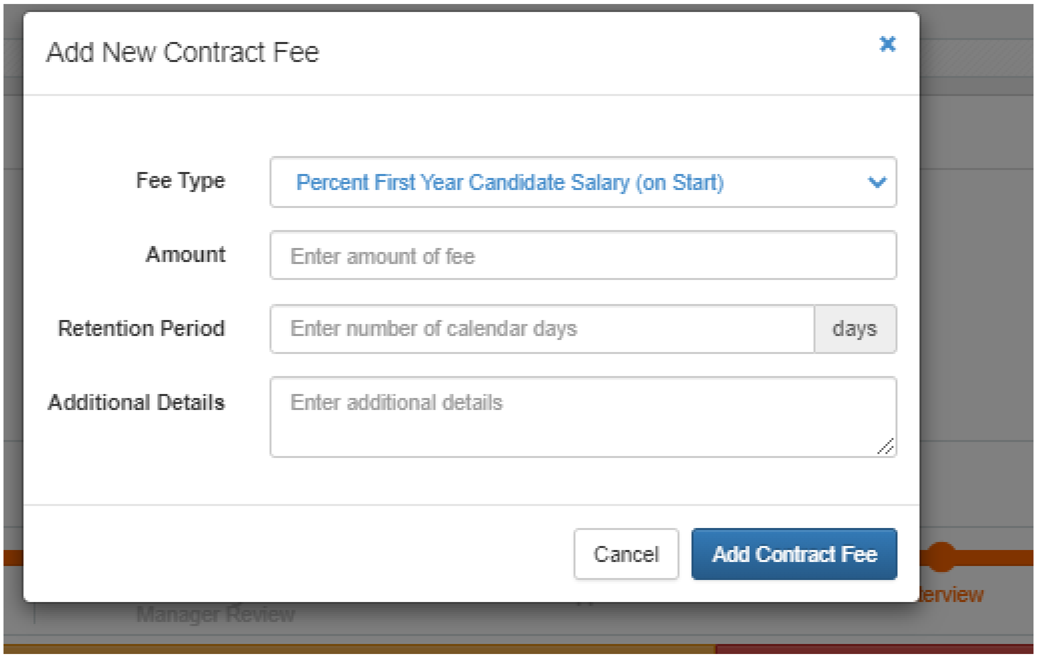


When you click “Offer Extended” you will see additional information required. Enter relevant details.

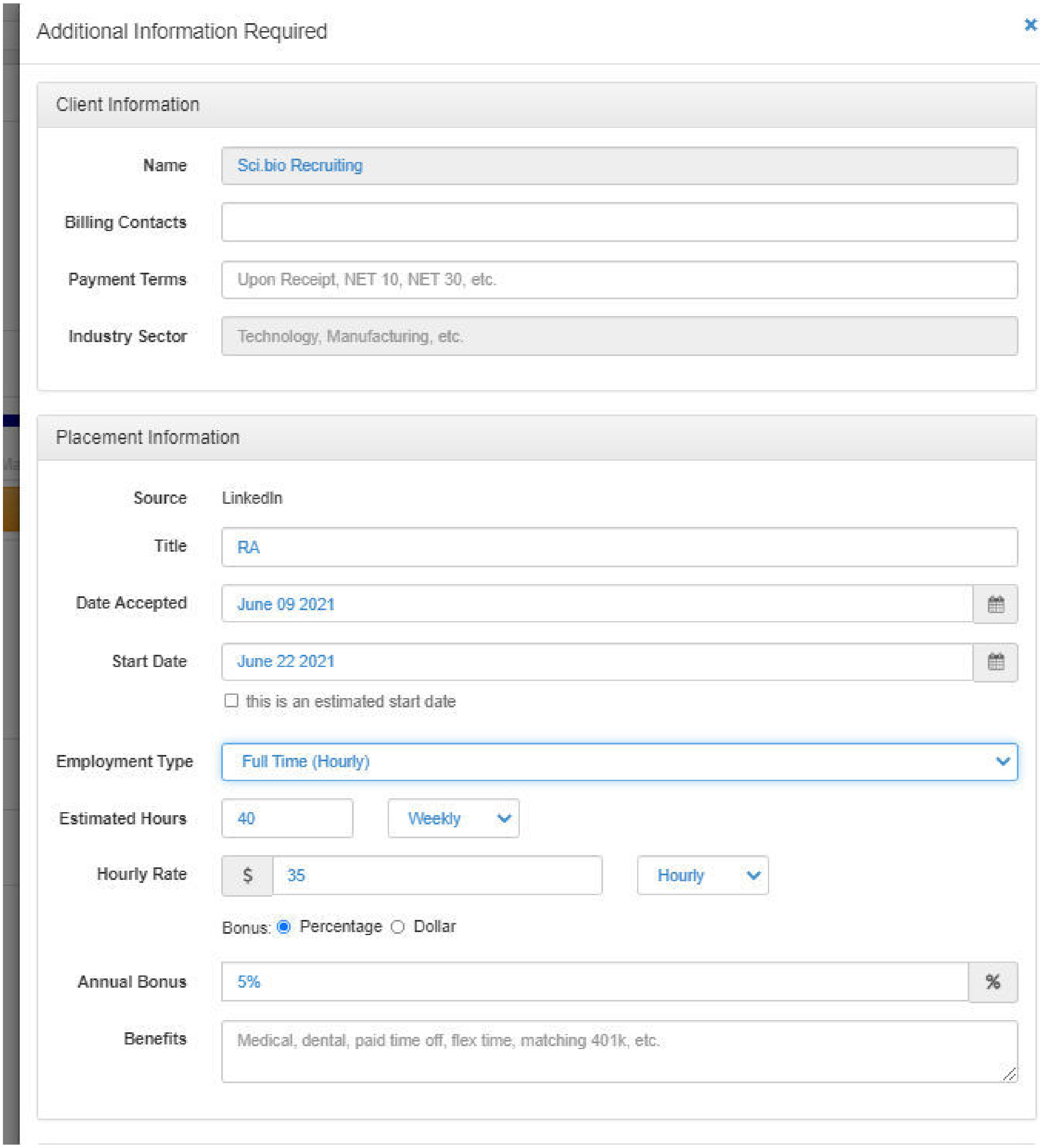

Additional Information Required
Client Information
Name
Sci.bio Recruiting
Billing Contacts
Payment Terms
Upon Receipt, NET 10, NET 30, etc.
Industry Sector
Technology, Manufacturing, etc.
Placement Information
Source
LinkedIn
Title
Test- RA
Start Date
June 23 2021
this is an estimated start date
Employment Type
Full Time (Salaried)
Annual Salary
$
Bonus: Percentage Dollar
Annual Bonus
Bonus amount, 15%, 5,000, etc.
%
Benefits
Medical, dental, paid time off, flex time, matching 401k, etc.
Placement Fees
+ Add Fee
Remove Selected
Type
Amount
Retention
Additional Details
There are no contract fees configured for this job.

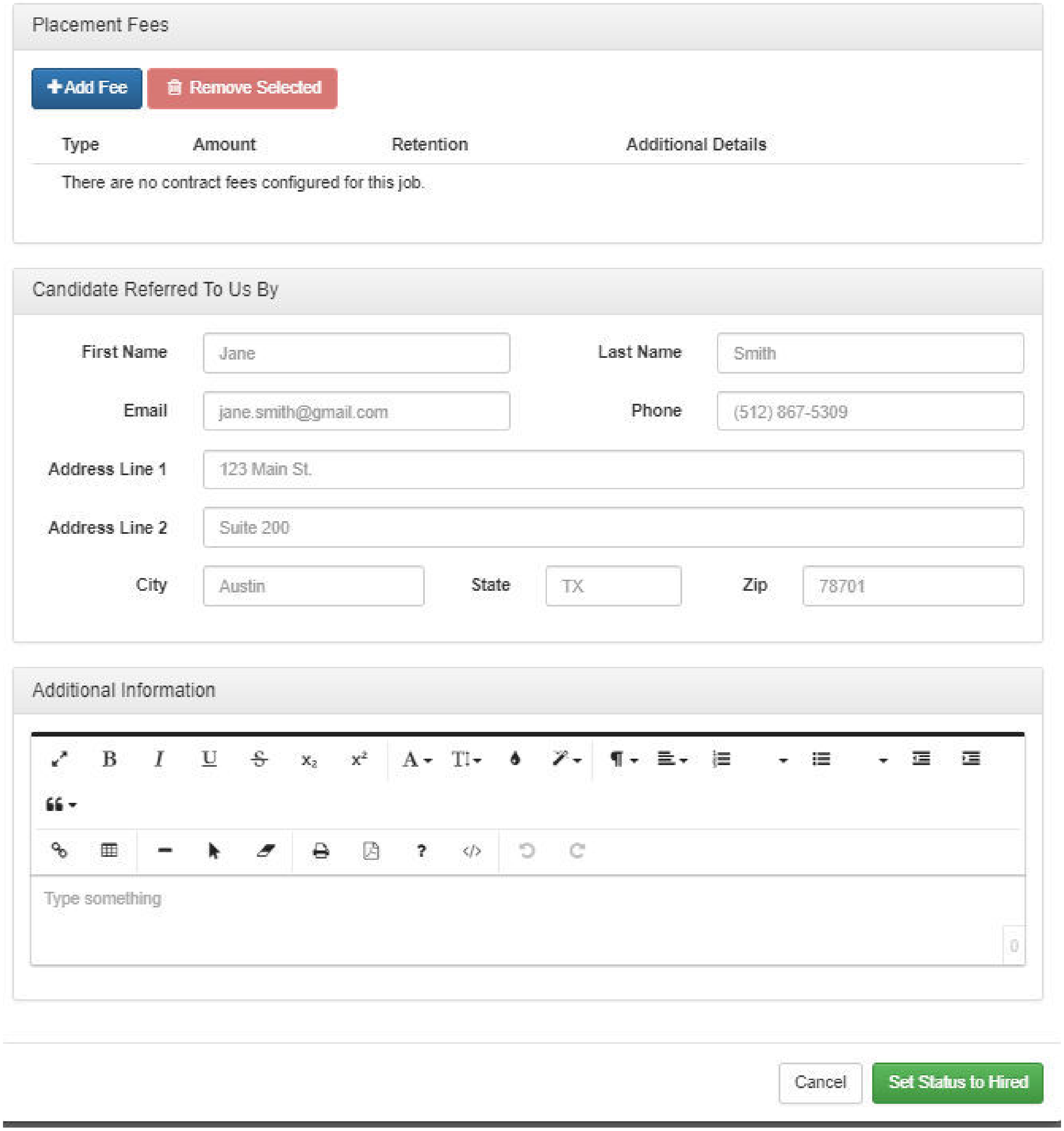


Click Add fee to add details for the contract fee.



The same screen will appear to confirm if there have been any changes. Confirm any changes. And click “Set to Hired”


Additional Information Required
Client Information
Name
Sci.bio Recruiting
Billing Contacts
Payment Terms
Upon Receipt, NET 10, NET 30, etc.
Industry Sector
Technology, Manufacturing, etc.
Placement Information
Source
LinkedIn
Title
RA
Date Accepted
June 09 2021
Start Date
June 22 2021
this is an estimated start date
Employment Type
Full Time (Hourly)
Estimated Hours
40
Weekly
Hourly Rate
$
35
Hourly
Bonus: Percentage Dollar
Annual Bonus
5%
%
Benefits
Medical, dental, paid time off, flex time, matching 401k, etc.


Placement Fees
Add Fee
Remove Selected
Type
Amount
Retention
Additional Details
There are no contract fees configured for this job.
Candidate Referred To Us By
First Name
Jane
Last Name
Smith
Email
jane.smith@gmail.com
Phone
(512) 867-5309
Address Line 1
123 Main St.
Address Line 2
Suite 200
City
Austin
State
TX
Zip
78701
Additional Information
Type something
Cancel
Set Status to Hired

The “Send Feedback” Button

The “Send Feedback” Button allows you to send Feedback to the Kortivity Developers and Programmers who work to improve the system. If you ever have any suggestions (i.e. a button or tool to make things easier) please write them in this box and click “Send.” This Kortivity Feature also allows you to upload Screenshots and other Files that may be helpful to program developers (up to Three Files).

Installing the Sci.bio Chrome Tool

The Sci.bio Chrome Tool will help you with Sourcing via Linkedin. Specifically, it will allow you to upload Potential Candidates from Linkedin to Kortivity without having to manually upload anything into the system.

To Download the Chrome Tool, you will need to download the file **the Chilca and Likor tool** from the Google Drive (this will be shared with you your first week of working for Sci.bio via Google Drive; if you have any problems finding this file, you can find it under the Google Drive “Team Folder” under the folder “Technology Tools”). Once this file is shared with you, click “download.” Once it is fully downloaded, open Google Chrome and in the Upper Right-Hand Corner of the Screen, click the Three Vertical Dots. Once you click the Three Vertical Dots Button, it will open a menu with options. Click “More Tools” and from there click “Extensions.” It will then bring you to the Google Chrome Extensions Page. Once you are on that page, click “Load Unpacked.” This will bring you to a screen where you should select the downloaded zip file wherever it has been saved to your computer. Once you click that and press “Select,” the Sci.bio Chrome Tool will appear in its own box on the Extensions page. Make sure to slide the Blue Circle in the Blue Bar to the Right so it is Blue and not Gray (this means it is visible on your Chrome Browser).

Questions and Contacts

If you experience any Technical Difficulties Accessing or Using Kortivity, please contact Shereen De Assuncao or Allison Ellsworth.