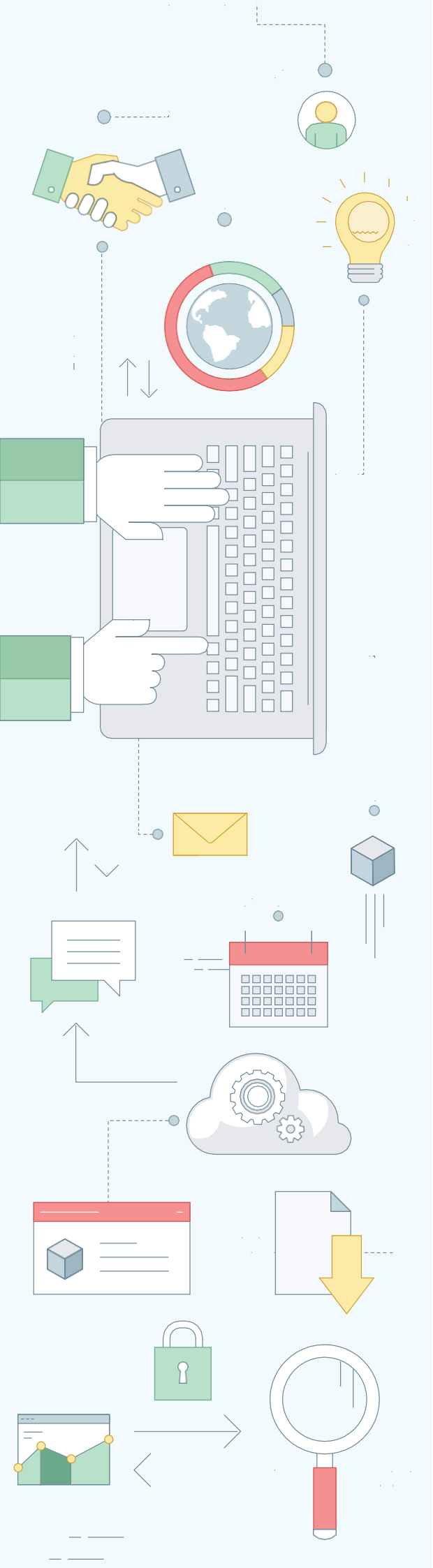


experium

RECRUITING AGENCY

QUICK USER'S GUIDE

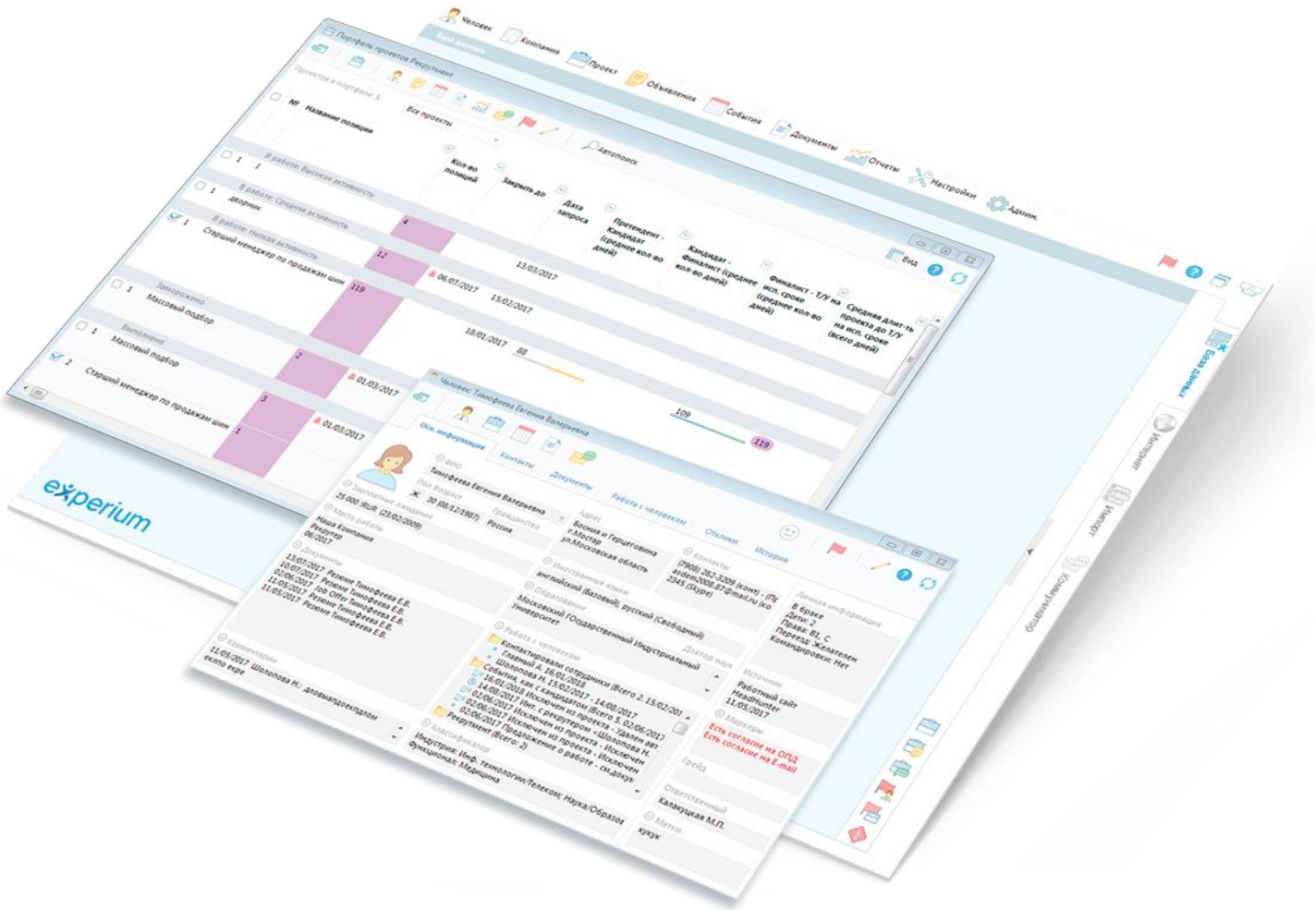
www.experium.ru

CONTENTS

EXPERIUM GREETS YOU!

We are glad you have decided to learn our program. It will not take much time, but will give you a great profit in your further work. As soon as you learn how to work in Experium Software, you will find out that recruitment process can be easier and more interesting!

Enjoy the learning and welcome to the world of Experium!



PROGRAM STRUCTURE

The main window of the program consists of the following parts (Fig. 1):

- **control panel** – is located in the upper area of the window;
- **windows manager** – is located in the right side of the screen. All the opened and minimized program windows are displayed in the "Windows manager";
- **workspace** – occupies almost all the visible area of the window and is located under the control panel.

Workspace consists of several tabs:

1. **«Database»** – the main workspace is opened;
2. **«Internet»** – an inbuilt Internet browser is opened;
3. **«Import»** – the window for import of documents, tabs, ads, replies, company structures, data on the employees, users and ratings to the database is opened;
4. **«Communicator»** – day planner is opened.
5. **"Dashboards"** - the designer opens with the ability to create dashboards.

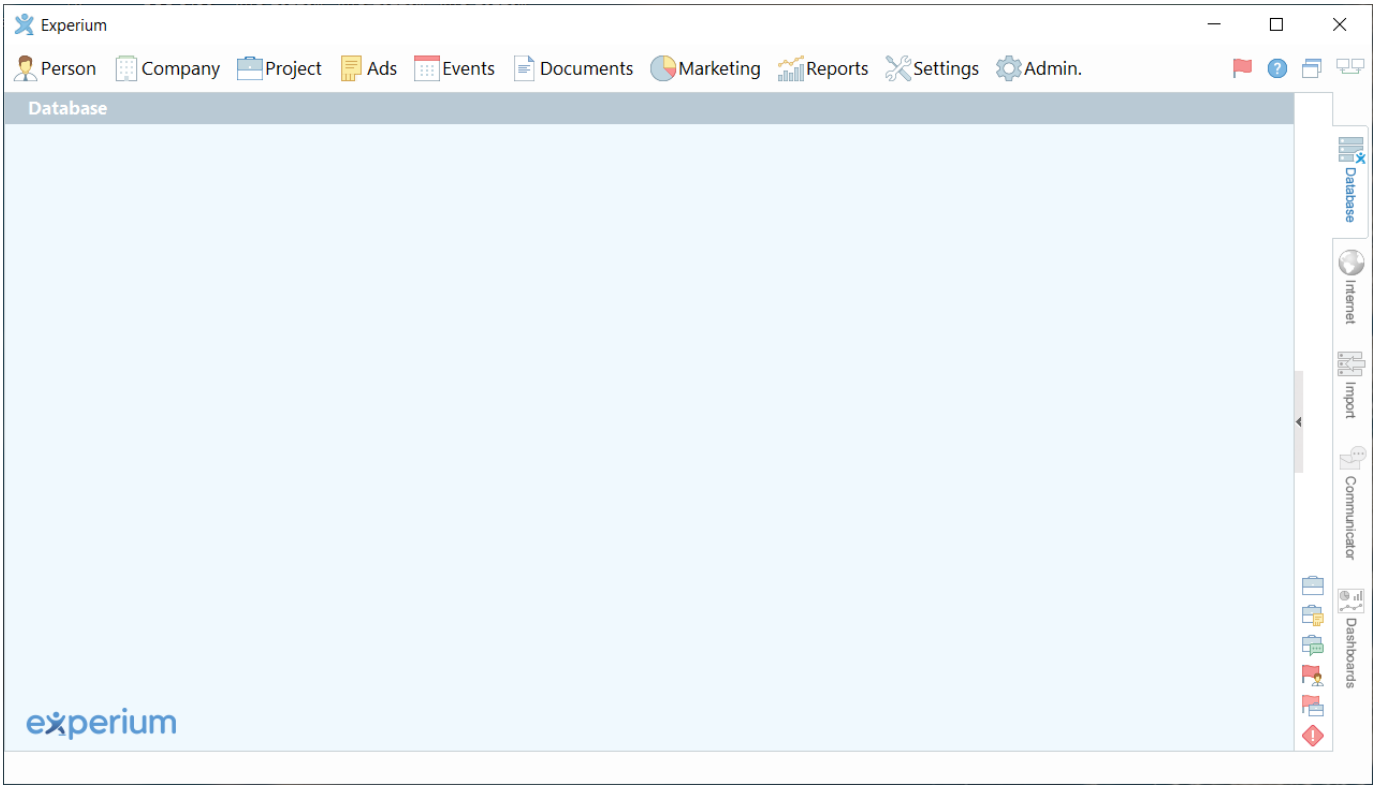


Fig. 1. Main program window

PROGRAM STRUCTURE

Experium consists of three main and three additional databases.

Main

database of people;

database of companies;

database of projects;

Additional

database of ads and replies;

database of events;

database of documents.

Besides the databases above, there are additional opportunities in Experium that simplify employees' work:

marketing contact (summery);

reports;

logins and passwords, program settings;

users and permissions setting;

people and project approval;

instruction and information about Experium version;

actions with open windows;

data server connection status.

PROGRAM STRUCTURE

"Windows manager"

In **"Windows manager"** all opened and minimized program windows are displayed.

For opening "Windows manager":

click left mouse-button anywhere on the white field in the right part of the screen.

For locking "Windows manager":

click in its upper left corner on the button **"Lock"**. **For closing "Windows manager"**

click left mouse-button anywhere on the workspace.

There are the following buttons in **"Windows manager"**:

- **"Projects portfolio"** – list of user's vacancies is displayed in the workspace;
- **"Ads portfolio"** – list of user's ads is displayed in the workspace;
- **"Replies portfolio"** – list of people whose replies were imported to the database is displayed in the work- space;
- **"People approval list"** - list of people sent for approval to the other users as well as incoming requests for approval is displayed in the workspace.
- **"Projects approval list"** – list of incoming and outgoing vacancies for approval is displayed in the workspace.
- **"Not done"** – window with a list of scheduled events, the results of which have not been entered on time is displayed in the workspace.

PERSON'S CARD

Person's card consists of the following parts (Fig. 2):

- **Control panel** – is located in the upper area of the card.
- **A set of tabs:**
  - General information;
  - Contacts;
  - Documents;
  - Work with person;
  - Responses;
  - History.

Person's card can be created in two ways:

1. Through the program control panel:

Click the button **"Person"** and in the drop-down menu select the command **"New person card"**. After filling in all the required fields save the entered data.

2. With the help of Extra services **"CV parsing"** or **"Data import"**[1].

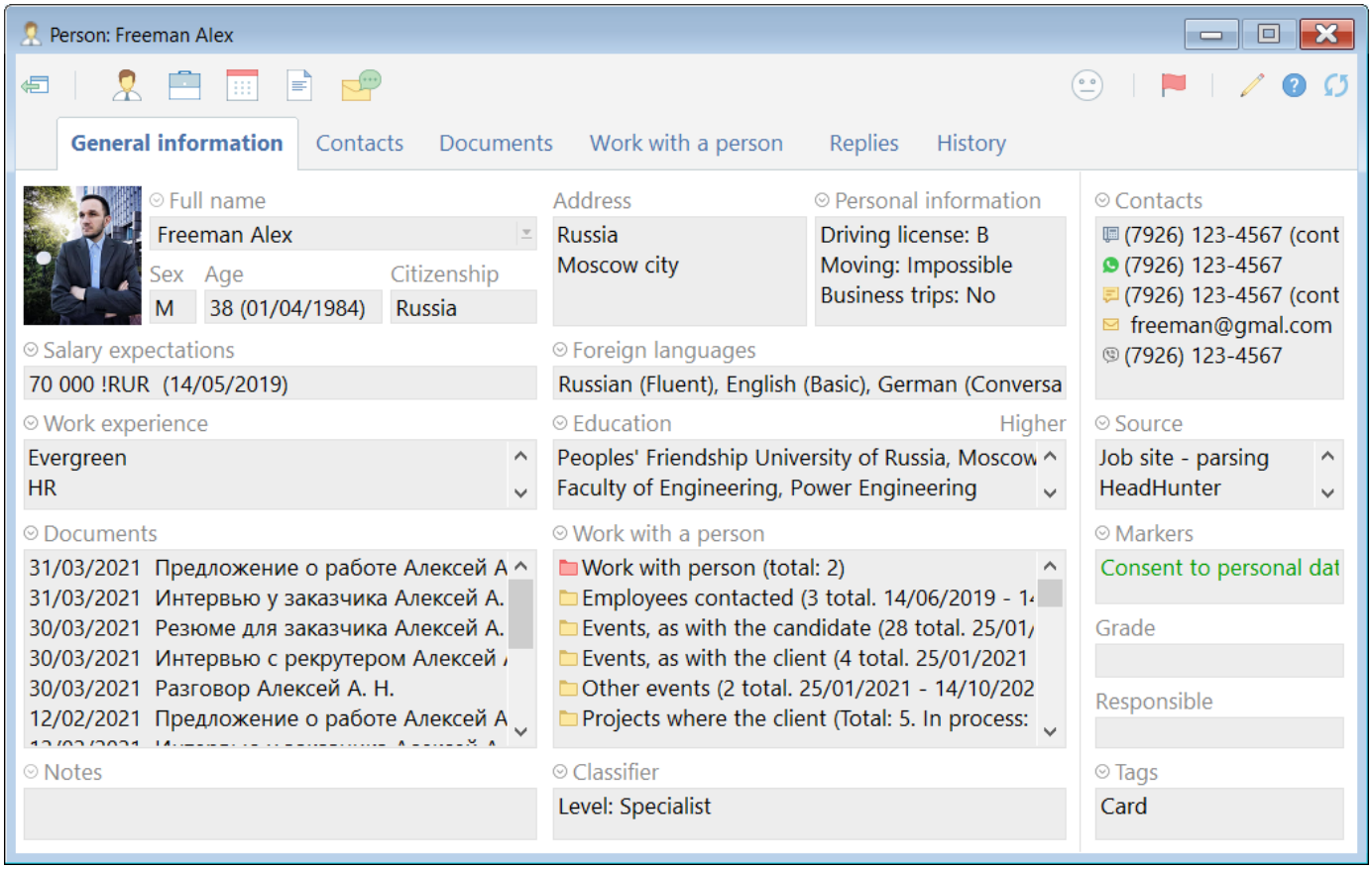


Fig. 2. Person's card

[1] see **"Extra services"**.

COMPANY'S CARD

Company's card consists of the following parts (Fig. 3):

- **Control panel** is located in the upper area of the card;
- **A set of tabs:**
  - General information;
  - Work;
  - Contacts and Structure;
  - Documents;
  - Employees;
  - History.

Company's card is created through the control panel of the program:

click the button **"Company"** and in the drop-down menu select the command **"New company card"**. After indicating the company type and filling in all the required fields save the entered data.

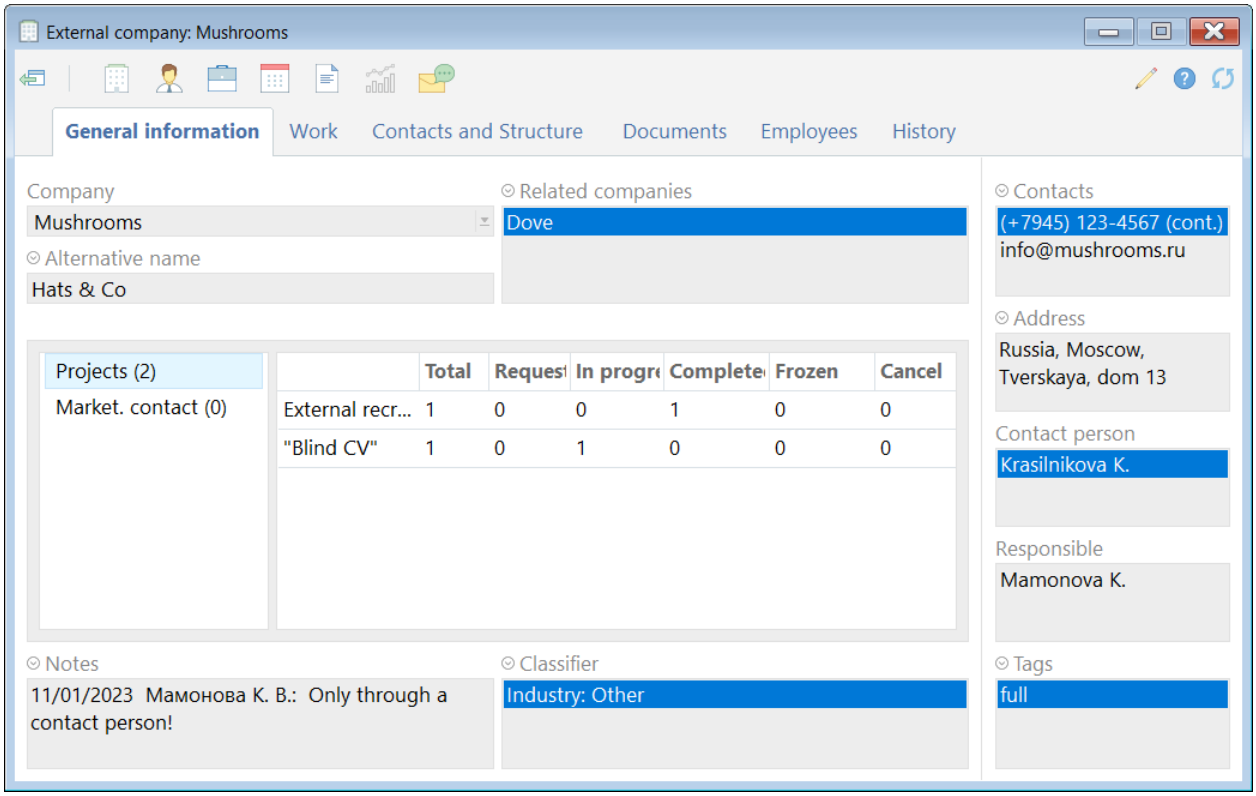


Fig. 3. Company's card

Project's card

The project's card "External recruitment" / "Internal recruitment" consists of the following parts (Fig. 4):

- **Control panel** is located in the upper area of the card;
- **A set of tabs:**
  - General information;
  - Documents;
  - Request;
  - Work on project;
  - Ads & replies;
  - History.

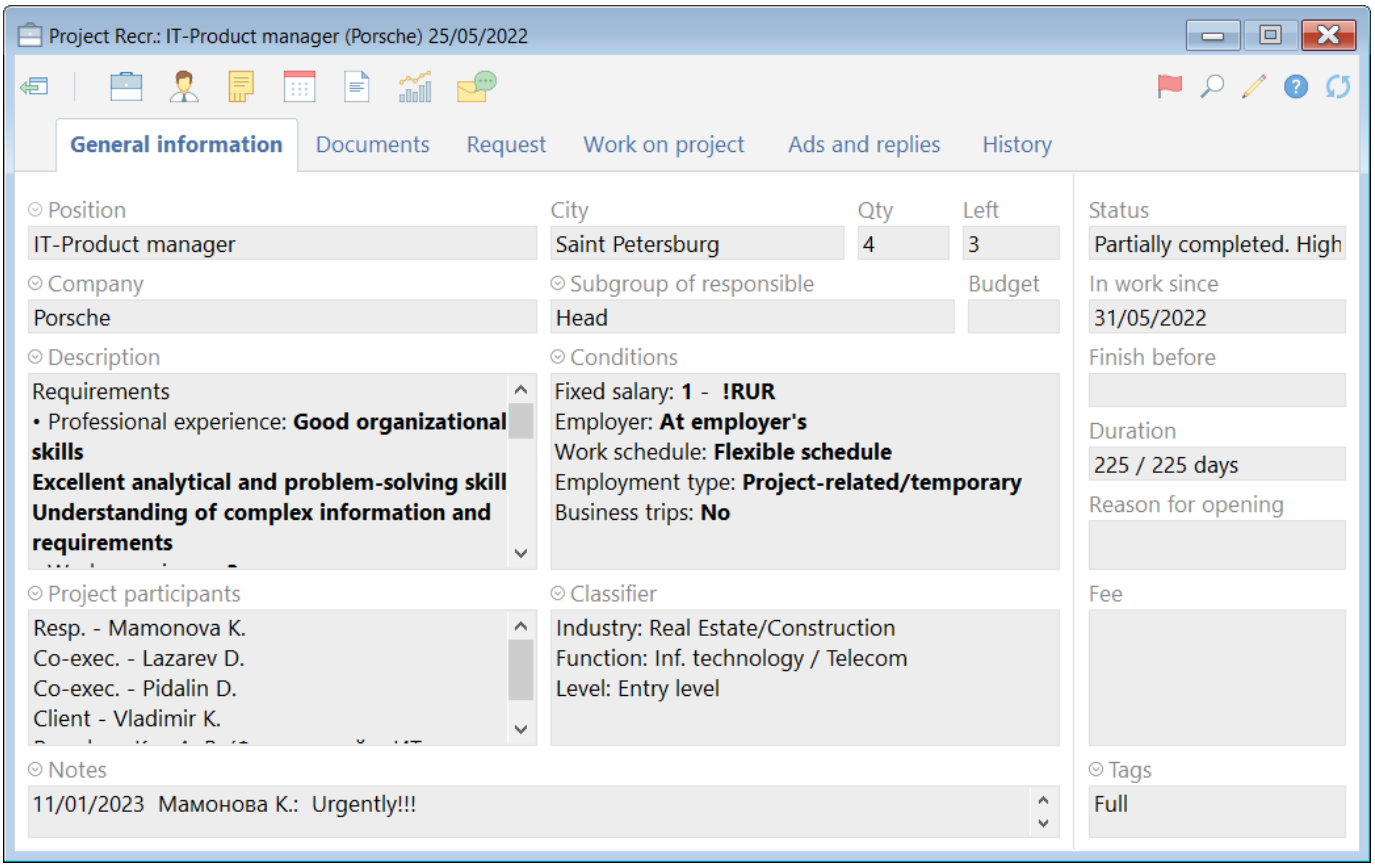


Fig. 4. Project's card

EXTERNAL AND INTERNAL RECRUITMENT

The project card can be created in several ways:

1. **Through the control panel of the program:**

On the control panel of the program click the button **"Project"** and in the drop-down list select the command **"New project"**. In the opened window indicate a recruitment type **"External recruitment"**, **"External recruitment (TR)"** or **"Internal recruitment"** and click **"OK"**. The window for creation **Project card** will open.

2. **Through the card of your company:**

in the company card click the button **"Project"** and in the drop-down menu select the command **"New project"**. In the opened window indicate a recruitment type **"External recruitment"**, **"External recruitment (TR)"** or **"Internal recruitment"** and click **"OK"**. The window for creation **Project card** will open.

3. **With the help of the extra service "Data import"**[2].

Recruitment types:

1. **Recruitment**

Person's project statuses:

Pre-candidate> Candidate -> Finalist -> Employed on probation -> Employed.

A transfer of a person from one status to another is performed gradually, i.e.:

- A Pre-candidate can be transferred only to Candidates.
- A Candidate – only to Finalists.
- A Finalist – to Employed on probation or to Employed.

While transferring the Finalist to the Employed a "Job offer" document is to be attached.

Scheduling events to people, attaching documents to their cards and sending e-mails can be performed separately for each person.

2. **Typical recruitment**

Person's project statuses:

Pre-Candidate -> Candidate -> Employed on probation -> Employed.

A transfer of a person from one status to another can be performed not gradually ("skipping" unnecessary status) i.e.:

- Pre-candidate or candidate can be transferred straight to Employed on probation or Employed

A transfer of several people project statuses is available.

You can schedule the same event to several people and attach one document to several persons' cards.

It is possible to assign and enter the results of one event to several people at once, send one emails / SMS to a group of candidates and attaching one document to the cards of several people at once.

[2] see **"Extra services"**.

EXTERNAL AND INTERNAL RECRUITMENT

Function of mass sending of letters in "Typical recruitment" is actually a service of sending mass emails. Use it wisely without exceeding the limits set by your email provider. Consult with your manager about these limits for your company. Daily limit exceeding of e-mail sending could lead to blocking of your mail server by your provider.

To start an active work with project candidates it is required to accept the project to work. After that a command **"SearchWorkSheet"** becomes available. Open **the project card**, click the button **"Project"**, in the drop-down menu select the command **"Change the project status"**. Selected status **"In progress"** will be displayed in the **project card**.

Current project statuses:

- **Request** – this status is for projects on approval.
- **In progress** – this status is for projects in process.
- **Frozen** – this status is for temporary stopped projects.
- **Partially completed** – this status is for projects with the number of positions more than one and minimum one of them is closed.
- **Completed** – this status is for finished projects.
- **Cancelled** – this status is for cancelled projects.

To add a co-executor to the project:

in the project card click the button **"Person"** and in the drop-down menu select a command **"Add a co-executor to the project participants"**. In the opened window select the name of the necessary employee (Fig. 5).

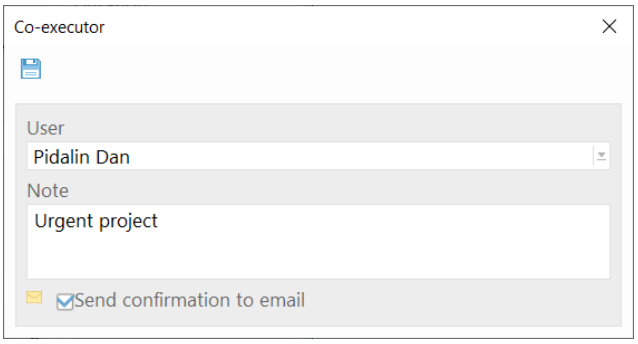


Fig. 5. Add co-executor to the project

If you would like to delete a co-executor from the project participants:

in the project card click the button **"Person"** and in the drop-down menu select a command **"Remove co-executor"**. Highlight the name of the co-executor and click **"OK"**.

For addition/ removing of recruitment agency from project participants:

click on the button **"Work on project"** in **"Project's card"** to open the menu and choose **"Add recruitment agency to project/ remove recruitment agency from project"**(Fig. 6).

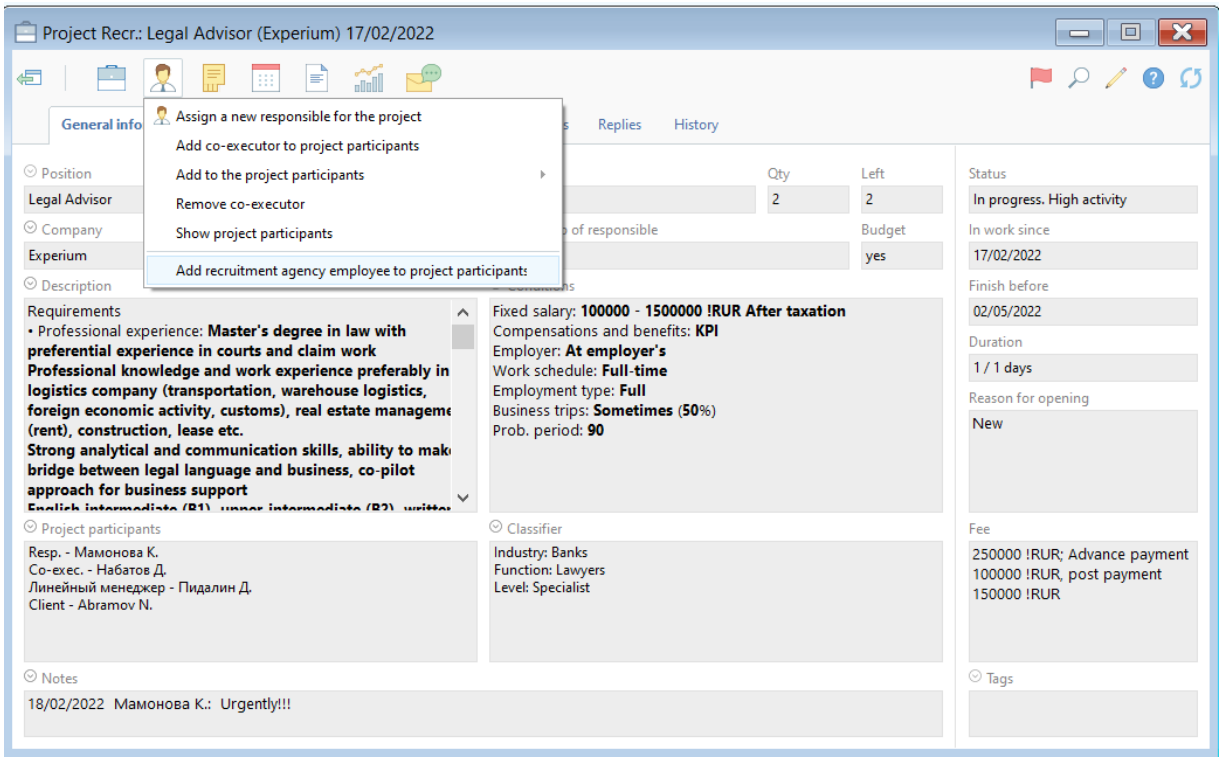


Fig. 6. Add recruitment agency employee to project participants

If you want to remove recruitment agency employee from the project:

click on the button **"Person"** in the control panel of **"Project card"** to open the menu and choose **"Remove recruitment agency employee from the project"**.

SearchWorkSheet

For opening project SearchWorkSheet (Fig. 7):

Click on the button **"Project"** in the control panel of the project card. Select **"SearchWorkSheet"** in the drop-down menu.

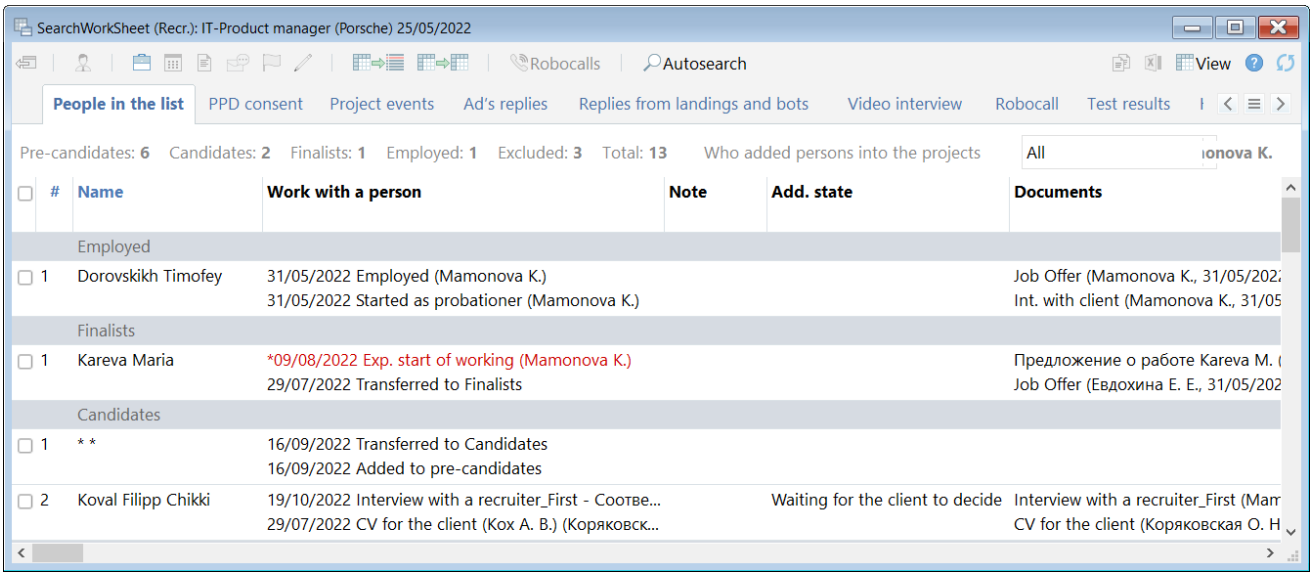


Fig. 7. SearchWorkSheet

EXTERNAL AND INTERNAL RECRUITMENT

For adding pre-candidates to "SearchWorkSheet":

If you need to add one person, please, open the card of this person and click on the button **"Participation in projects"** in the control panel of the card, then in the dropdown menu select the appropriate command.

If you need to add a group (list) of people to the project you should highlight this list of people and click on the button **"Add person to the SearchWorkSheet"** in the control panel of the list, then in the dropdown menu select the appropriate command.

To transfer pre-candidates to the candidates (as well as to the finalists and to the employed):

In the opened **"SearchWorkSheet"** click the right-mouse button on the name of the person and in the drop-down menu select a command **"Transfer to the candidates/finalists/employed"** (Fig. 8).

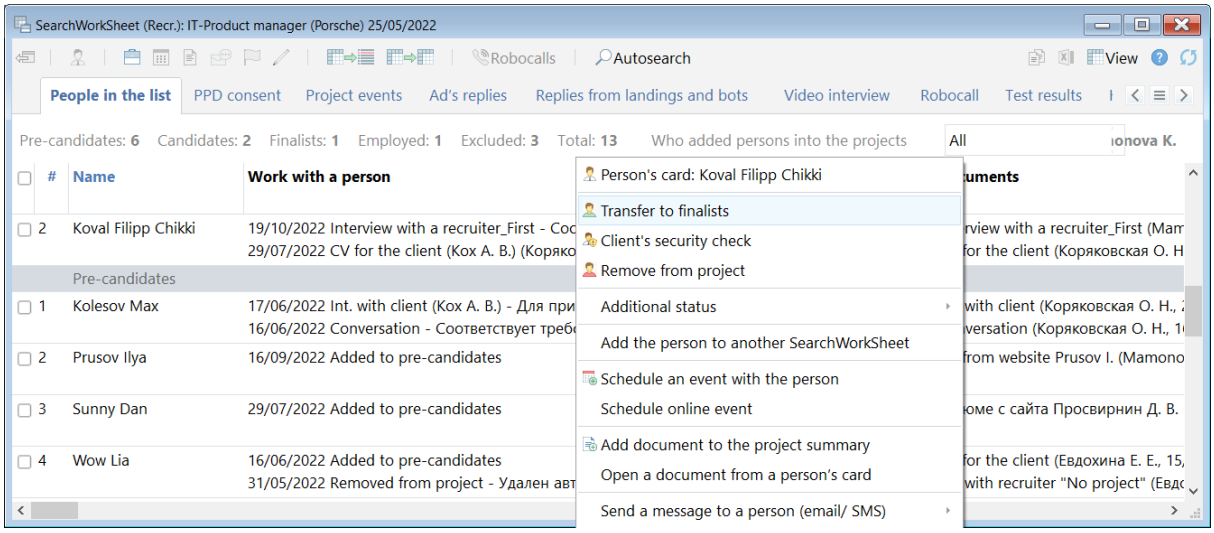


Fig. 8. Transfer to finalist

For scheduling the event (conversation, interview, etc.) with a pre-candidate /candidate/ finalist of the project:

In the opened **"Search Worksheet"** click the right-mouse button on the name of a person and in the drop-down menu select a command **"Schedule an event with the person"** (Fig. 9).

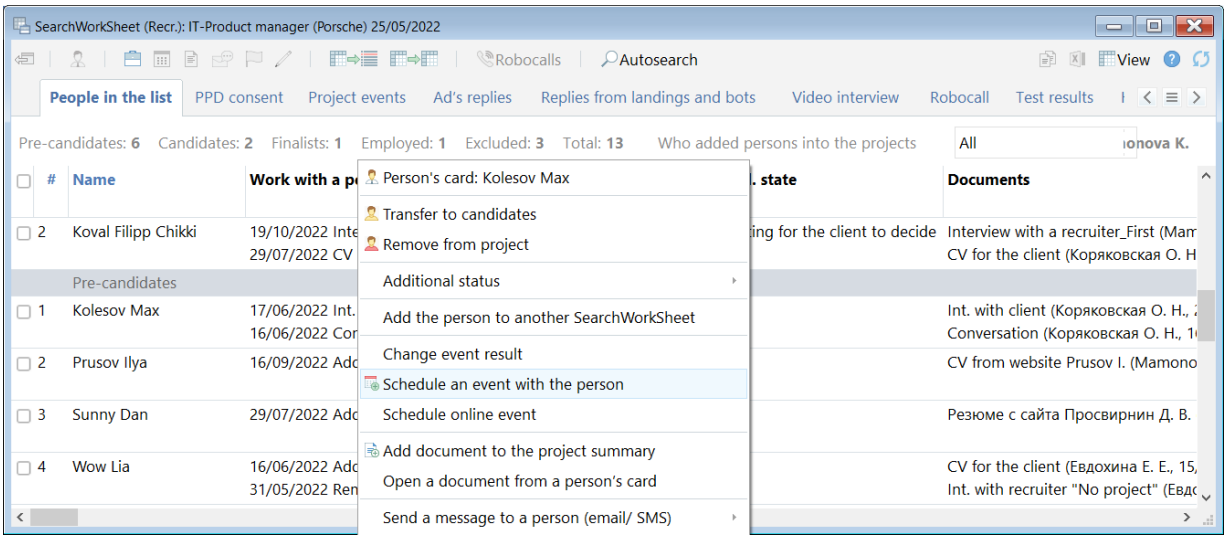


Fig. 9. Schedule an event with the person

EXTERNAL AND INTERNAL RECRUITMENT

For adding a document (CV, conversation, interview, etc.) in the project with a pre-candidate/ candidate/ finalist: In the opened **"SearchWorkSheet"** click the right-mouse button on the full name of a person and in the drop-down menu select a command **"Add document to the Project summary"** (Fig. 10).

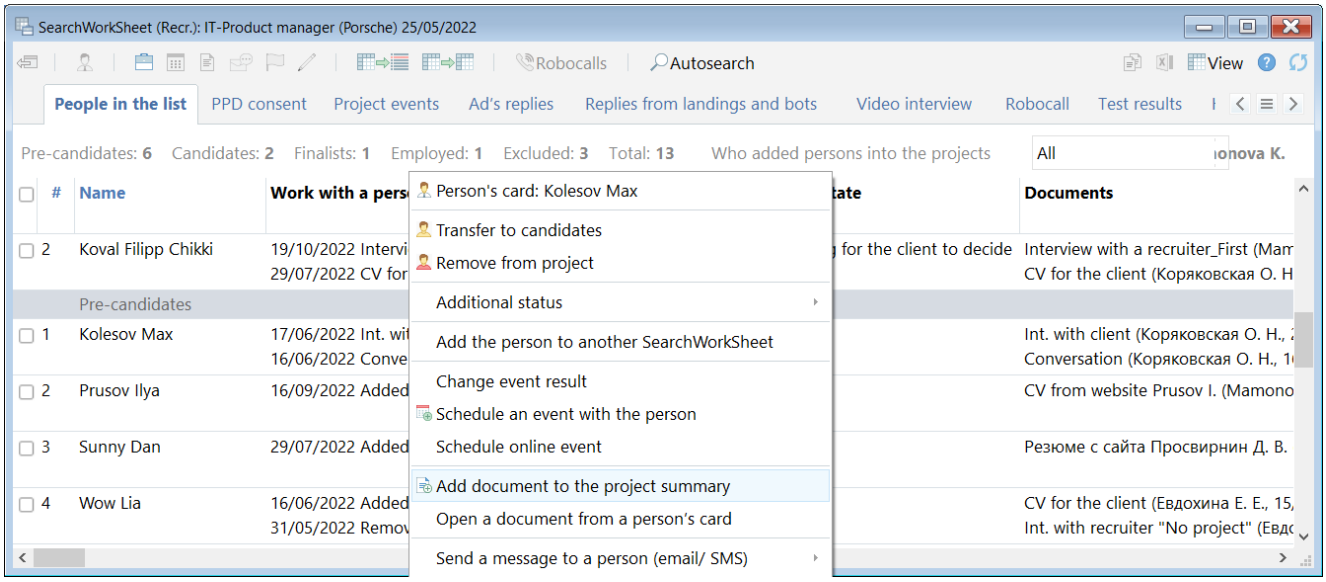


Fig. 10. Add document to the Project summary

For adding additional status for a pre-candidate/ candidate/ finalist:

in the opened **"SearchWorkSheet"** click the right-mouse button on the name of a person, in the drop-down menu select a command **"Additional status"** and then in the drop-down list indicate the appropriate additional status of a person (Fig. 11).

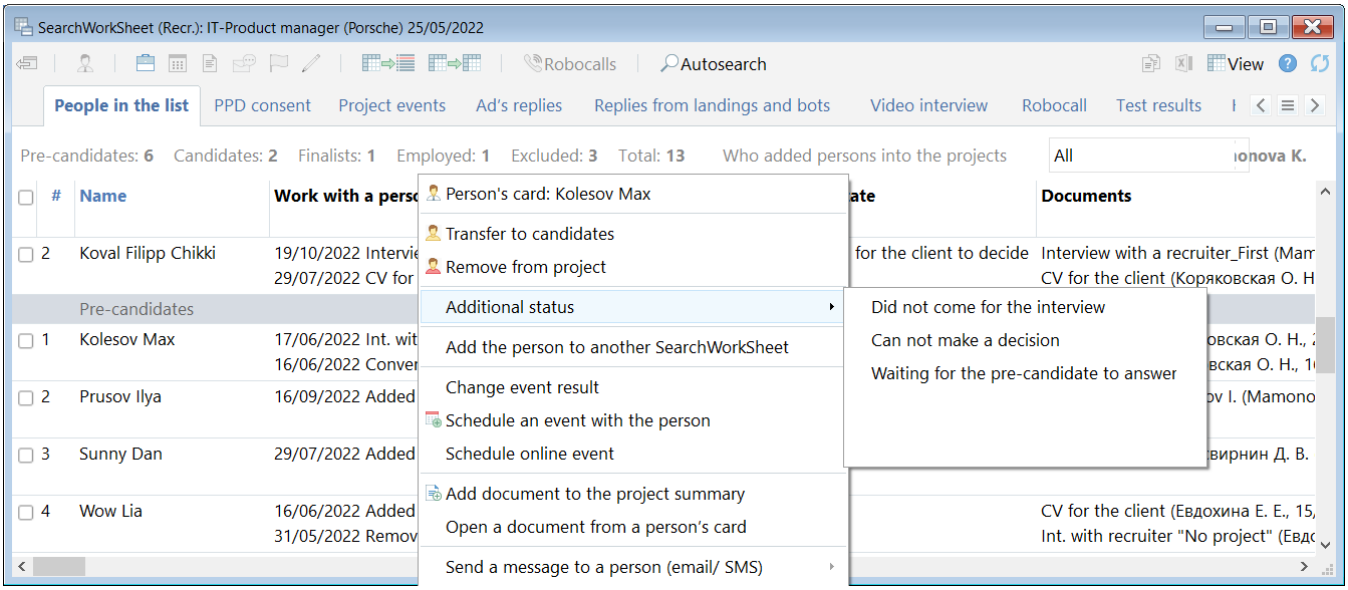


Fig. 11. Add additional status

Additional status is a comment to the general status of a person in the project. While transferring people from one status to another (for example, from pre-candidates to candidates) additional statuses are not saved. You can edit preset additional statuses and create new ones using the Chief Administrator account.

For sending e-mail to a pre-candidate /candidate /finalist:

in the opened **"SearchWorkSheet"** click the right-mouse button on the full name of a person and in the drop-down menu select a command **"Send message to person"** (Fig. 12).

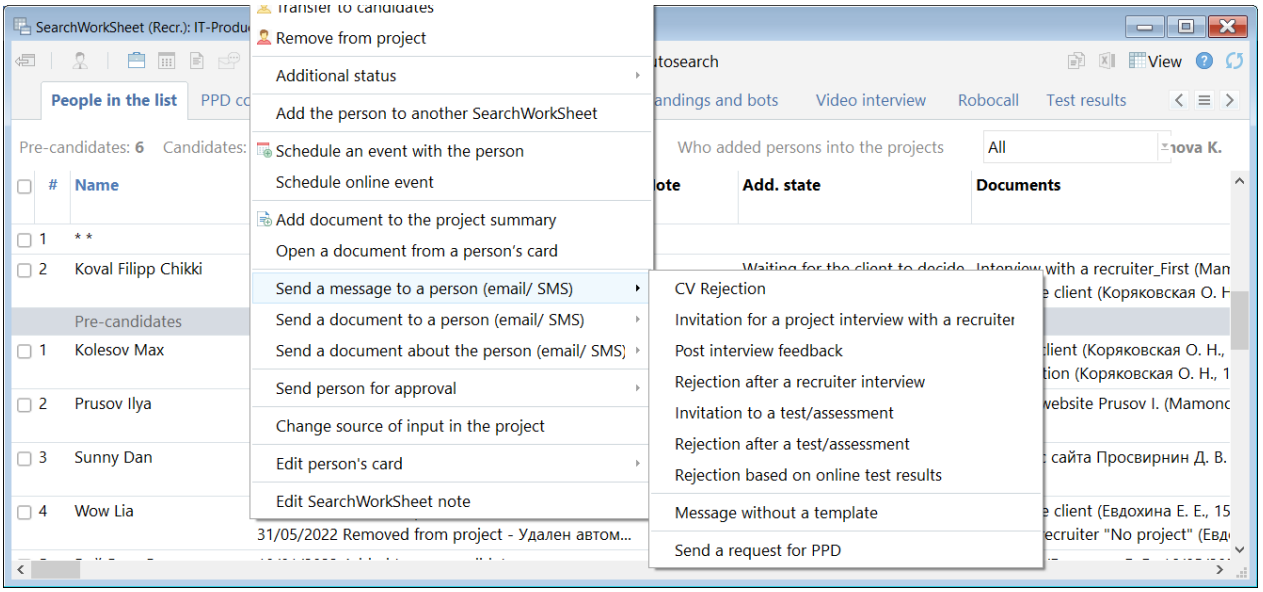


Fig. 12. Send a message to a person (email/SMS)

For sending a job offer to the finalist:

in the opened **"SearchWorkSheet"** click the right-mouse button on the name of a person and in the drop-down menu select a command **"Job offer"** (Fig. 13).

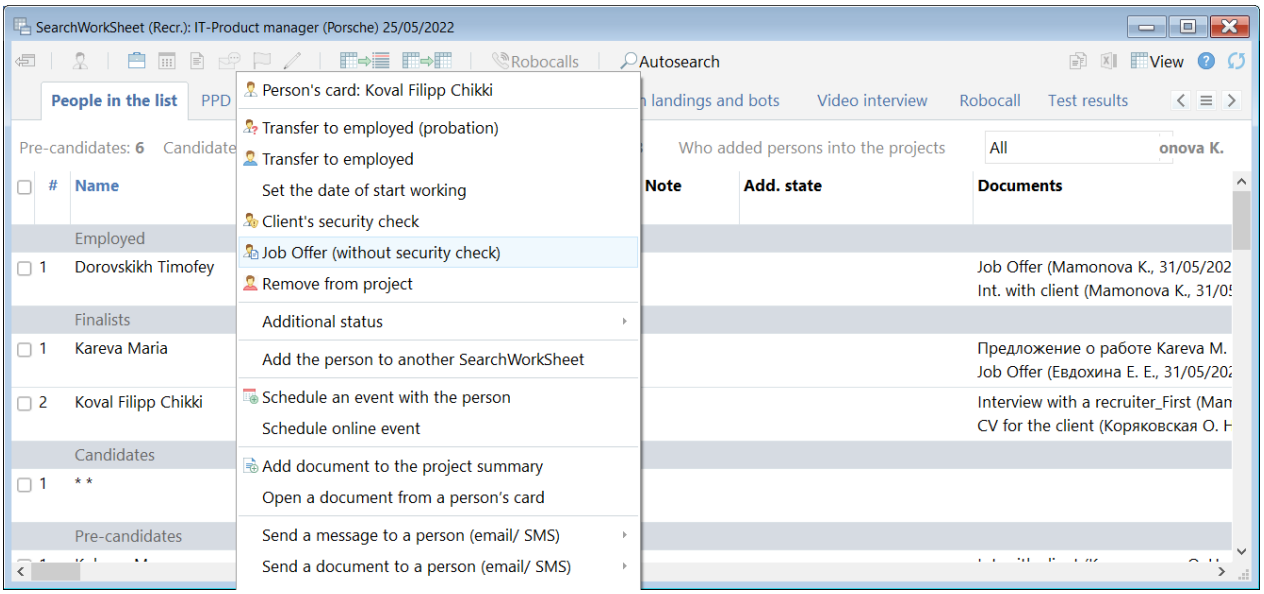


Fig. 13. Job offer

To remove pre-candidate (candidate or finalist) from the project:

in the opened **"SearchWorkSheet"** click the right-mouse button on the name of a person and in the drop-down menu select the command **"Remove from project"** (Fig. 14). Then in the opened window necessarily indicate a reason of a person's removing from the project, if it's required enter a comment on the removing reason.

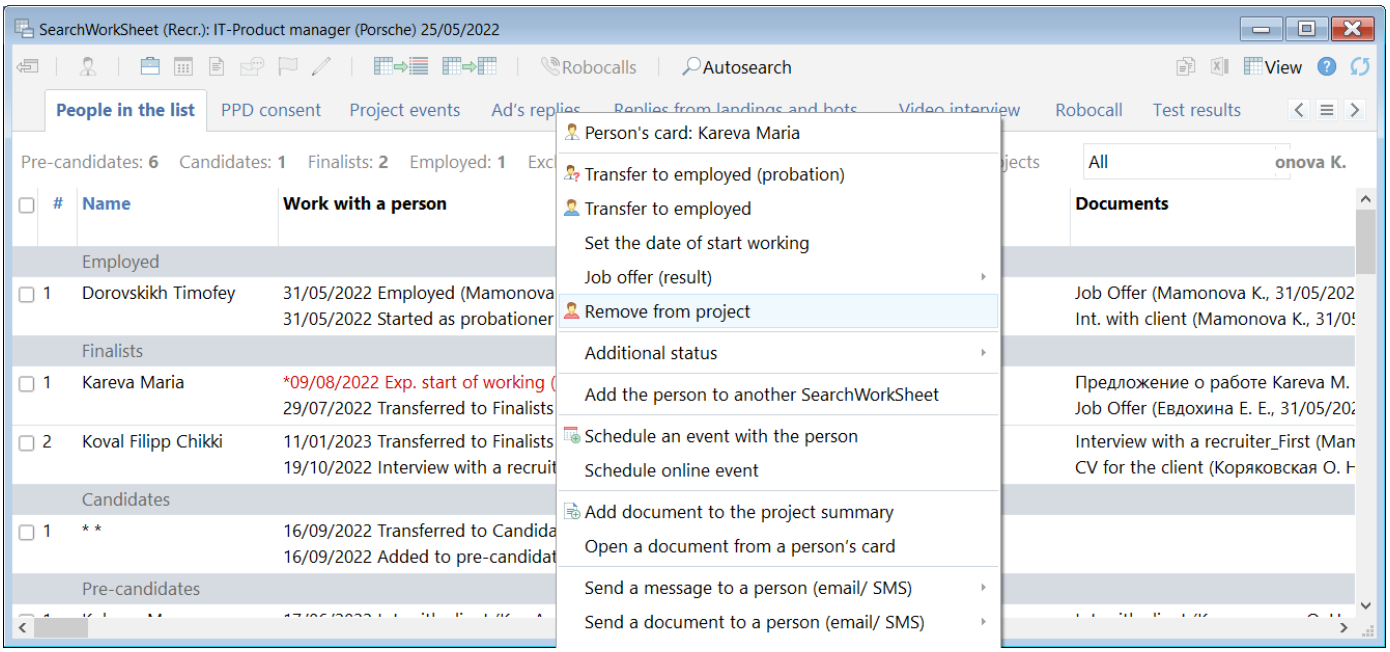


Fig. 14. Remove from project

The Chief Administrator can edit preset reasons of a person's removing from the project as well as create new ones.

RESEARCH

The project is not intended for recruitment for the open position but for forming a list of candidates (by certain criterion) and working with them.

Project's card

Project's card "Research" consists of the following parts (Fig. 15):

- **Control panel** - is located in the upper area of the card;
- **A set of tabs:**
  - General information;
  - Work on project;
  - History.

Project card "Research" is created through the program control panel:

in the program control panel click the button **"Project**" and in the drop-down menu select a command **"New project**". In the opened window select a recruitment type **"Research**" and then click the button **"OK**". The window for creation the project card will open.

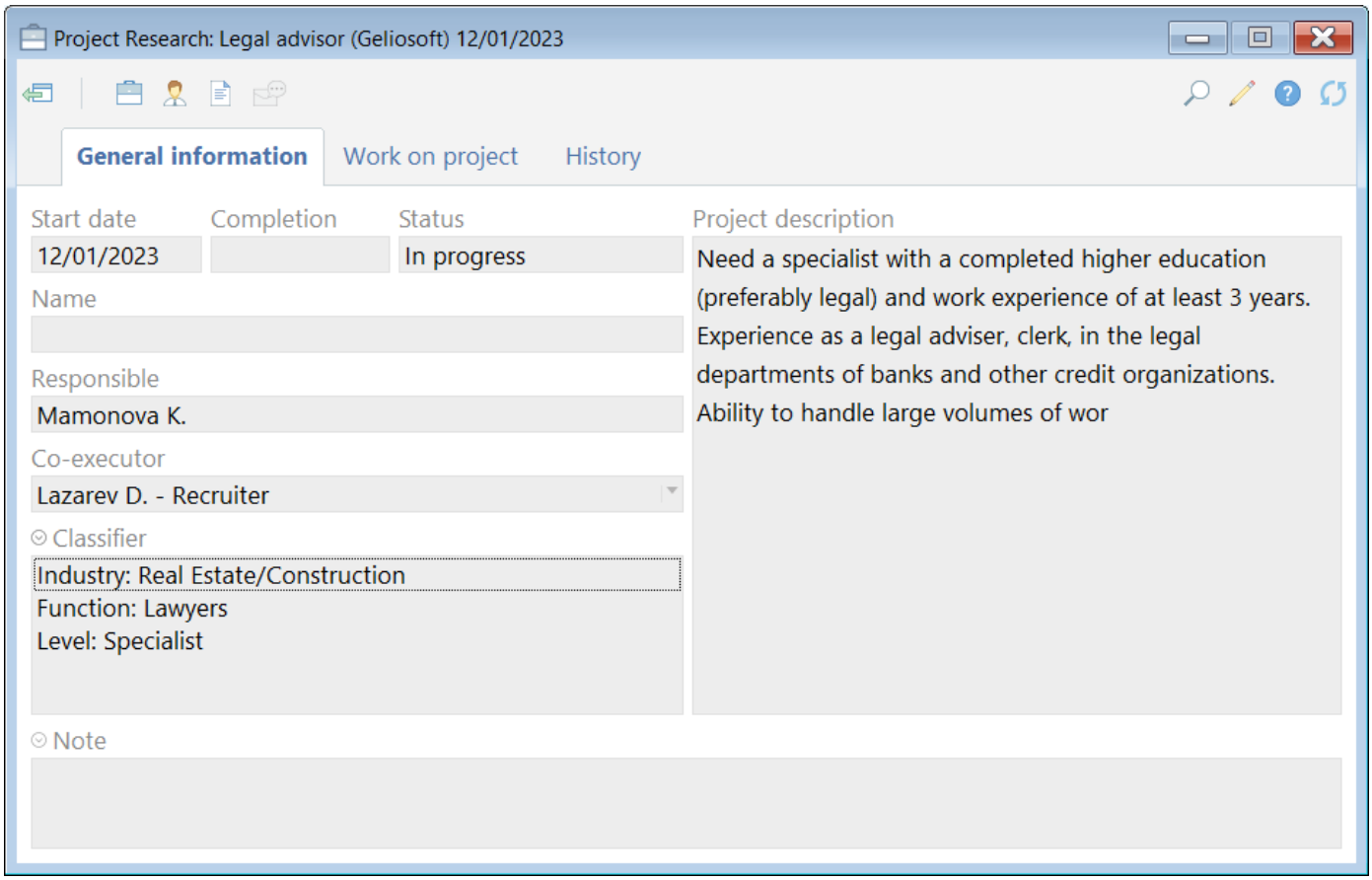


Fig. 15. Project card "Research"

Current project statuses:

- **In progress** – this status is for projects in work.
- **Archive** – this status is for projects which are not in progress.

For adding a co-executor to the project:

in the project card click on the button **"Person"** and in the drop-down menu select a command **"Add co-executor to the project participants"**. In the opened window select the name of a required employee (Fig. 16).

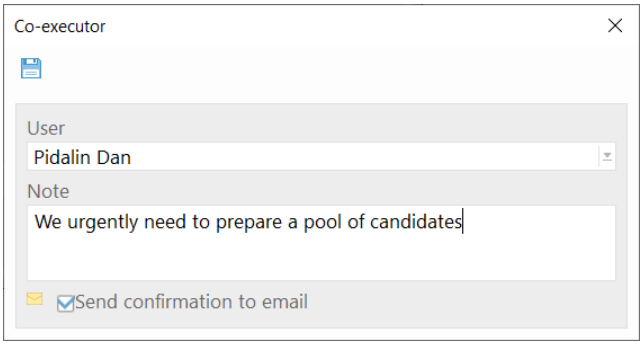


Fig. 16. Add co-executor to the project participants

If you want to remove a co-executer from the project participants:

In **the project card** click the button **"Person"** and in the drop-down menu select a command **"Remove co-executor"**. Highlight the name of a co-executor and click on the button **"Remove"**

SearchWorkSheet

For opening the current SearchWorkSheet (Fig. 17):

Click on the button **"Project"** in control panel of **the project card**. In the drop-down menu select a command **"SearchWorkSheet"**.

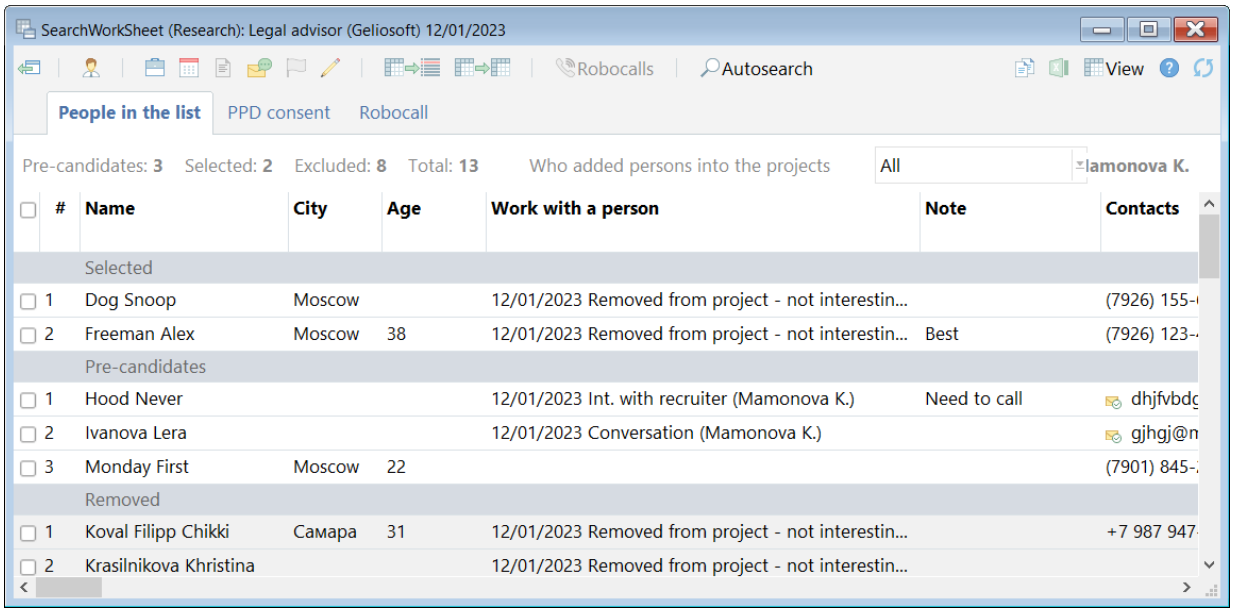


Fig. 17. SearchWorkSheet (Research)

Adding pre-candidates to the "SearchWorkSheet":

If you need to add one person to the project, open this person's card and click on the button **"Participation in projects"** in the control panel of the card, then in the drop-down menu select an appropriate command.

If you need to add a group (list) of people to the project, highlight this list of people and click on the button **"Project" (Add person to SearchWorkSheet)** in the control panel of the list, then in the drop-down list select an appropriate command.

For transferring Pre-candidates to Selected:

Click the right-mouse button on the name of a person and in the drop-down menu select a command **"Add to final list"** (Fig. 18).

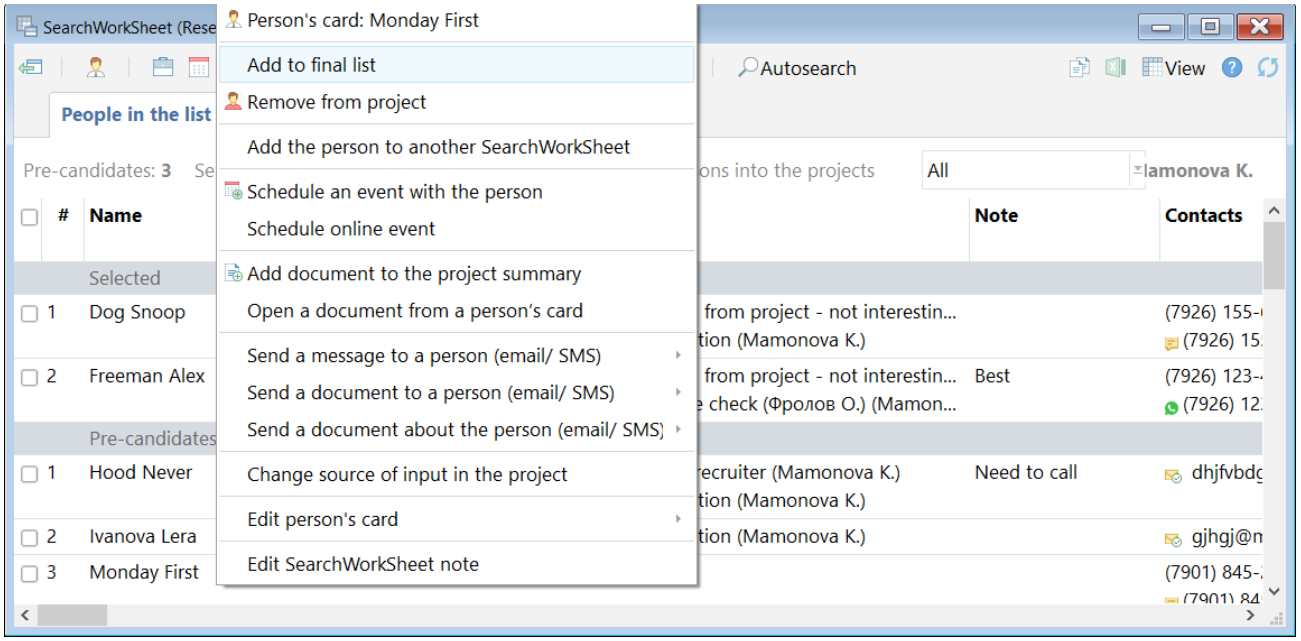


Fig. 18. Add to final list

For scheduling an event (conversation, interview, etc.) with pre-candidates/selected people in the project:

in the opened **"SearchWorkSheet"** click the right-mouse button on the name of a person and in the drop-down menu select a command **"Schedule an event with a person"** (Fig. 19).

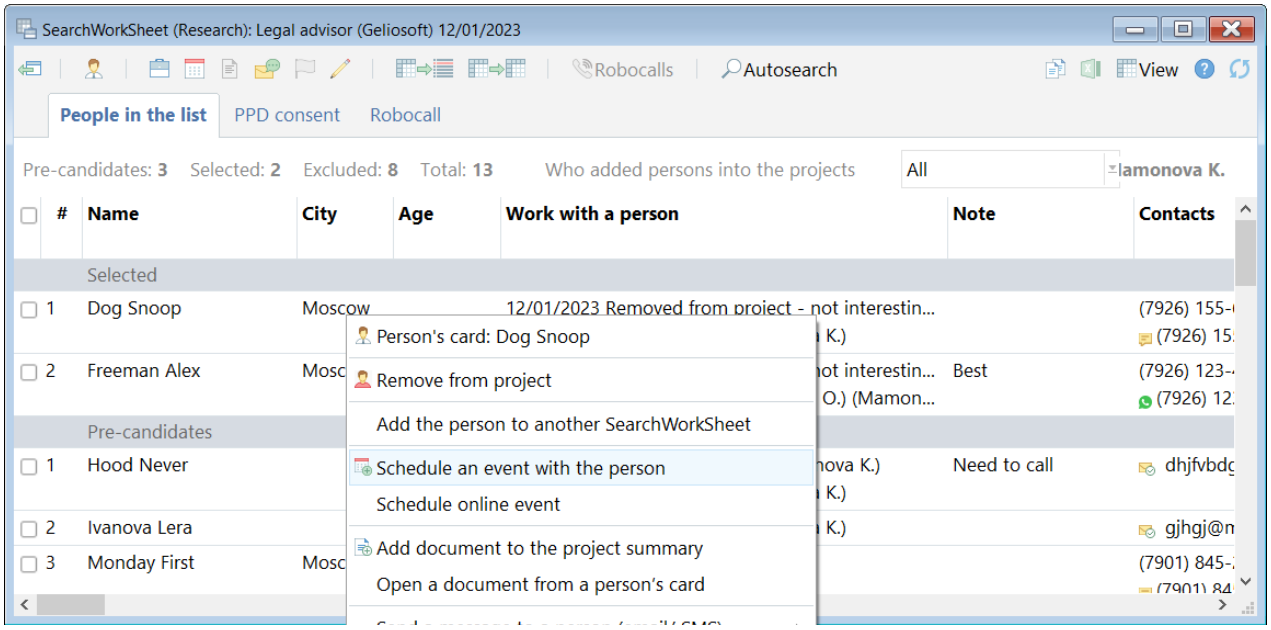


Fig. 19. Schedule an event with a person

For adding a document (CV, conversation, interview, etc.) on the project with a pre-candidate/selected person:

in the opened **"SearchWorkSheet"** click with the right-mouse button on the name of a person and in the drop-down menu select a command **"Add document to the project summary"** (Fig. 20).

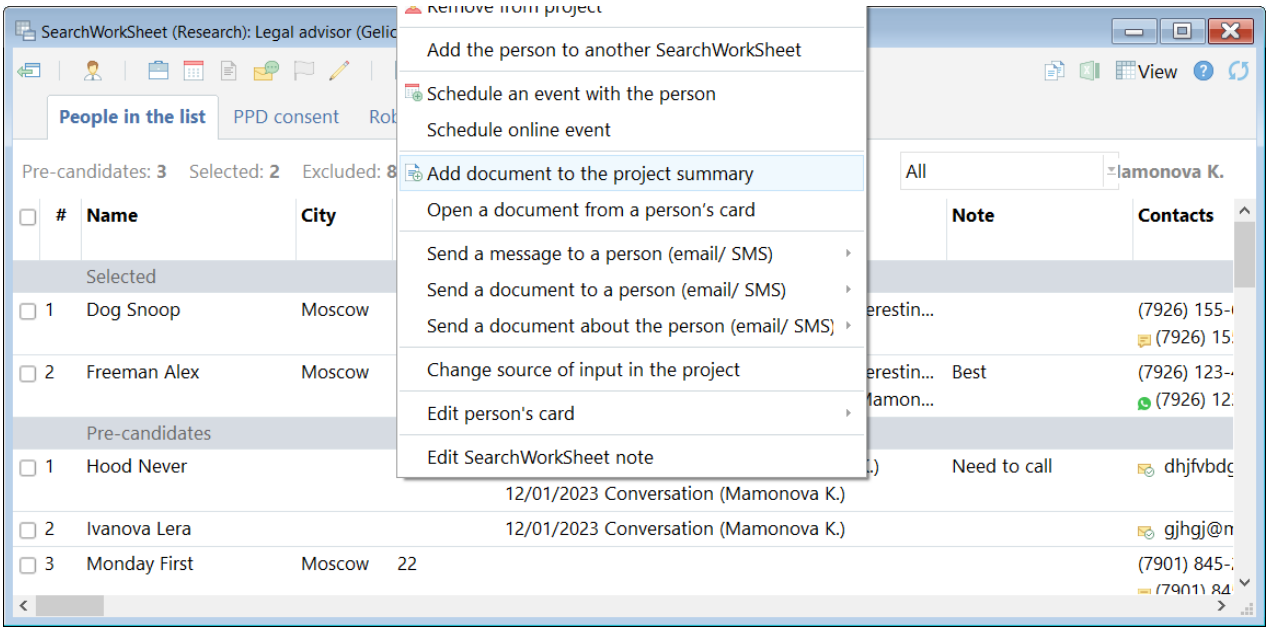


Fig. 20. Add document to the project summary

For sending an e-mail to the pre-candidate/selected person:

In the opened **"SearchWorkSheet"** click with the right-mouse button on the name of a person and select a command **"Send message to person (email/SMS)"** (Fig. 21).

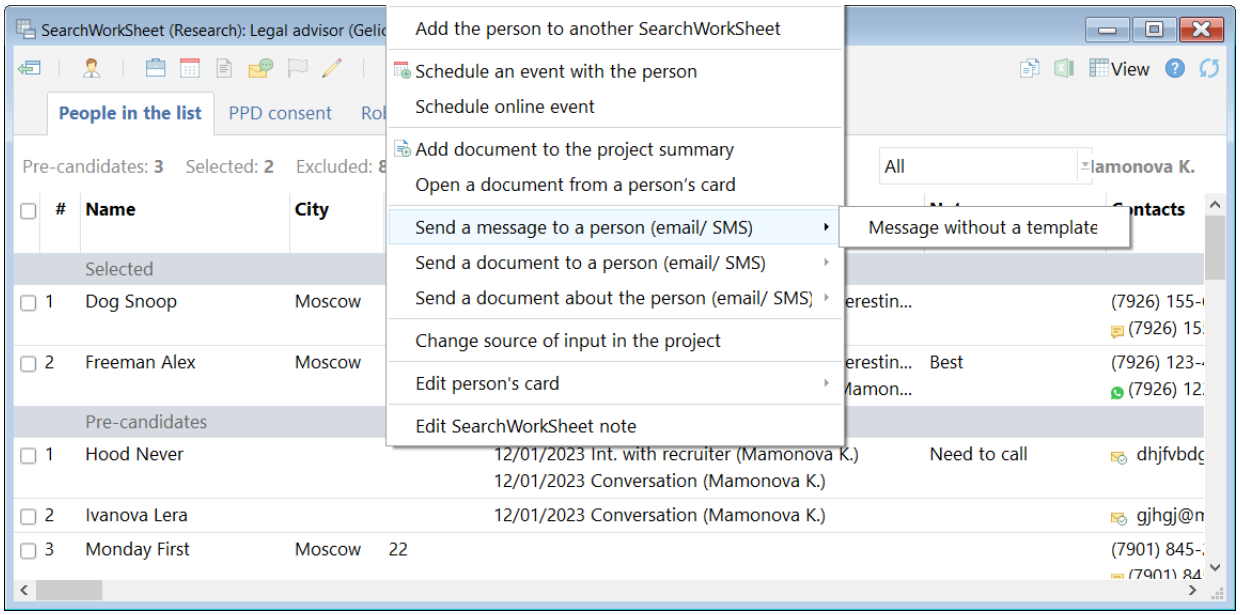


Fig. 21. Send message to person (email/SMS)

For removing a pre-candidate/selected person from the project:

Click the right-mouse button on the name of a person and in the drop-down menu select a command **"Remove from project"**. Then in the opened window necessarily indicate a reason of the person's removing from the project.

PROJECT "BLIND CV"

The project is intended for attracting potential clients by sending them **"Blind CVs"** of candidates that are ideally-suited for the opened vacancies in companies. Several potential clients can be added to this project at the same time.

Project's card

Project's card **"Blind CV"** consists of the following parts (Fig. 22):

- **Control panel** is situated in the upper part of the card;
- **Set of tabs:**
  - General information;
  - Documents;
  - History.

Projects card "Blind CV" is created through the program control panel:

in the program control panel click on the button **"Project"** and in the drop-down menu select a command **"Create new project"**. In the opened window indicate a project type **"Blind CV"** and then click on the button **"OK"**. The window for creation of the project card will be opened.

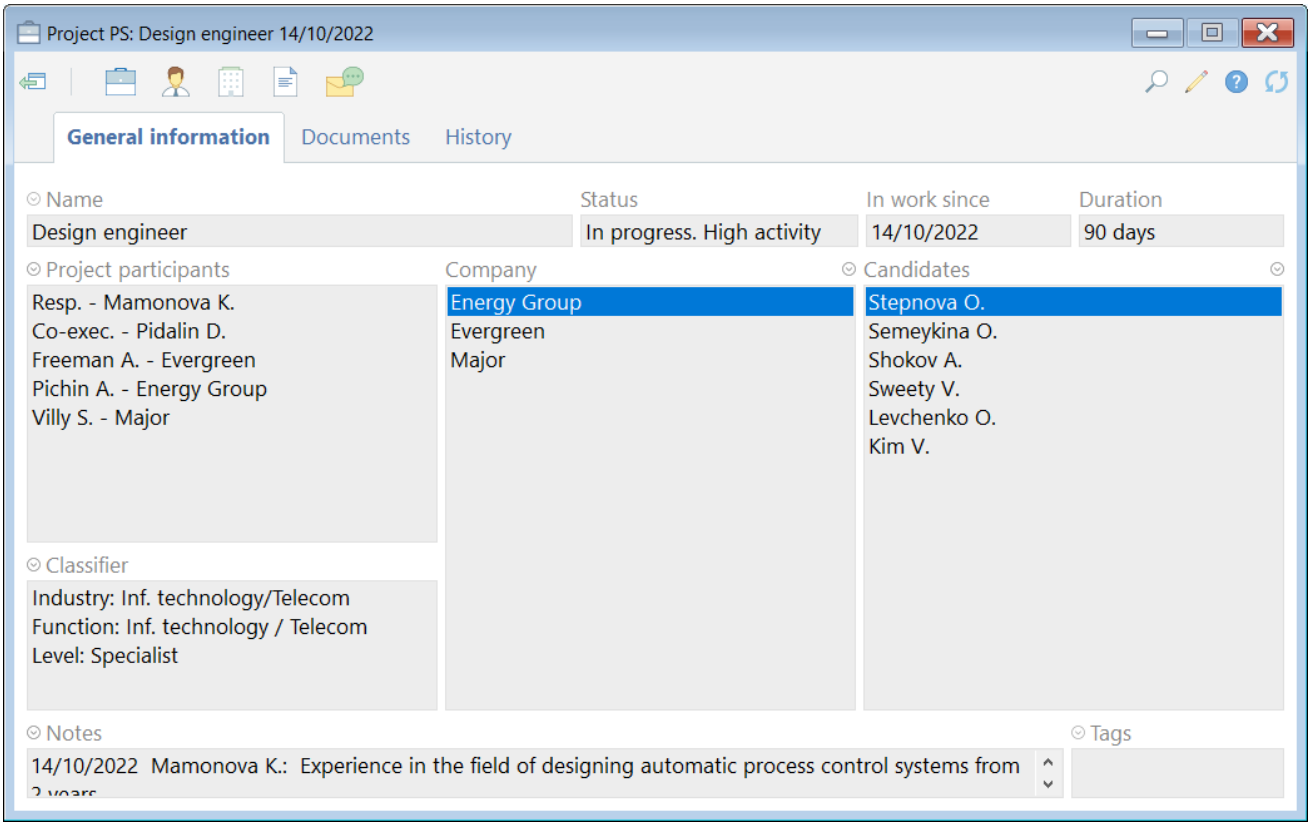


Fig. 22. Projects card "Blind CV"

PROJECT "BLIND CV"

Current project statuses:

- **In progress** – this status is for projects in progress.
- **Completed** – this status is for finished projects.
- **Cancelled** – this status is for cancelled projects.

To add a co-executor to the project:

in the project card click the button **"Person"** and in the drop-down menu select the command **"Add co-executor to project participants"**. In the opened window select the name of the necessary employee (Fig. 23).

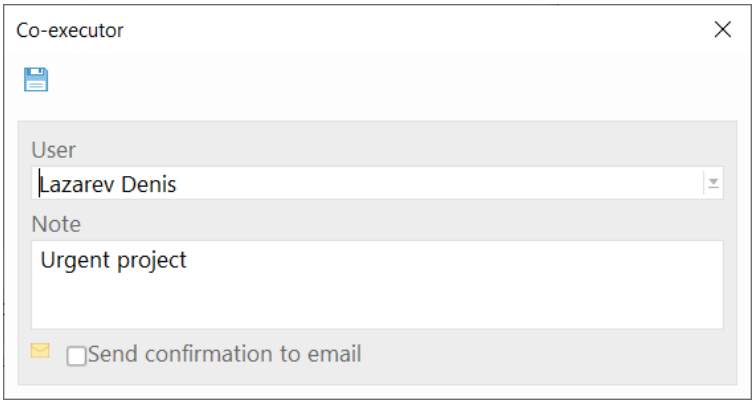


Fig. 23. Add co-executor to project participants

If you would like to delete a co-executor from the project participants:

in the project card click the button **"Person"** and in the drop-down menu select a command **"Remove co-executor"**. Choose the name of the co-executor and click **"OK"**.

For addition/ removing of potential client from the project:

click on the button **"Work with company"** in the **"Project's card"** and in the drop-down menu select a command **"Add a prospect customer to the project/ remove a prospect customer from the project"**.

After adding prospect customer to the project you can **add a prospect client's employees** to the project participants: in the project's card click on the button **"Project participants"** and in the drop-down menu select a command **"Add prospect client employees to the project participants"** (Fig. 24).

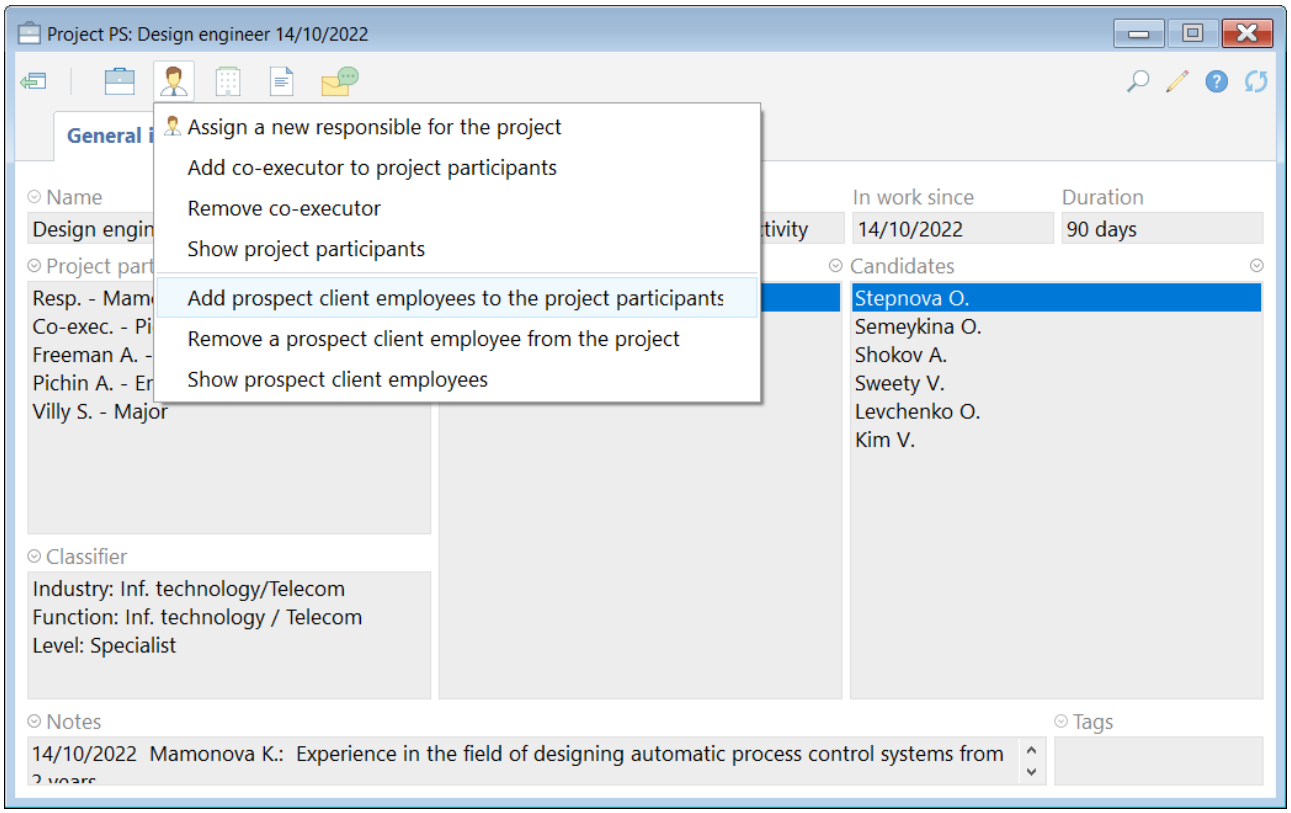


Fig. 24.

If you want to remove a potential client's employee from the project:

in the project's card click on the button **"Project participants"** and in the drop-down menu select a command **"Remove a prospect client employee from the project"**.

SearchWorkSheet

For opening the current project SearchWorkSheet:

Click on the button **"Work on project"** in control panel of the project card. In the drop-down menu select a command **"SearchWorkSheet (PS)"**.

SearchWorkSheet consists of two tabs:

1. Tab **"Companies in the project"** (Fig. 25), where work with companies is displayed;
2. Tab **"People in the list"** (Fig. 26), where work with candidates represented to the companies is displayed.

PROJECT "BLIND CV"

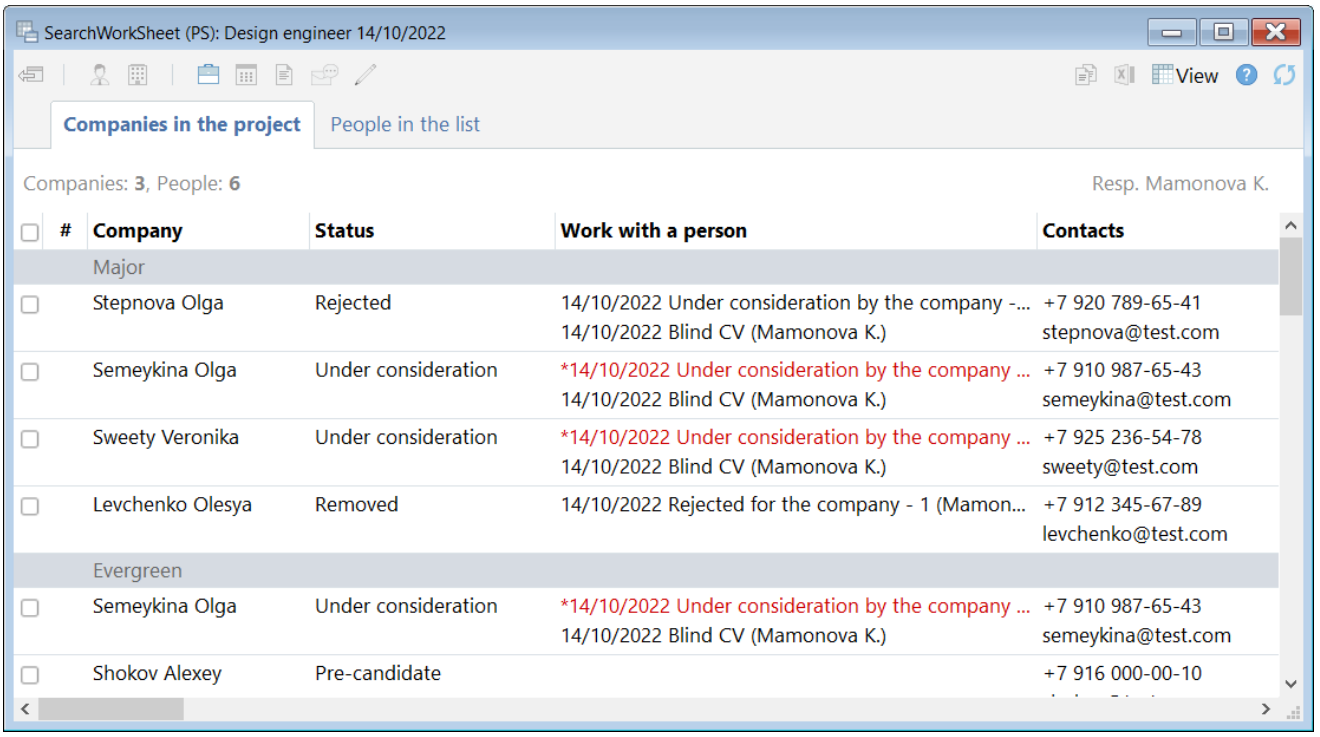


Fig. 25. Tab "Companies in the project"

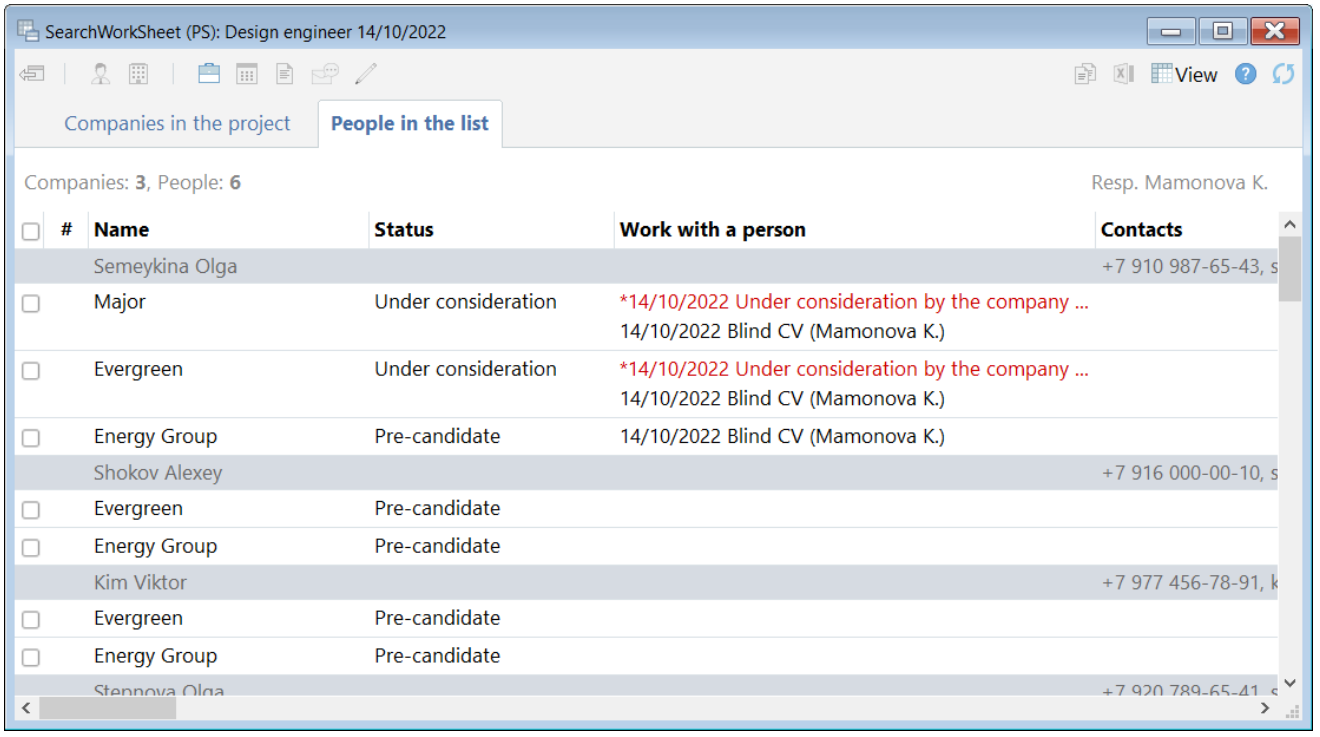


Fig. 26. Tab "People in the list"

PROJECT "BLIND CV"

Adding pre-candidates to the "SearchWorkSheet":

if you need to add one person to the project, open this person's card and click on the button **"Participation in projects"** in the control panel of the card, then in the drop-down menu select an appropriate command.

If you need to add a group (list) of people to the project, mark this list of people and click on the button **"Add person to SearchWorkSheet"** in the control panel of the list, then in the drop-down list select an appropriate command.

A person in the SearchWorkSheet **"Blind CV"** has the following statuses

- Pre-Candidate
- Being considered
- Approved by the client
- Rejected by the client
- Removed from the project

For transferring pre-candidates to the status "Under consideration":

in the opened **"SearchWorkSheet"** in the tab **"Companies in the project"** click with the right-mouse button on the name of a person and in the drop-down menu select a command **"Move to the status "Under consideration"** (Fig. 27).

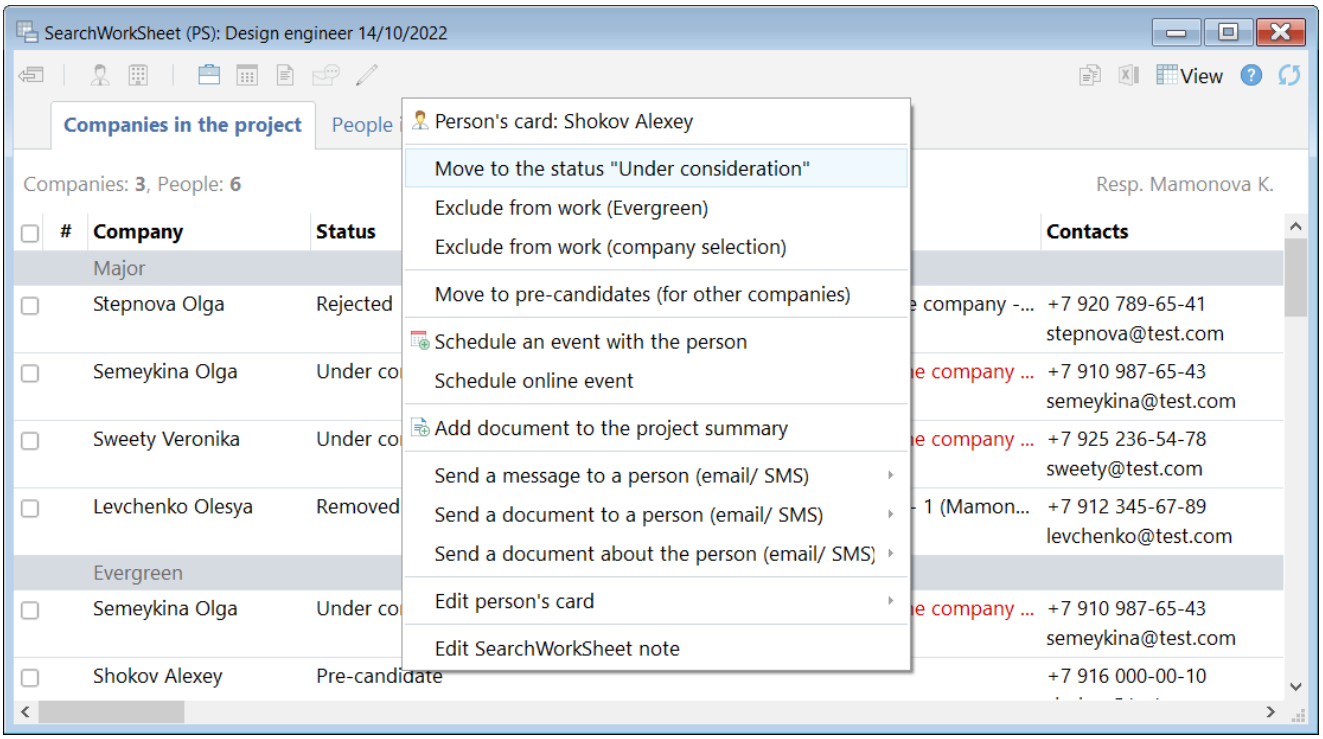


Fig. 27. Move to the status "Under consideration"

PROJECT "BLIND CV"

Status **"Being considered"** requires adding a result – **"Approved"** or **"Rejected"**.

For adding a result in the opened **"SearchWorkSheet"** in the tab **"Companies in the project"** click the right-mouse button on the name of the person and in the drop-down menu select a command **"Under consideration (result)"**.

While transferring a person from the status "Being considered" to the status "Approved" the process of creating the project "Recruitment" is being started in the program. A candidate is automatically added to the project "Recruitment", where all the further work is carried out.

For removing a person from the project:

in the opened **"SearchWorkSheet"** in the tab **"Companies in the project"** click the right-mouse button on the name of the person and in the drop-down menu select a command **"Exclude from work"** (Fig. 28). Then in the opened window necessarily indicate a reason of person's removing from the project.

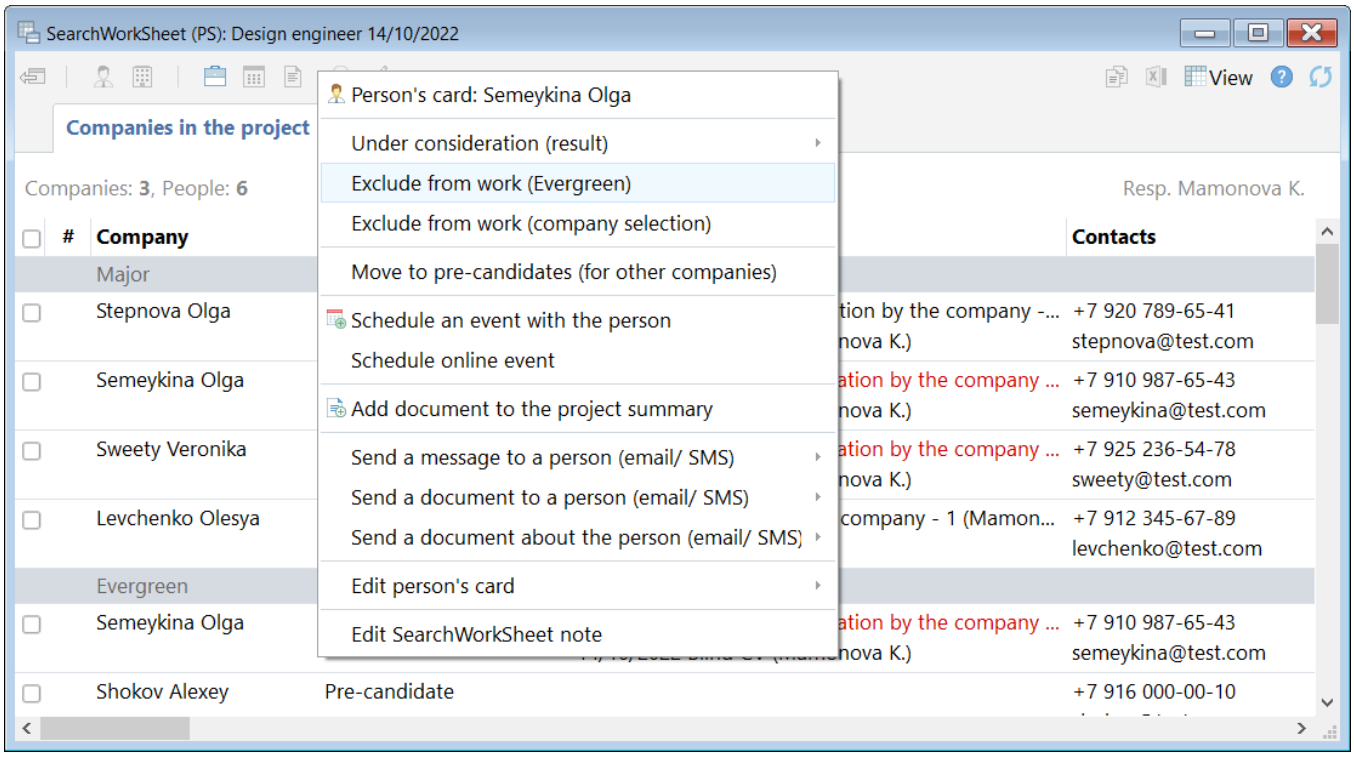


Fig. 28. Removing a person from the project

For scheduling an event (conversation, interview, etc.) with a person from the project:

in the opened **"SearchWorkSheet"** in the tab **"Companies in the project"** click the right-mouse button on the name of a person and in the drop-down menu select a command **"Schedule an event with the person"** (Fig. 29).

PROJECT "BLIND CV"

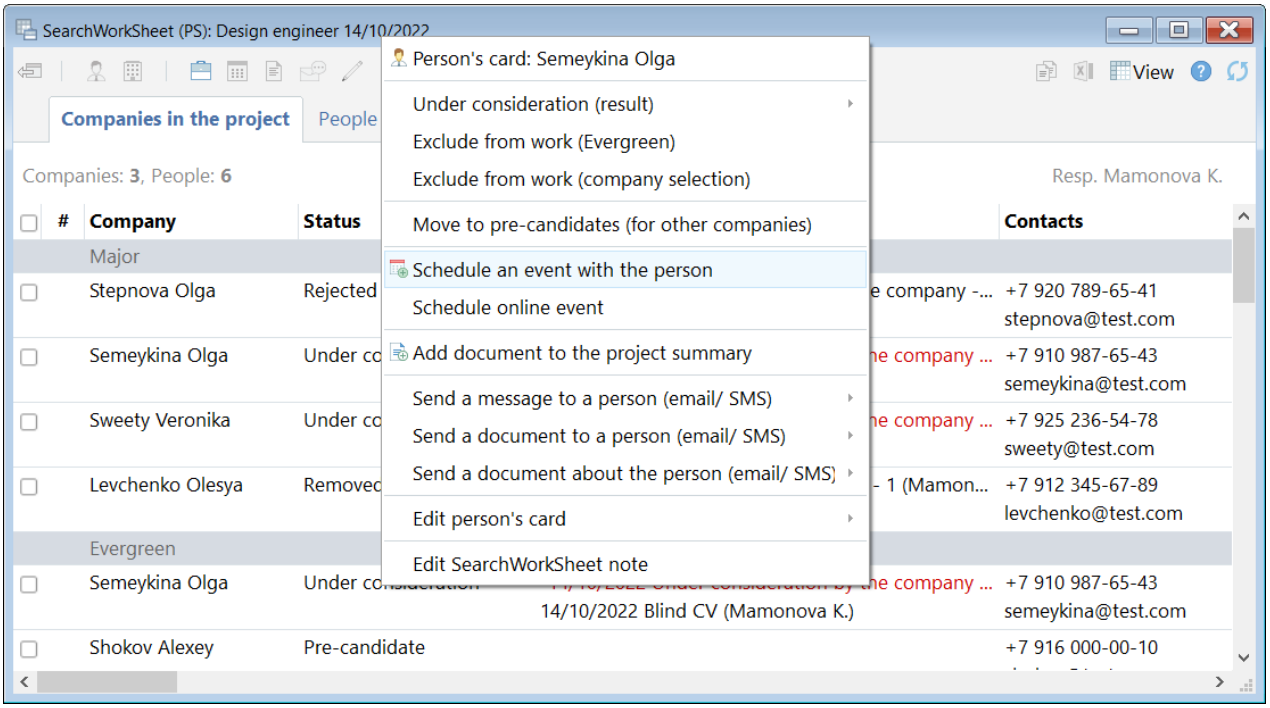


Fig. 29. Schedule an event with the person

For sending an e-mail to the person:

in the opened **"SearchWorkSheet"** in the tab **"Companies in the project"** click with a right-mouse button on the name of a person and in the drop-down menu select a command **"Send a message to a person (email/SMS)"** (Fig. 30).

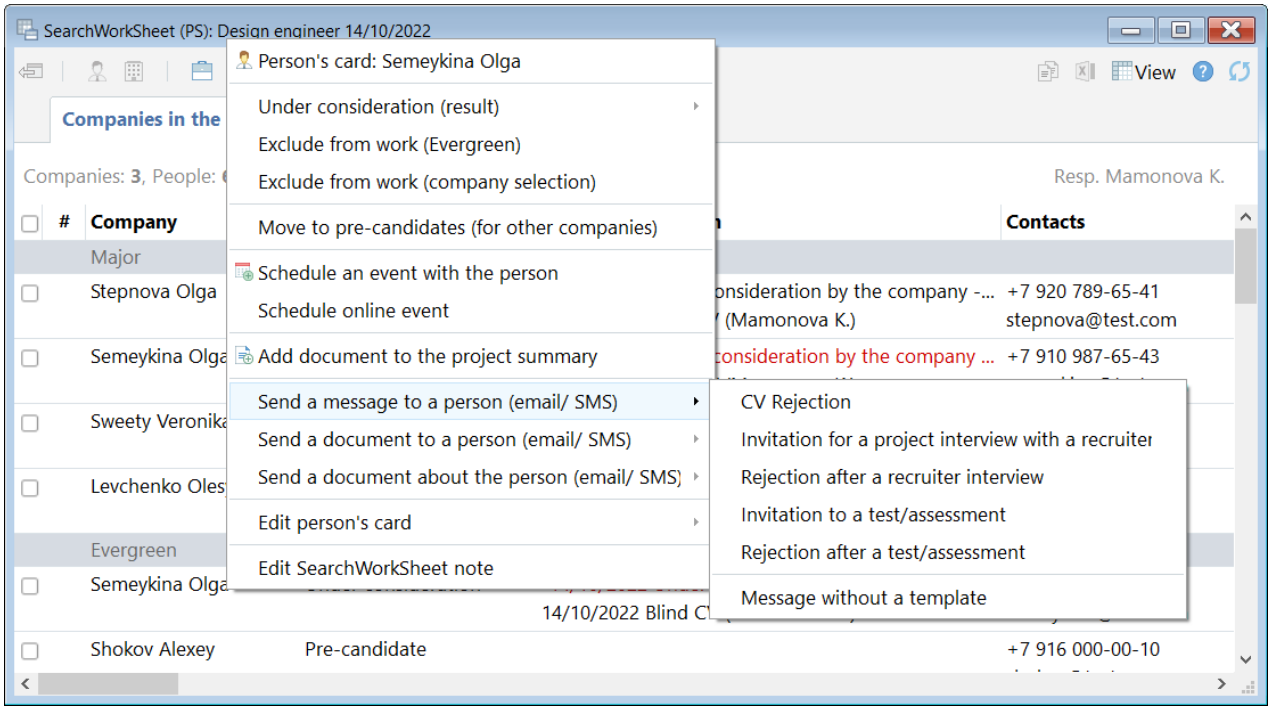


Fig. 30. Send a message to a person (email/SMS)

PROJECT "BLIND CV"

You can send an e-mail to the company (potential client) by several ways:

1. **From the SearchWorkSheet - > tab " Companies in the project "**

Click with the right-mouse button on the full name of the person and in the drop-down menu select a command **"Send a document on a person (email/SMS)";**

2. **From the SearchWorkSheet -> tab "People in the list"**

Click with a right-mouse button on the name of the company and in the drop-down menu select a command **"Send a message to the company"** or **"Send a document to the company"**;

3. **From the Project's card**

Click on the button **"Communicator"** in the project's card and in the drop-down menu select a command **"Send message"** or **"Send project document"**.

PROJECTS AND PEOPLE APPROVAL IN THE RECRUITMENT

Projects approval

For sending the project for an approval:

in the project card click on the button **"Approval"** and in the drop-down menu select a command with the type of approval. Then in the opened window select one or several approvers (Fig. 31).

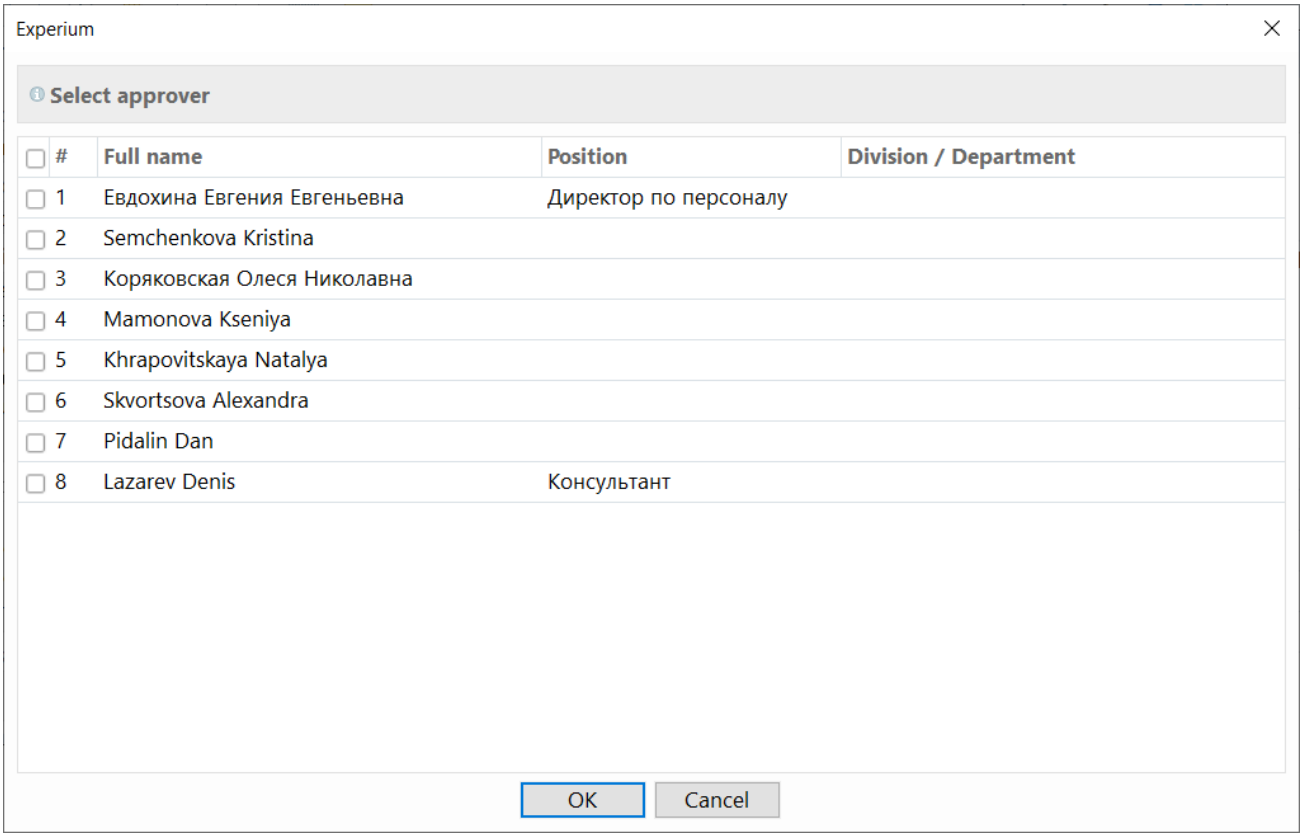


Fig. 31. Sending the project for an approval

For the project approval:

on the program control panel click on the **"Persons and projects approval"** and in the drop-down menu select a command **"Projects approval list"**. Then in the opened window select a tab **"Received"**, highlight the project and click on the button **"Approve"** or **"Reject"** (Fig. 32).

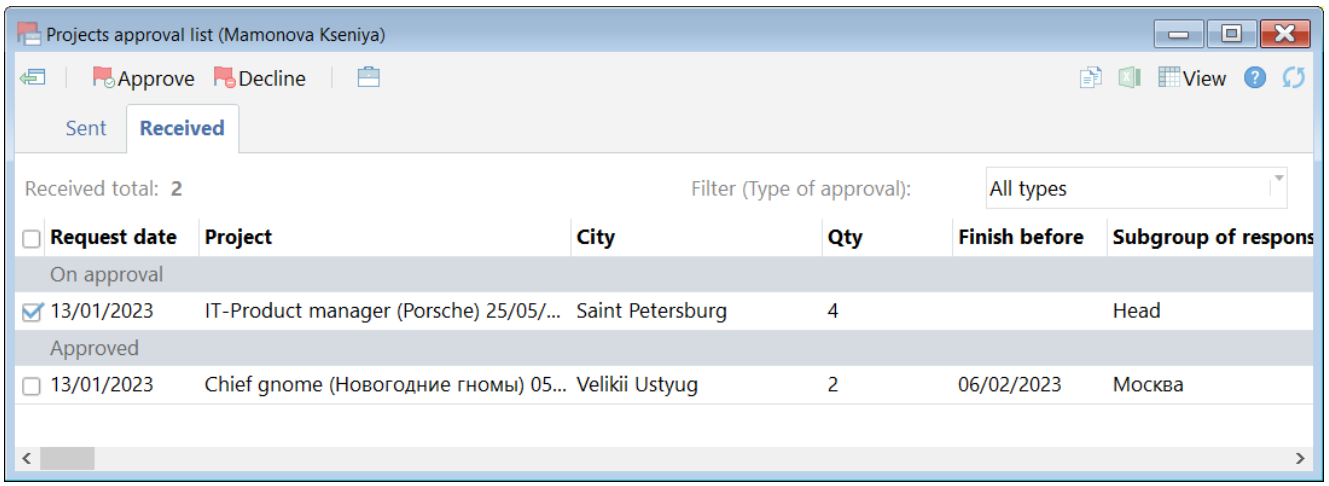


Fig. 32. Projects approval list

People approval

For sending a person for approval (without a project):

in the person's card click on the button **"Approval"** and in the drop-down menu select a command with the necessary type of approval. In the opened window select one or several approvers (Fig. 33).

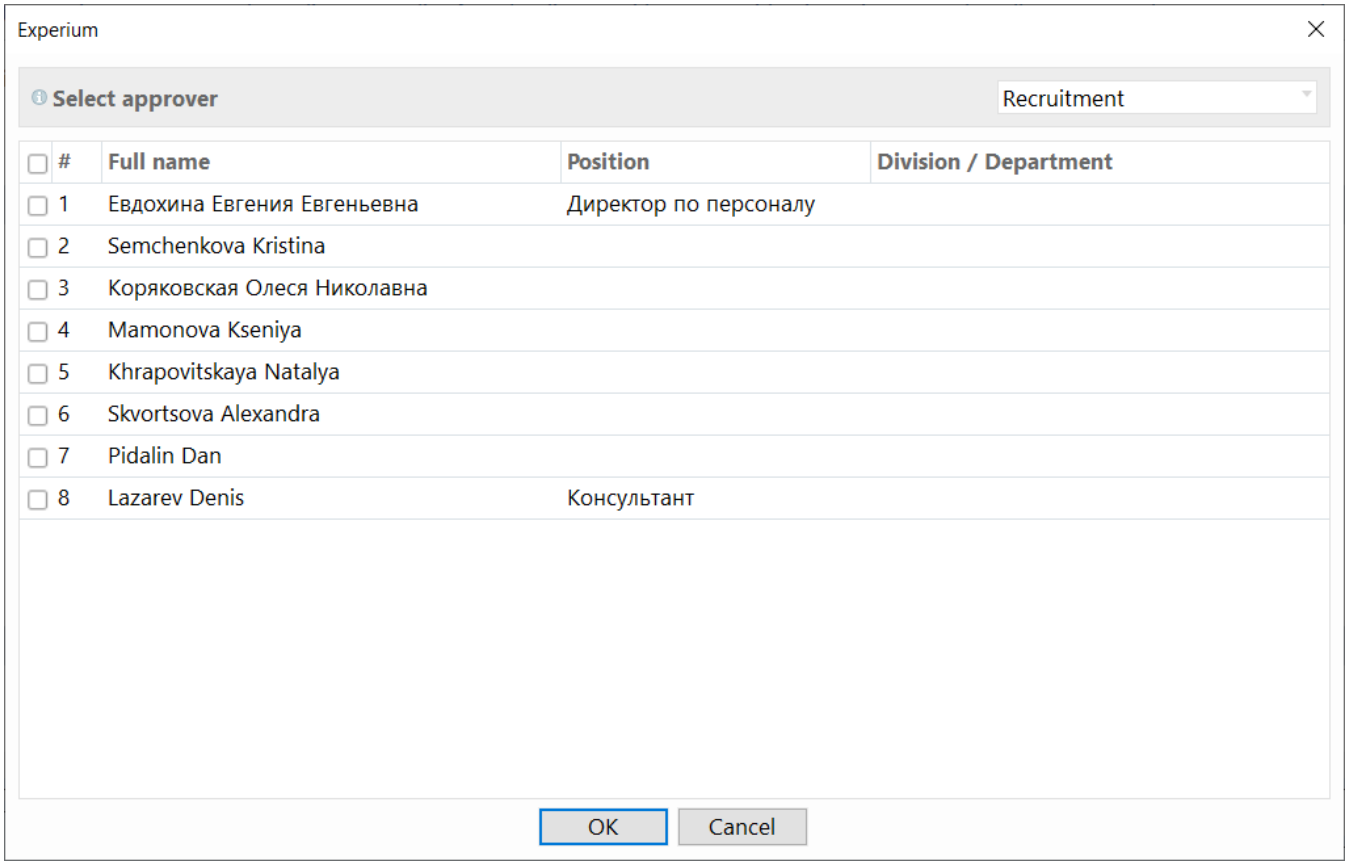


Fig. 33. Sending a person for approval (without a project)

PROJECTS AND PEOPLE APPROVAL IN THE RECRUITMENT

For sending a person for approval (on the project):

in the opened **"SearchWorkSheet"** click with a right-mouse button on the name of a person and in the drop-down menu select a command **"Send person for approval"** (Fig. 34)

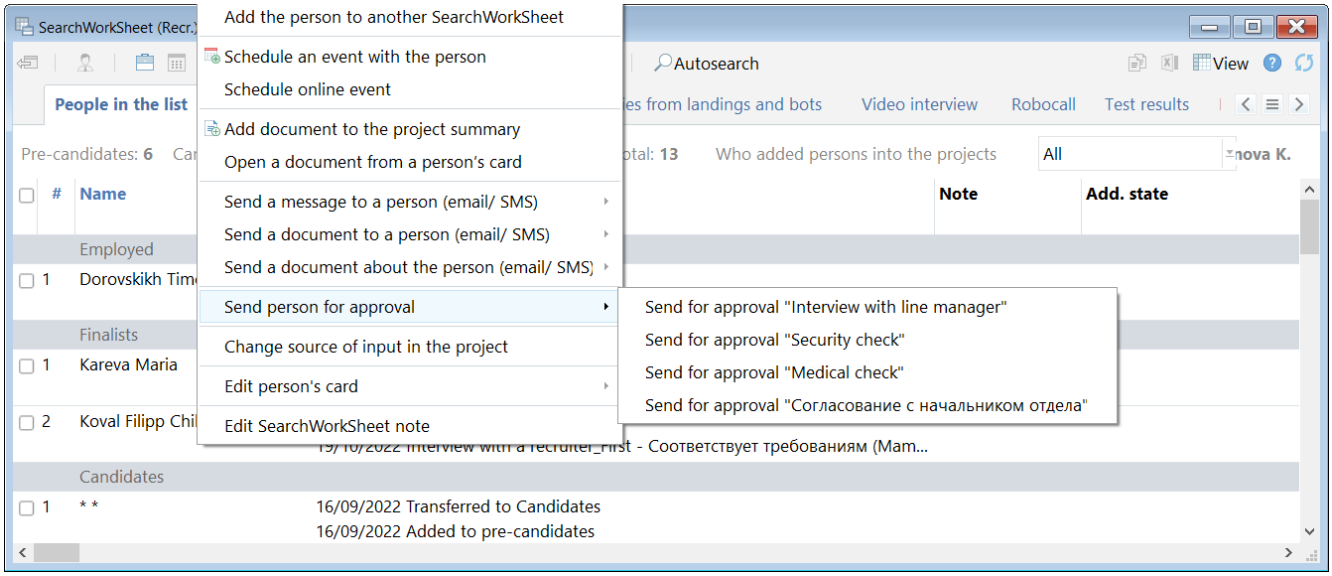


Fig. 34. Sending a person for approval (on the project)

For a person approval:

on the program control panel click on the button **"Persons and projects approval"** and in the drop-down menu select a command **"List of approving people"**. Then in the opened window select a tab **"Received"**, mark a person and click on the button **"Approve"** or **"Decline"** (Fig. 35)

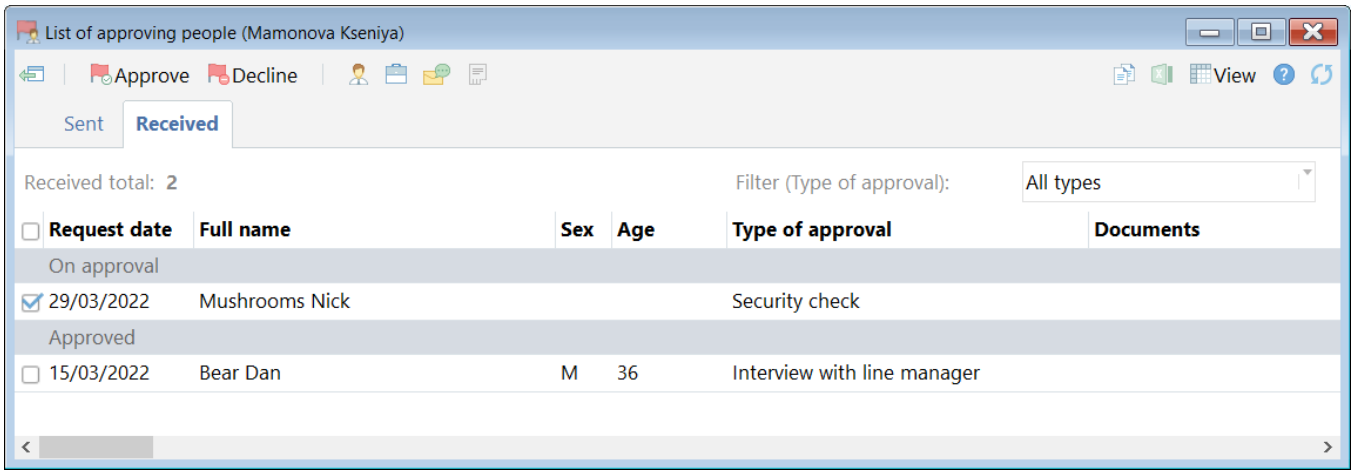


Fig. 35. List of approving people

For scheduling an event without a project (marketing contact, marketing negotiations, etc.) with the customer company:

in the company's card click on the button **"Company events"** and in the drop-down menu select a command **"Schedule marketing contact"**. In the opened window indicate a type of event, date and contact person (Fig. 36).

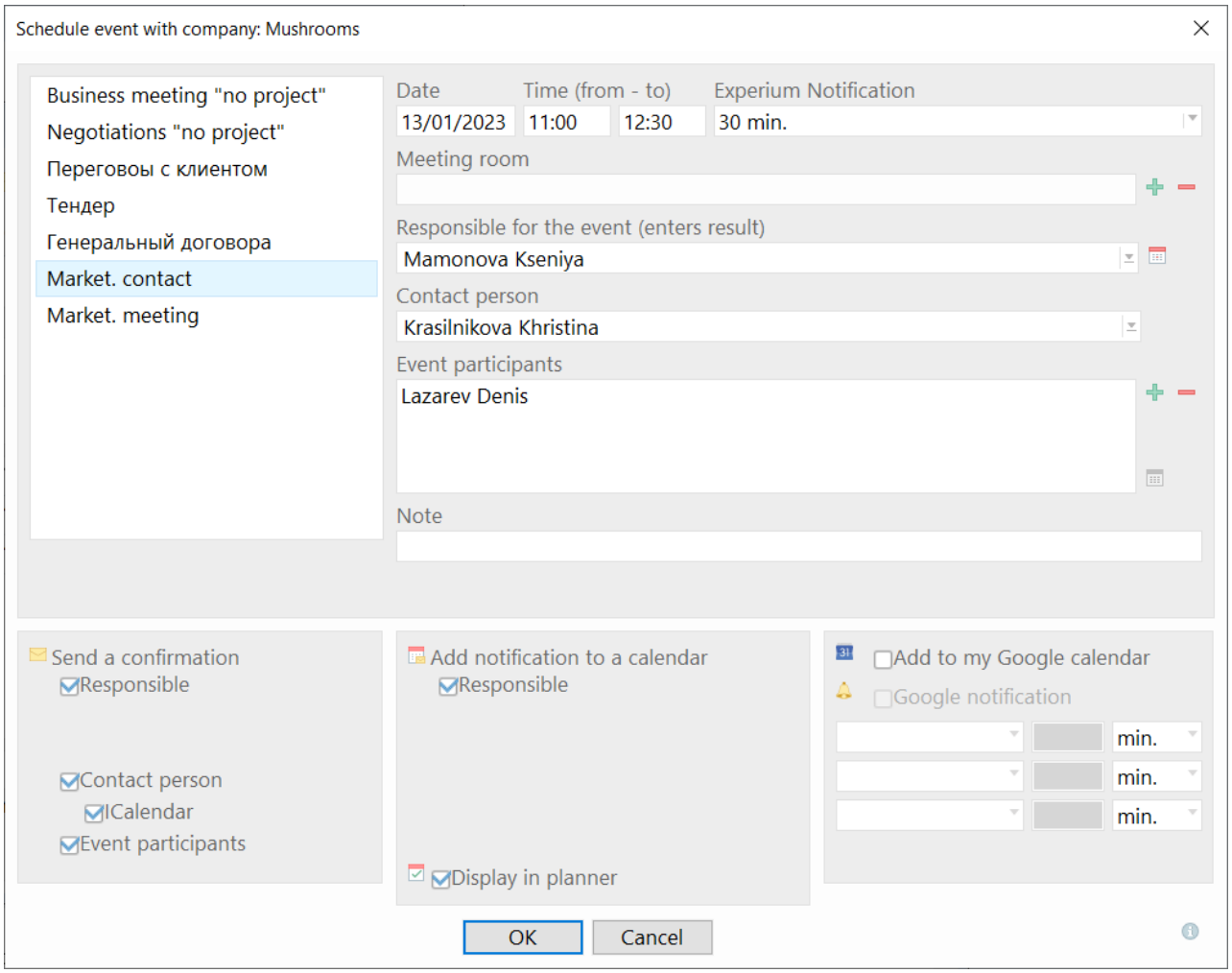


Fig. 36. Schedule marketing contact

For uploading all marketing contacts through the definite period of time:

on the program control panel click on the button **"Marketing"** and in the drop-down menu select a command **"Marketing contacts (summary)"**. In the opened window **"Marketing contacts"** indicate a full name of the user or group/subgroup of users as well as the date of the contact. (Fig. 37).

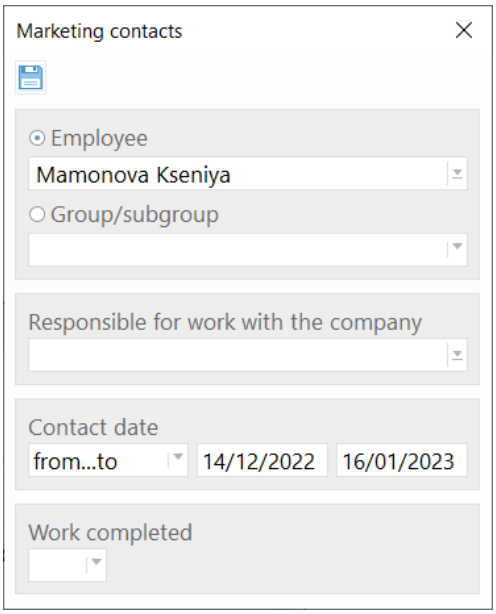
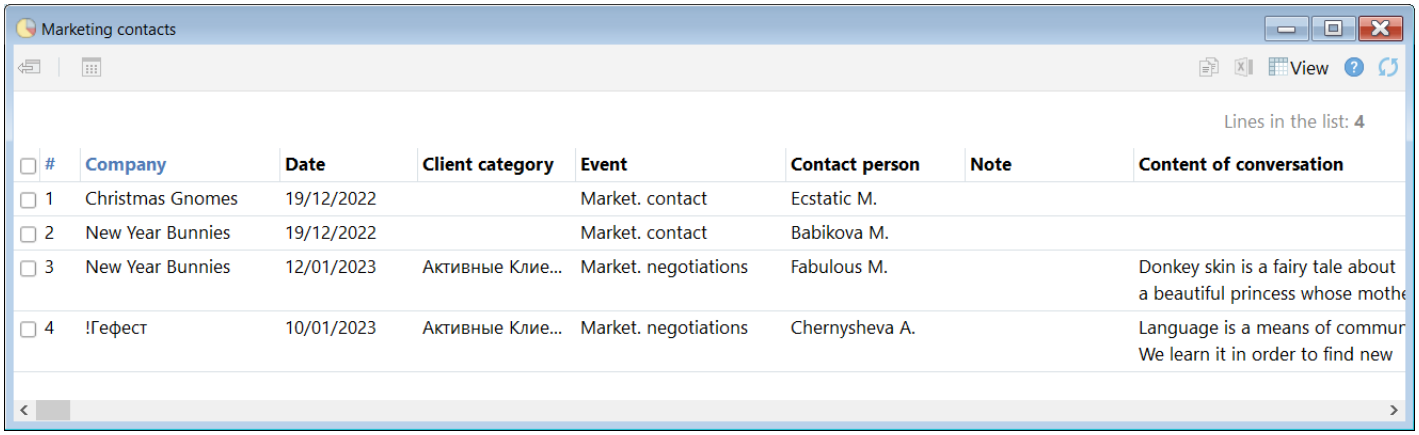


Fig. 37. Marketing contacts

The window **"Marketing contacts"** will be opened (Fig. 38).



#	Company	Date	Client category	Event	Contact person	Note	Content of conversation
1	Christmas Gnomes	19/12/2022		Market. contact	Ecstatic M.		
2	New Year Bunnies	19/12/2022		Market. contact	Babikova M.		
3	New Year Bunnies	12/01/2023	Активные Клие...	Market. negotiations	Fabulous M.		Donkey skin is a fairy tale about a beautiful princess whose mothe
4	!Гефест	10/01/2023	Активные Клие...	Market. negotiations	Chernysheva A.		Language is a means of commur We learn it in order to find new

Fig. 38. Marketing contacts

PENDING EVENTS

To look through the events which have already taken place but the result of which wasn't entered, in the **"Windows manager"** click on the button **"Pending events"**.

The Summary of all events without the results will be opened (Fig. 39).

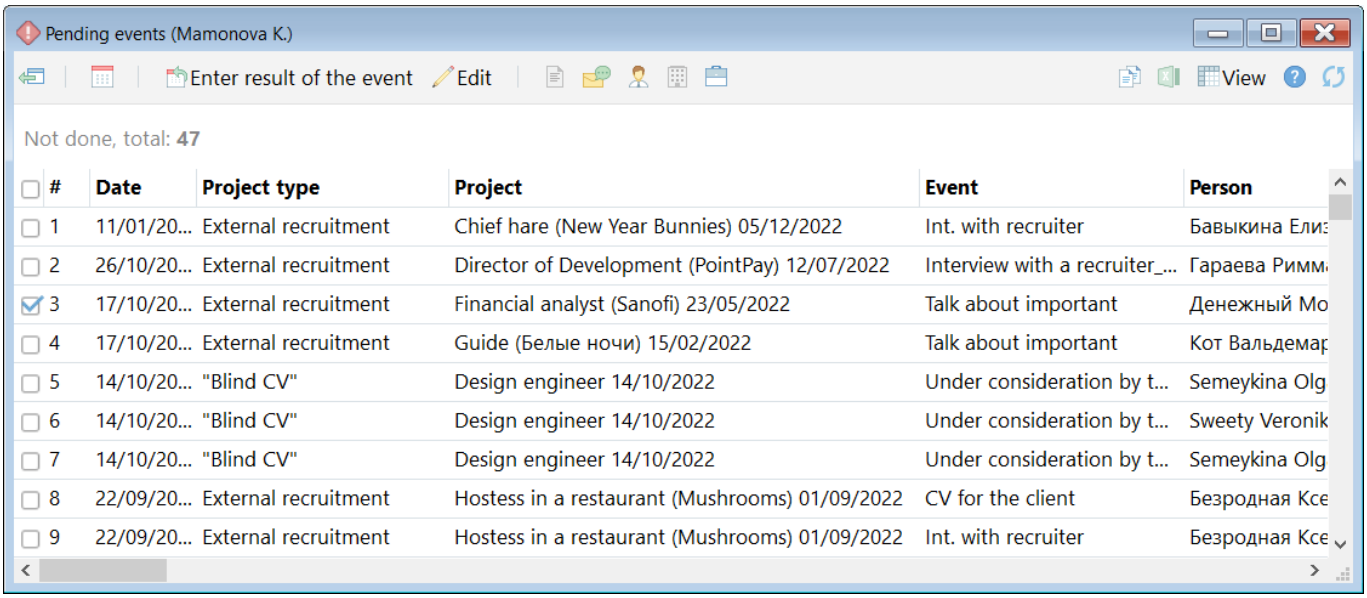


Fig. 39. Pending events

For adding the event's result:

in the opened window **"Pending events"** click with a right-mouse button in the column **"Event"** and in the drop-down menu select the command **"Enter result of the event"** (Fig. 40). A window for adding results will be opened in the workspace.

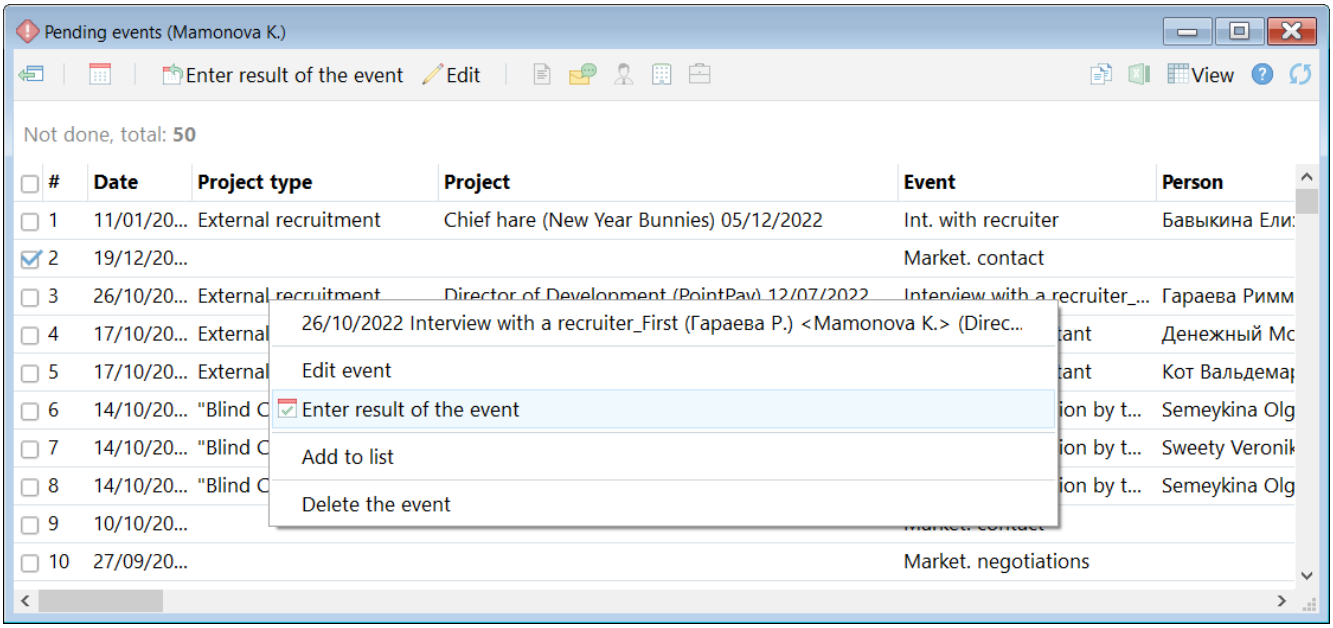


Fig. 40. Enter result of the event

CALENDAR

For the convenience of planning there is a calendar (Fig. 41) that can be synchronized with MS Outlook® and Google Calendars.

Using the calendar you can:

- Schedule events for yourself and for other users (meetings, interviews, phone conversation etc.);
- Set tasks for a day/ week/ any period of time.

Events that the user schedules from persons'/ companies'/ projects' cards and SearchWorkSheets will be displayed in the calendar automatically.

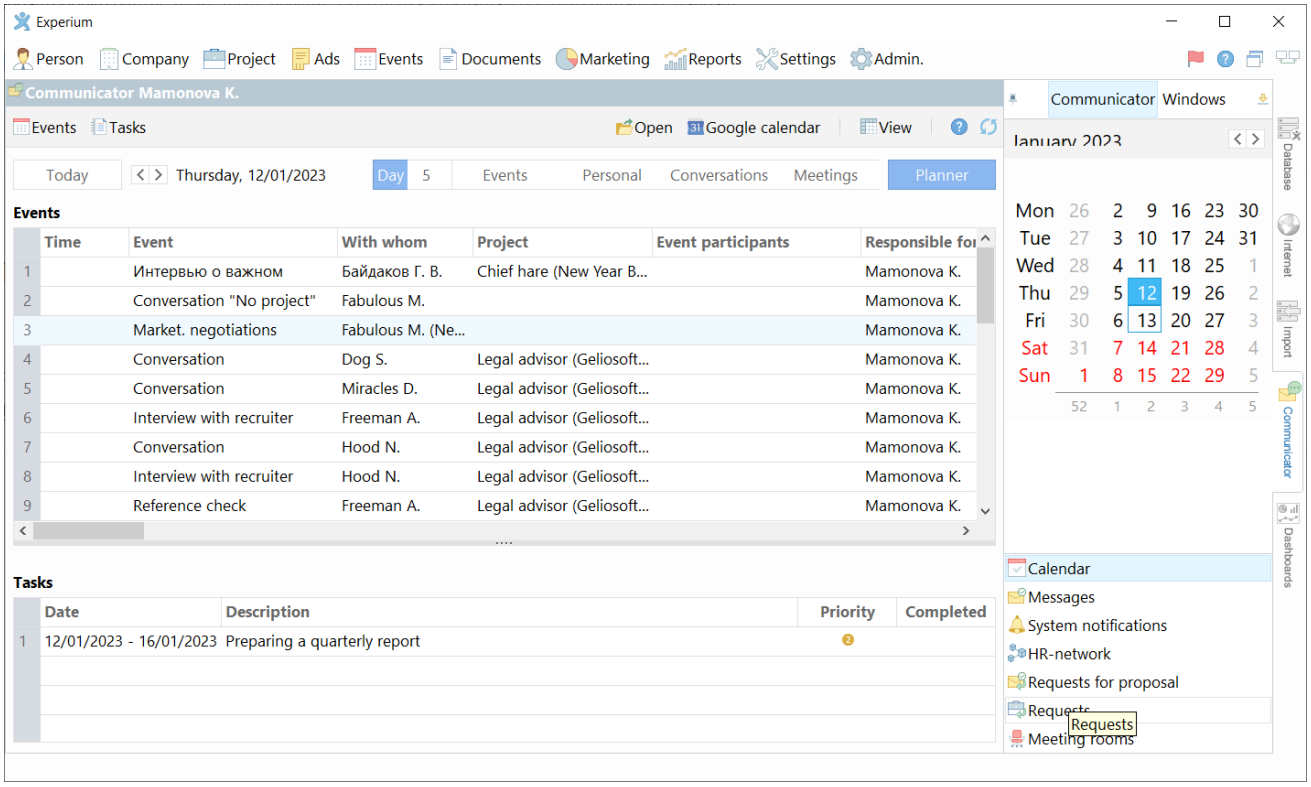


Fig. 41. Calendar

For scheduling an event to yourself:

open **"Calendar"**, click on the button **"Events"** to open the menu and choose **"Plan an event"**. Select date, time and enter description of the event in the open window (Fig. 42).

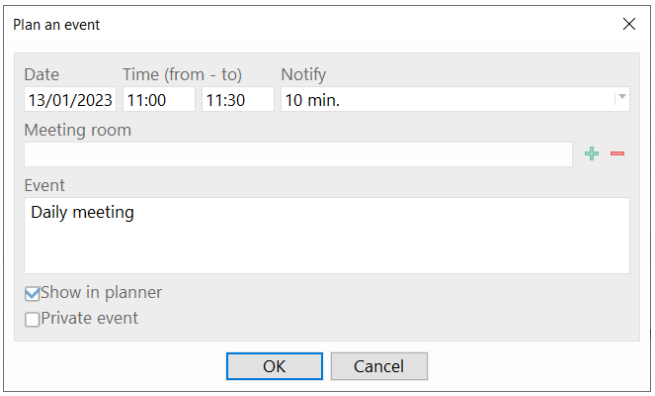


Fig. 42. Plan an event

CALENDAR

For scheduling an event to another user:

open **"Calendar"**, click on the button **"Events"** to open the menu and choose **"Add for colleague"**. Select colleague's name, date, time and enter description of the event in the opened window.

For setting a task:

open **"Calendar"**, click on the button **"Tasks"** to open the menu and choose **"New task"**. Enter description of the task and time in the opened window (Fig. 43).

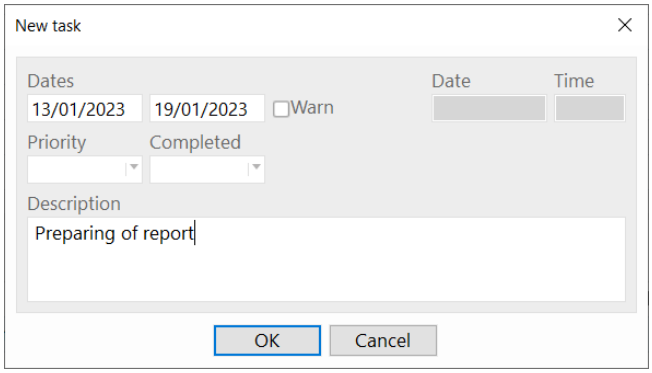


Fig. 43. New Task

For editing the task:

open **"Calendar"**, highlight the task that you need to edit. Click on the button **"Tasks"** to open the drop-down menu and choose **"Edit task"** (Fig. 44). The window **"Edit task"** will open. In order to mark the task as completed, put a sign **Y** (Yes) in the corresponding field.

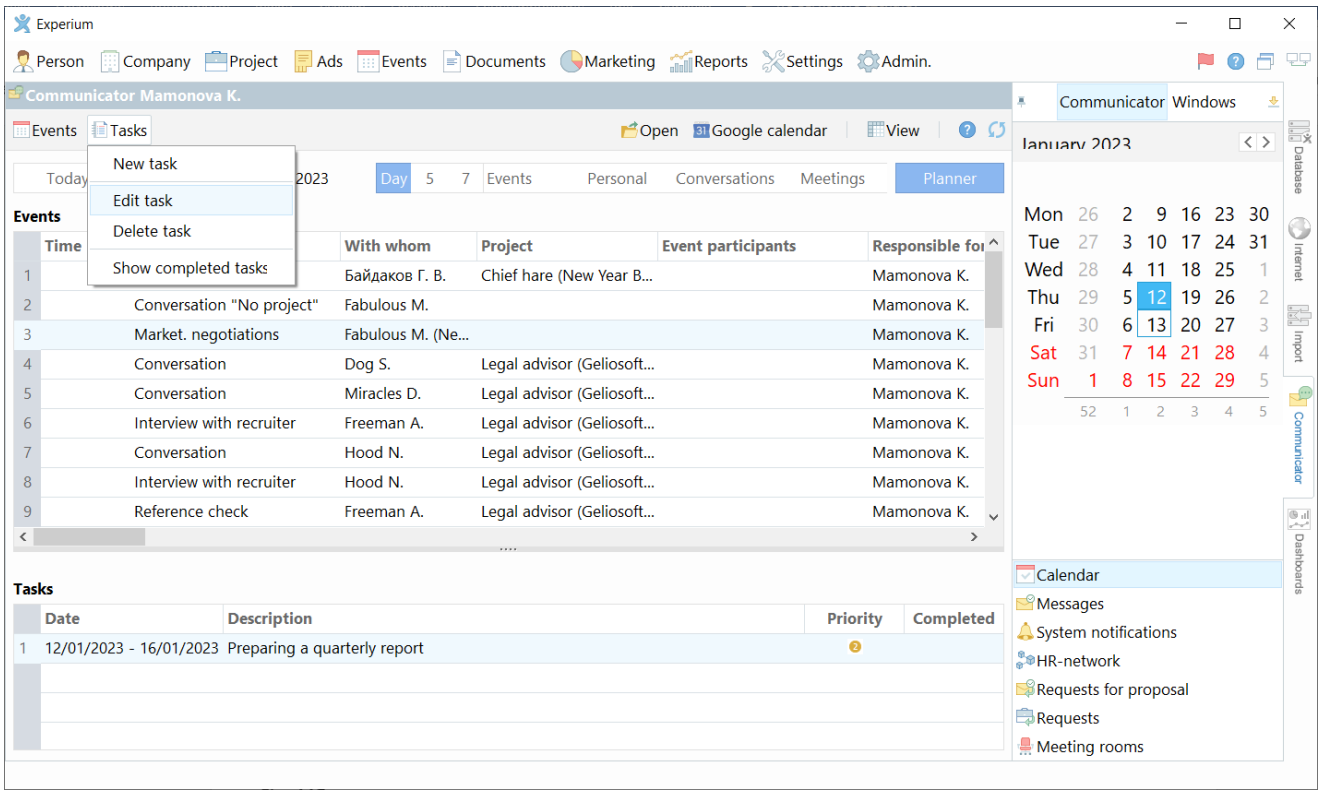


Fig. 44. Edit task

SYSTEM NOTIFICATIONS

"System notifications" – messages from the system that notify you about all activities with your projects: assignment as a responsible person/co-executor/ approver for the project, etc.

For viewing all the system notifications for a certain period:

click on the button **"Communicator"** in the right side panel and then click on the button **"System notifications"** in the right down corner of the opened window (Fig. 45).

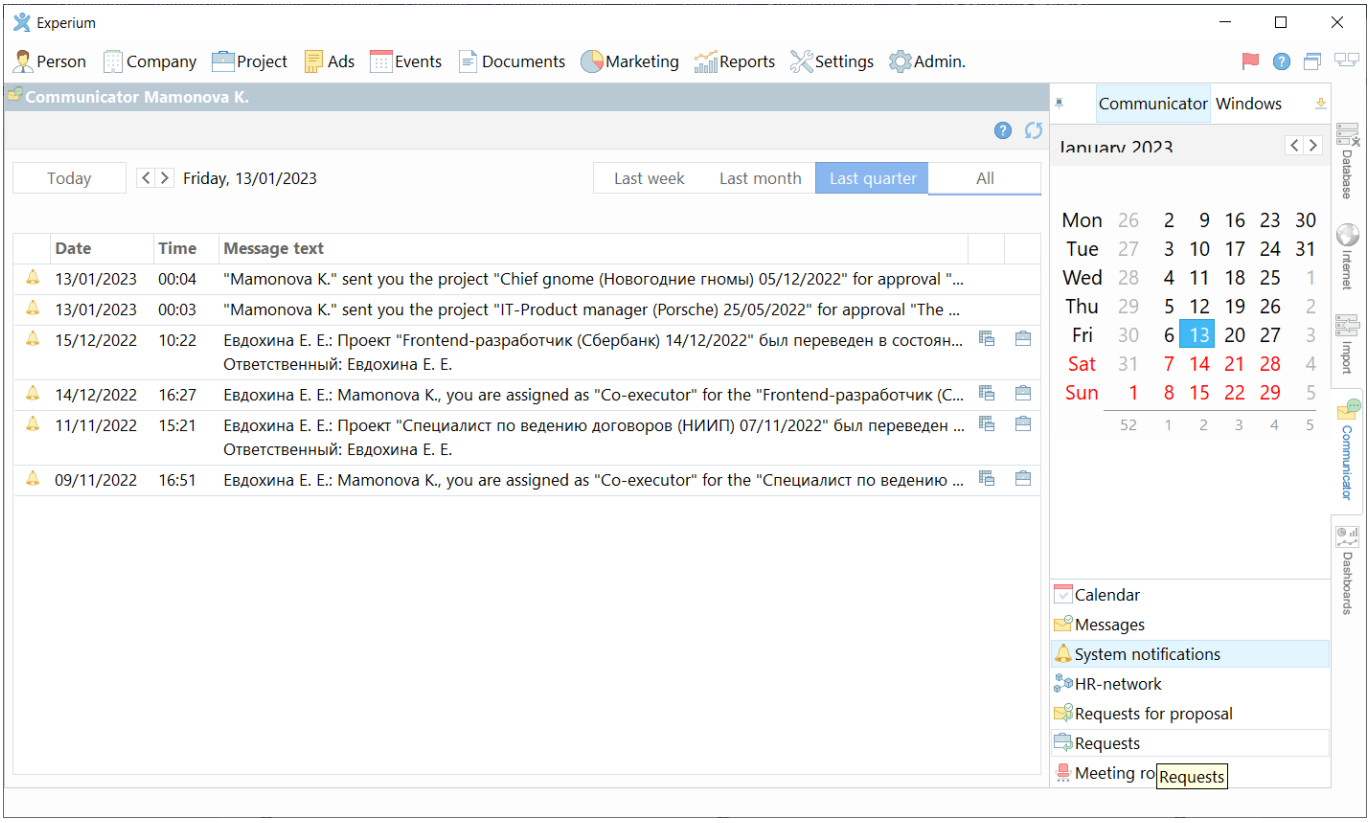


Fig. 45. System notifications

USERS' ROLES AND PERMISSIONS

There is an opportunity for distribution of main and optional roles for the users in the program.

The main roles are **Chief Administrator**, **HR Director, Director of company** and **System Administrator**. **Chief Administrator's** role can not be assigned to any users. **HR Director's, Director's of company** and **System Administrator's** roles can not be assigned to more than one user.

All the other roles are optional and can be assigned to several users. If it is necessary, you can edit the names of these roles and the preset permissions.

You can also delete optional roles and add new ones. It is possible to set permissions for every user individually regardless to the assigned role.

For setting permissions in the program individually:

click on the button **"Admin"** in the control panel of the program. Choose **"User profile"** in the drop-down menu. Then the window **"User (name)"** will be displayed on the screen. (Fig. 46).

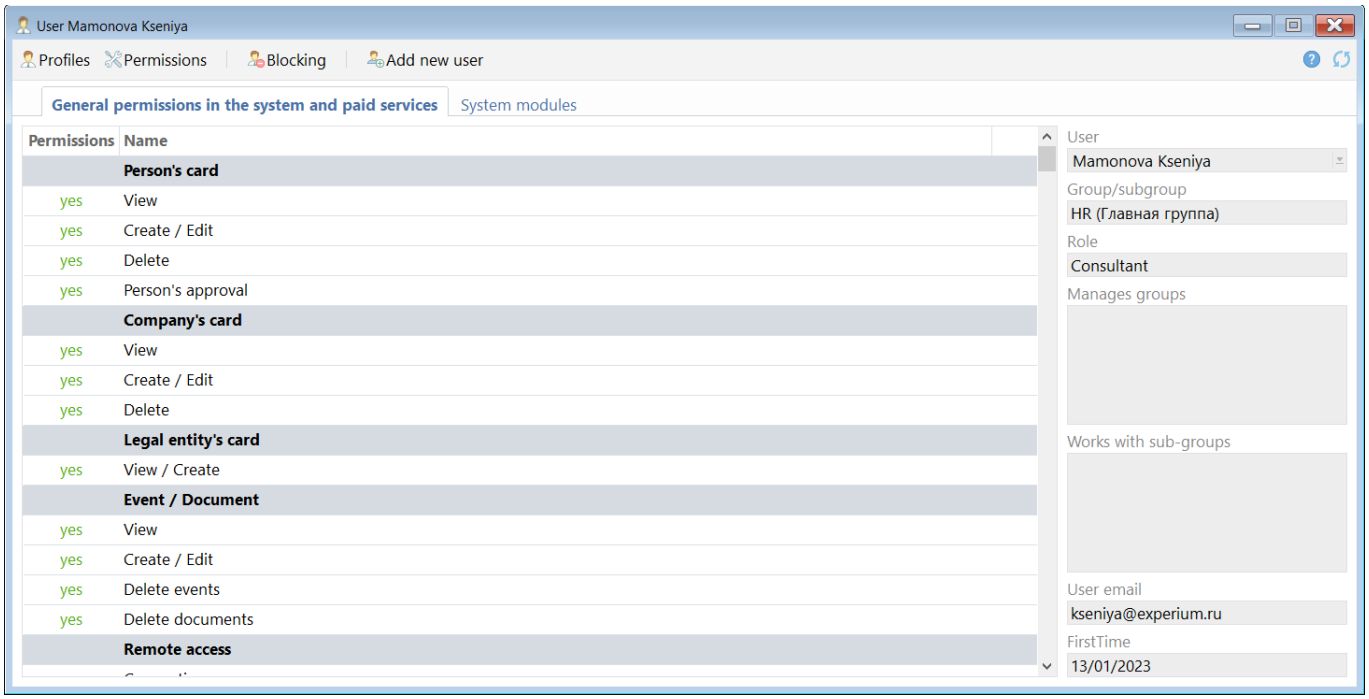


Fig. 46. User profile

USERS' ROLES AND PERMISSIONS

From the drop-down list in the field **"User"** choose the name of an employee whose program permissions you want to edit. Then click on the button **"Permissions"** in the left upper corner of the window and in the drop-down menu select **"Modify user permissions"**. The window **"Description of user (name) permissions"** will be opened, you can edit the preset user's permissions (Fig. 47).

Description of user Mamonova K. permissions

Save

General permissions in the system and paid services | System modules

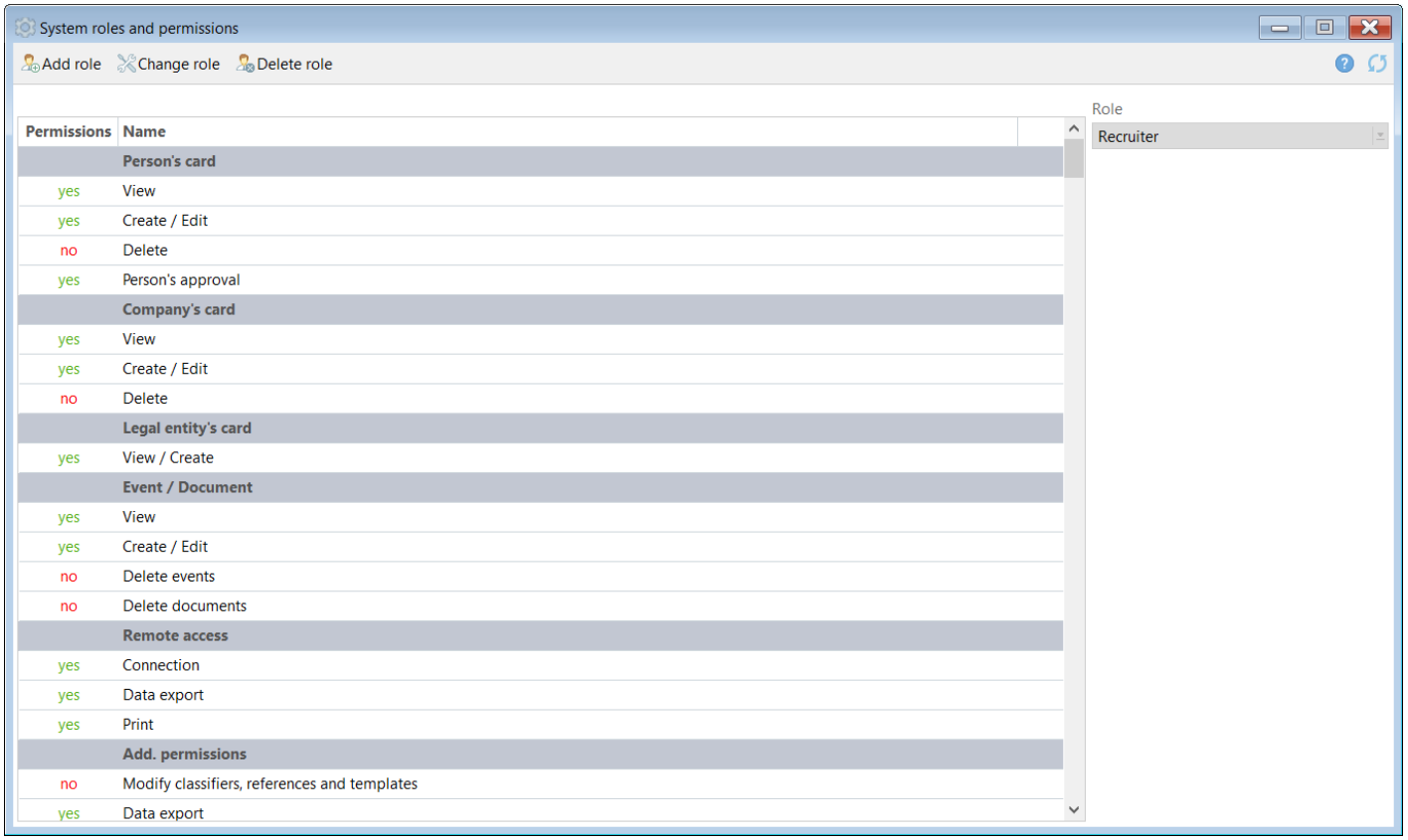
Name	YES for the User (regardless of the Role)	NO for the User (regardless of the Role)	Use from Role	Permissions for the role
Person's card				
View				yes
Create / Edit				yes
Delete				no
Person's approval				no
Company's card				
View				yes
Create / Edit				yes
Delete				no
Legal entity's card				
View / Create				yes
Event / Document				
View				yes
Create / Edit				yes
Delete events				no
Delete documents				no
Remote access				
Connection				yes
Data export				yes
Print				yes
Add. permissions				
Modify classifiers, references and templates				no

Fig. 47. Description of user permissions

For adding/editing or deleting a new role in the system:

click on the button **"Admin"** in the control panel of the program and choose **"System roles and permissions"** in the drop-down menu, in the opened window click on the button **"Add role"**/ **"Change role"**/ **"Delete role"** (Fig. 48). While adding/editing a role set a role's name and permissions.

USERS' ROLES AND PERMISSIONS



Permissions	Name
	Person's card
yes	View
yes	Create / Edit
no	Delete
yes	Person's approval
	Company's card
yes	View
yes	Create / Edit
no	Delete
	Legal entity's card
yes	View / Create
	Event / Document
yes	View
yes	Create / Edit
no	Delete events
no	Delete documents
	Remote access
yes	Connection
yes	Data export
yes	Print
	Add. permissions
no	Modify classifiers, references and templates
yes	Data export

Fig. 48. System roles and permissions

SEARCH

The program allows searching the following objects:

- people;
- companies;
- projects;
- events;
- ads;
- documents.

Object search is performed on the parameters set up in the search window (Fig. 49). The results of search are displayed as a list.

For searching in persons'/ companies'/ projects'/ events'/ documents' databases:

click on the appropriate button in the control panel and select **"Search"** in the drop-down menu.

Search in three main databases (people, companies, projects) can be performed not only on key phrases in the documents attached to the card but also by the card fields.

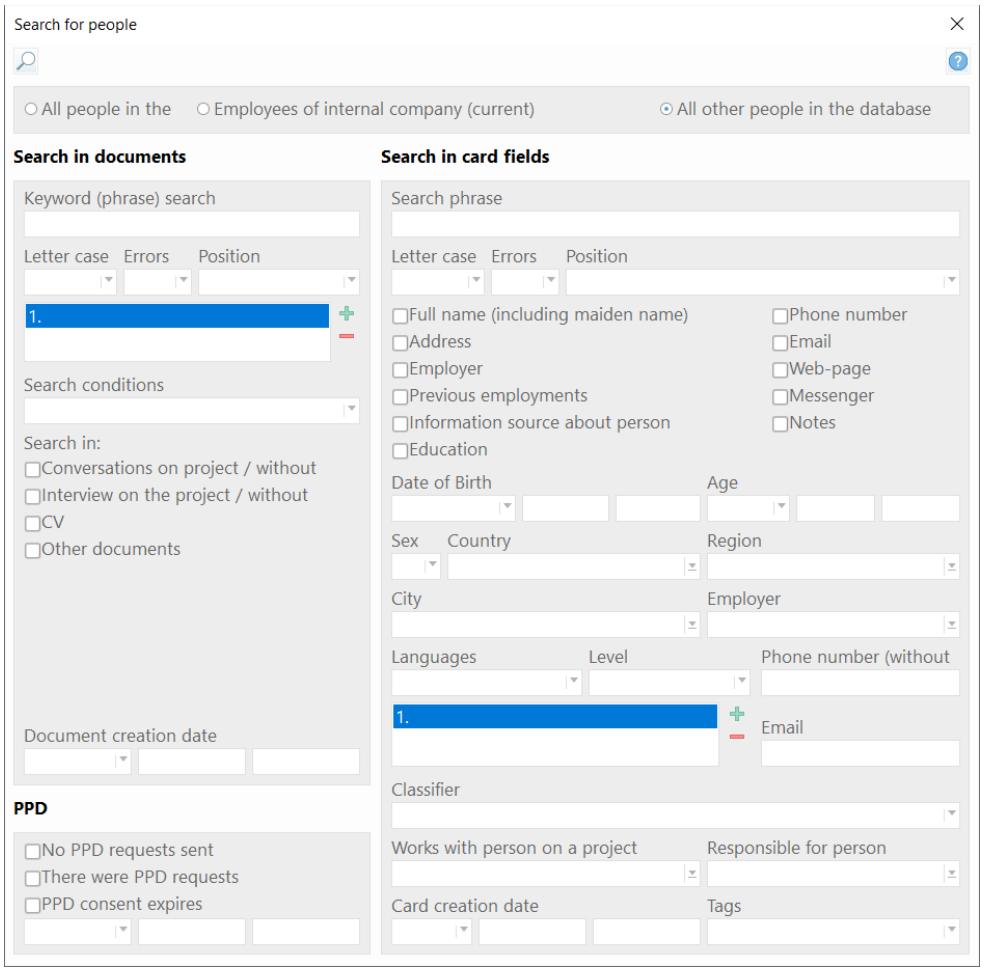


Fig. 49. Search for people

HOW TO CREATE A NEW LIST

Click on the button **"Person (Company/ Project/ Ads/ Events/ Documents)"** in the control panel of the program and choose **"Create a new list"**.

A blank window will be displayed in the workspace, which is intended for grouping of the search results from different windows (Fig. 50).

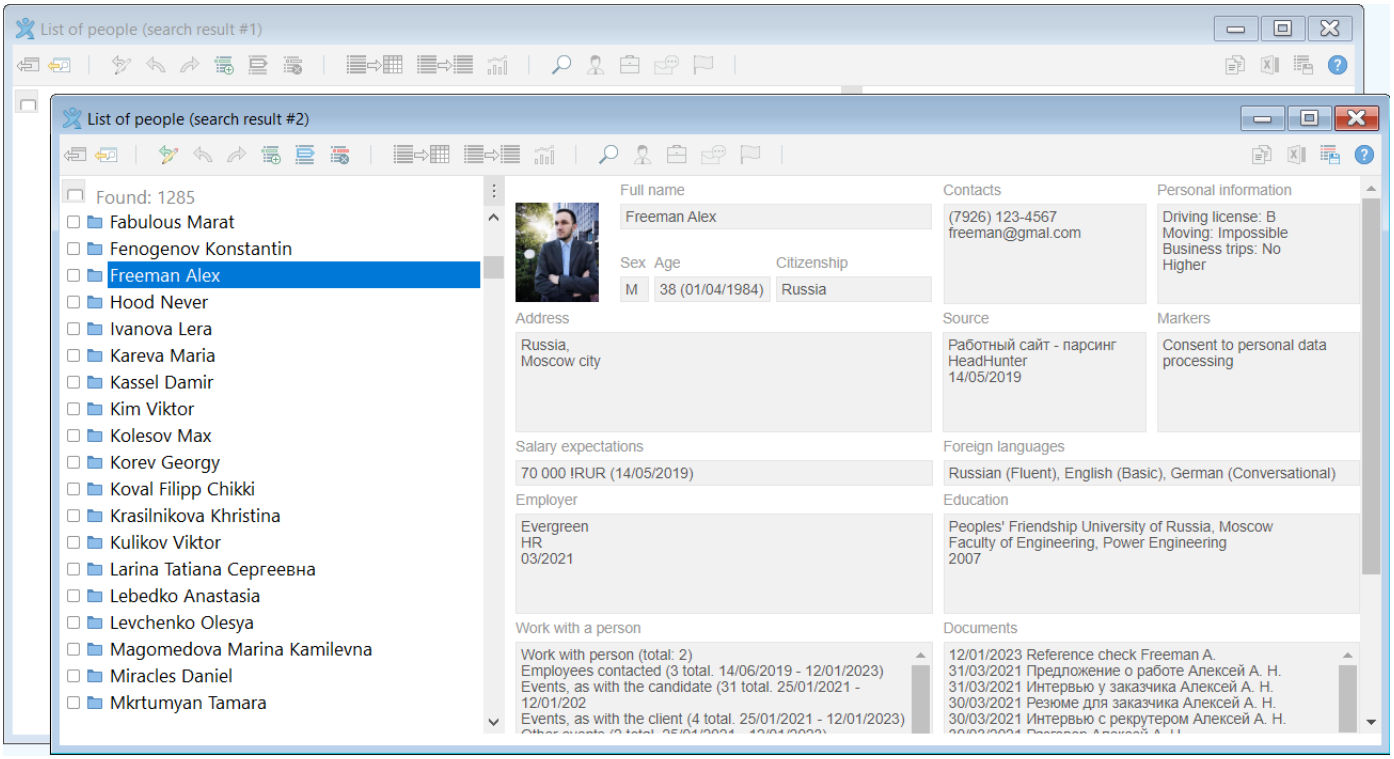


Fig. 50. List of people

For saving a list of people (companies/projects/ads/events/documents) highlight this list and in the right upper corner click the button **"Save list"** . In the opened window indicate the name of the user a list is being saved for and press "OK" (Fig. 51).

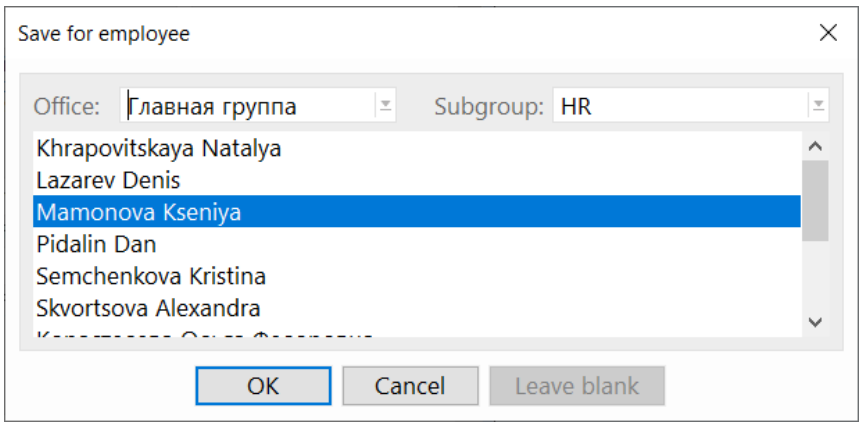


Fig. 51

HOW TO CREATE A NEW LIST

In the window **"List saving. Item name"** indicate a list name and press **"OK"** (Fig. 52).

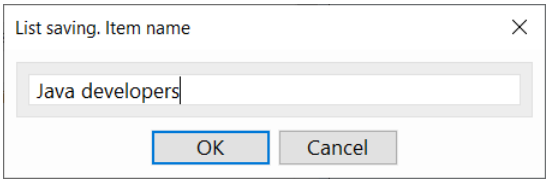


Fig. 52. List saving. Item name

For displaying a saved list of people (companies /documents /ads etc.):

in the program control panel click on the corresponding button and in the drop-down menu select a command **"My searches/ lists"**. In the opened window select a required list (Fig. 53).

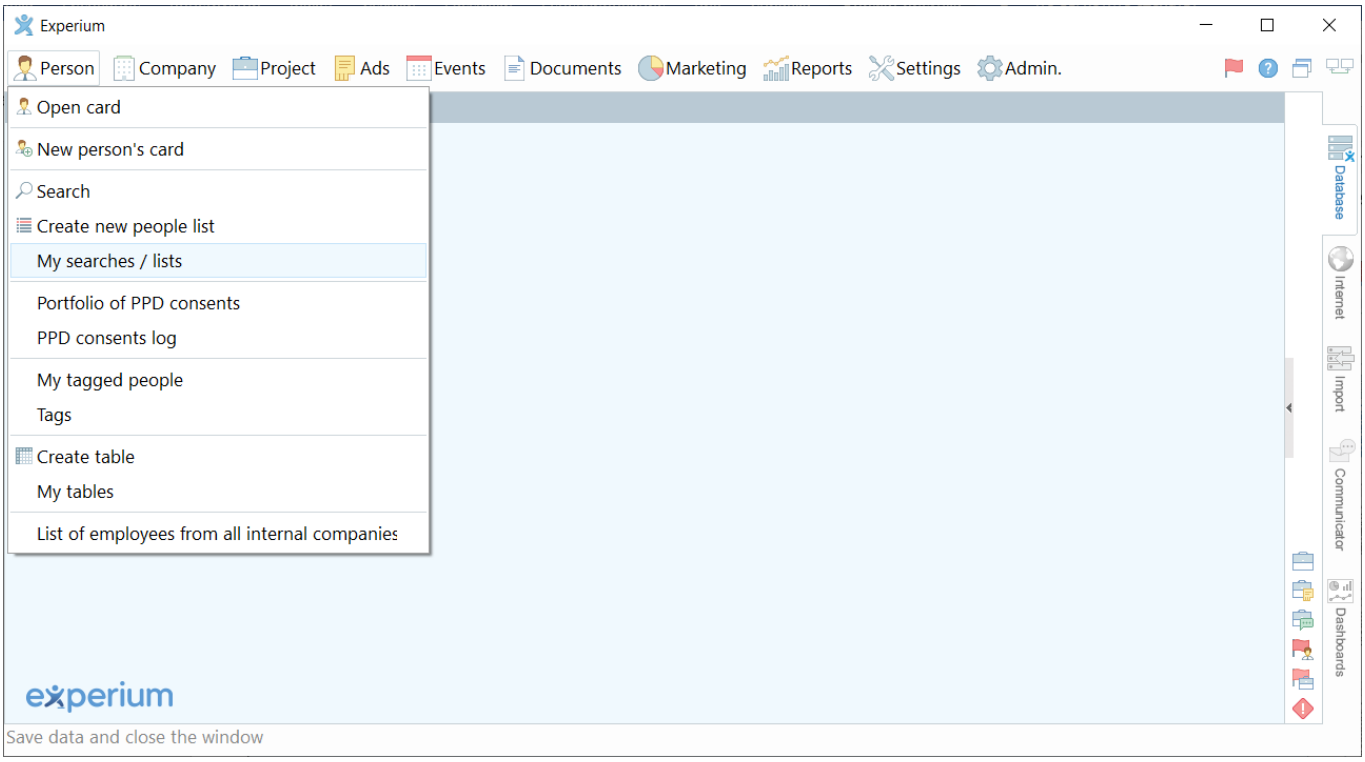


Fig. 53. My searches/ lists

REPORTS

The **"Reports"** module gives an opportunity to create **reports on projects**, **statistic reports**, **reports on work with recruitment agencies** and **reports on people in the SearchWorkSheet**. Report data can be grouped by responsible persons, user groups and other criterion. Data by more than 150 parameters can be uploaded to reports.

Each user can create reports by any parameters. For that in **the Program Control Panel** click on the button **"Reports"** and in the drop-down menu select a required type. In the opened window click on the button **"New"** (Fig. 54) and select required parameters for a report.

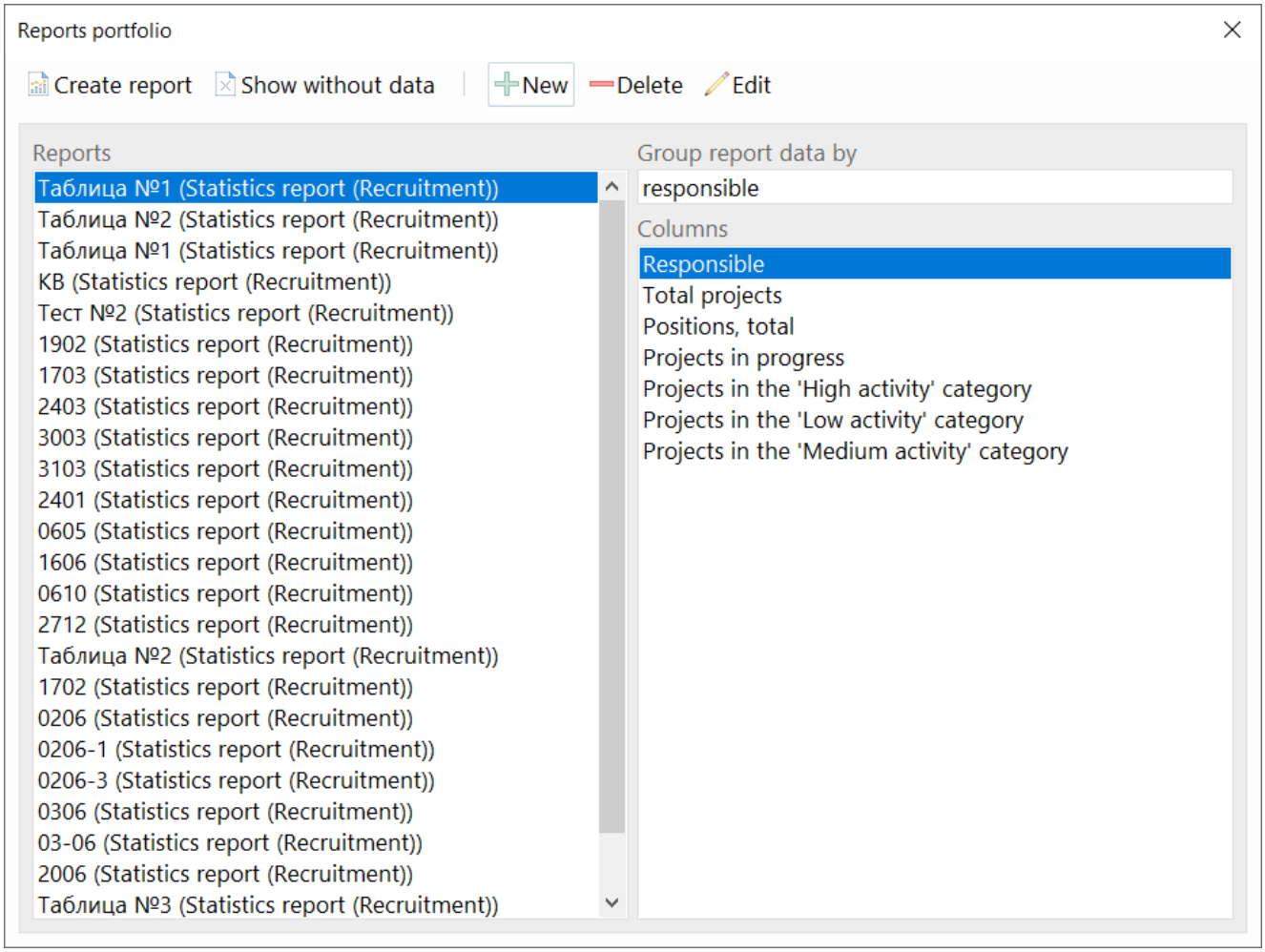
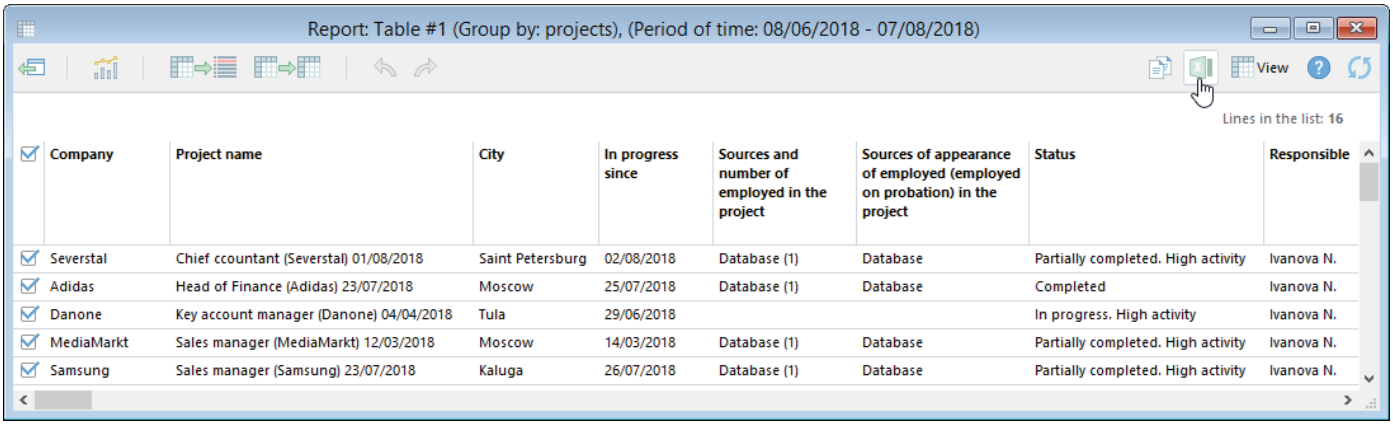


Fig. 54. Reports portfolio

If you want to create a report template which will be available for all users, enter the program using account of the **Chief Administrator** and set required parameters for a report. Save this report template and it will be displayed in the **Report Portfolio** for all users of the program.

Created reports can be exported to Excel in their original format (Fig. 55).



Report: Table #1 (Group by: projects), (Period of time: 08/06/2018 - 07/08/2018)

View

Lines in the list: 16

Company	Project name	City	In progress since	Sources and number of employed in the project	Sources of appearance of employed (employed on probation) in the project	Status	Responsible
Severstal	Chief ccountant (Severstal) 01/08/2018	Saint Petersburg	02/08/2018	Database (1)	Database	Partially completed. High activity	Ivanova N.
Adidas	Head of Finance (Adidas) 23/07/2018	Moscow	25/07/2018	Database (1)	Database	Completed	Ivanova N.
Danone	Key account manager (Danone) 04/04/2018	Tula	29/06/2018			In progress. High activity	Ivanova N.
MediaMarkt	Sales manager (MediaMarkt) 12/03/2018	Moscow	14/03/2018	Database (1)	Database	Partially completed. High activity	Ivanova N.
Samsung	Sales manager (Samsung) 23/07/2018	Kaluga	26/07/2018	Database (1)	Database	Partially completed. High activity	Ivanova N.

Fig. 55. Report

Report "Individual Workload"

Report **"Individual Workload"** gives an opportunity to monitor employees' efficiency through the definite period of time.

To upload the report "Individual Workload":

in the program control panel click on the button **"Reports"** and in the drop-down menu select a command **"Reports about projects" -> "Individual Workload"**. In the opened window **"Summary settings"** indicate an enumeration period and the name of the employee or a group of employees (Fig. 56).

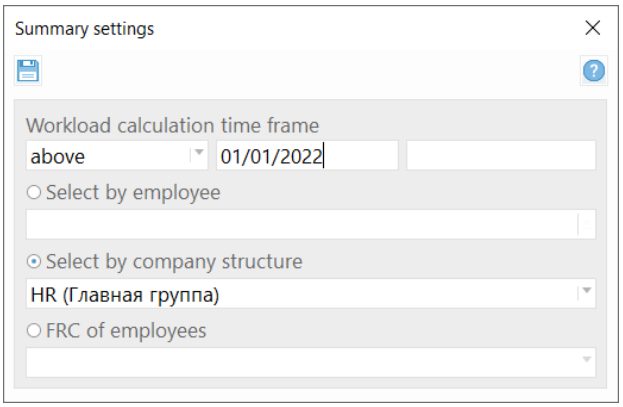
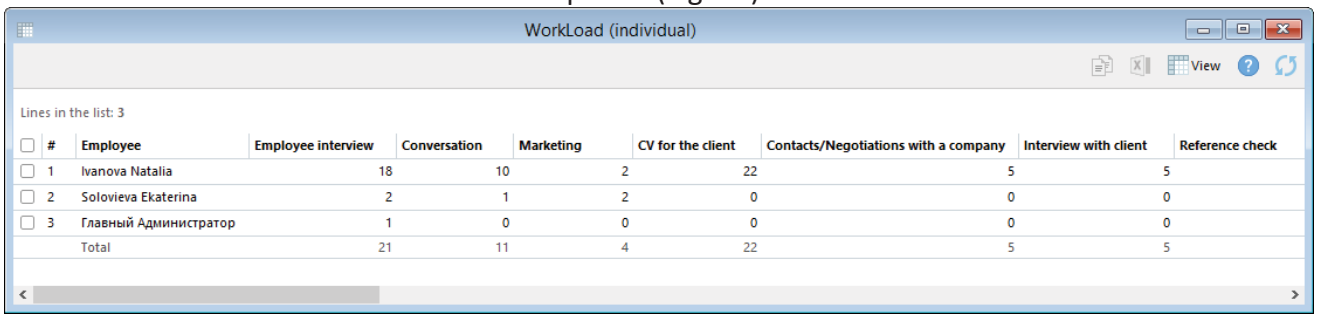


Fig. 56. Summary settings

The window **"Individual WorkLoad"** will be opened (Fig. 57).



WorkLoad (individual)

View

Lines in the list: 3

#	Employee	Employee interview	Conversation	Marketing	CV for the client	Contacts/Negotiations with a company	Interview with client	Reference check
1	Ivanova Natalia	18	10	2	22	5	5	
2	Solovieva Ekaterina	2	1	2	0	0	0	
3	Главный Администратор	1	0	0	0	0	0	
	Total	21	11	4	22	5	5	

Fig. 57. Individual WorkLoad

Report "Work on projects"

Report "Work on projects" allows monitoring employees' efficiency within the work on each separate project.

To upload a report "Work on projects", in the program control panel click on the button **"Reports"** and in the drop-down menu select a command **"Reports about projects" -> "Work on projects"**. In the opened window **"Summary settings"** indicate a period of work on projects, projects status, name of an executor and the name of the client company (Fig. 58).

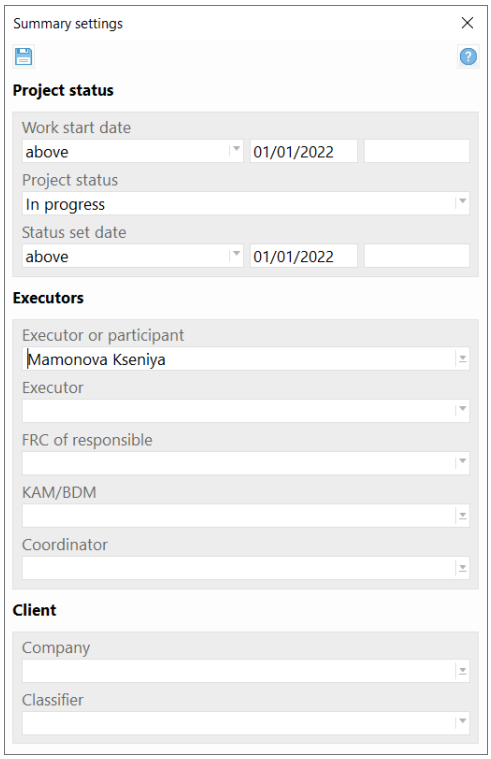
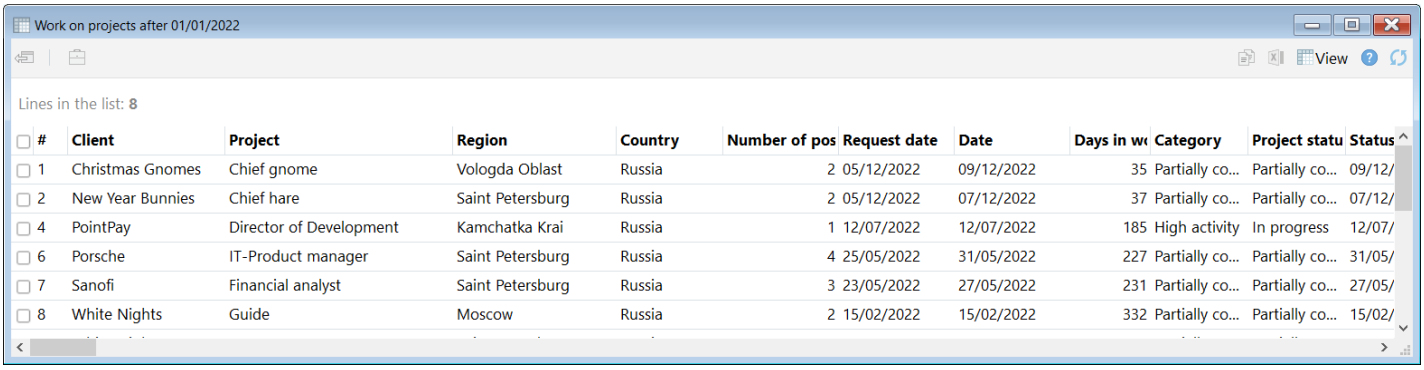


Fig. 58. Summary settings

The window **"Work on projects"** will be opened (Fig. 59).



#	Client	Project	Region	Country	Number of pos	Request date	Date	Days in w	Category	Project statu	Status
1	Christmas Gnomes	Chief gnome	Vologda Oblast	Russia	2	05/12/2022	09/12/2022	35	Partially co...	Partially co...	09/12/
2	New Year Bunnies	Chief hare	Saint Petersburg	Russia	2	05/12/2022	07/12/2022	37	Partially co...	Partially co...	07/12/
4	PointPay	Director of Development	Kamchatka Krai	Russia	1	12/07/2022	12/07/2022	185	High activity	In progress	12/07/
6	Porsche	IT-Product manager	Saint Petersburg	Russia	4	25/05/2022	31/05/2022	227	Partially co...	Partially co...	31/05/
7	Sanofi	Financial analyst	Saint Petersburg	Russia	3	23/05/2022	27/05/2022	231	Partially co...	Partially co...	27/05/
8	White Nights	Guide	Moscow	Russia	2	15/02/2022	15/02/2022	332	Partially co...	Partially co...	15/02/

Fig. 59. Work on projects report

For setting criterion of efficiency for the report with red numbers it is required to make the following settings: Chief Administrator -> Settings -> Document forms and operational reports.

In the opened window select type of a report **"Work on projects"** and indicate (Fig. 60):

- max number of days until "In progress" status;
- max number of days without candidates;
- min number of candidates;
- max number of days without interviews.

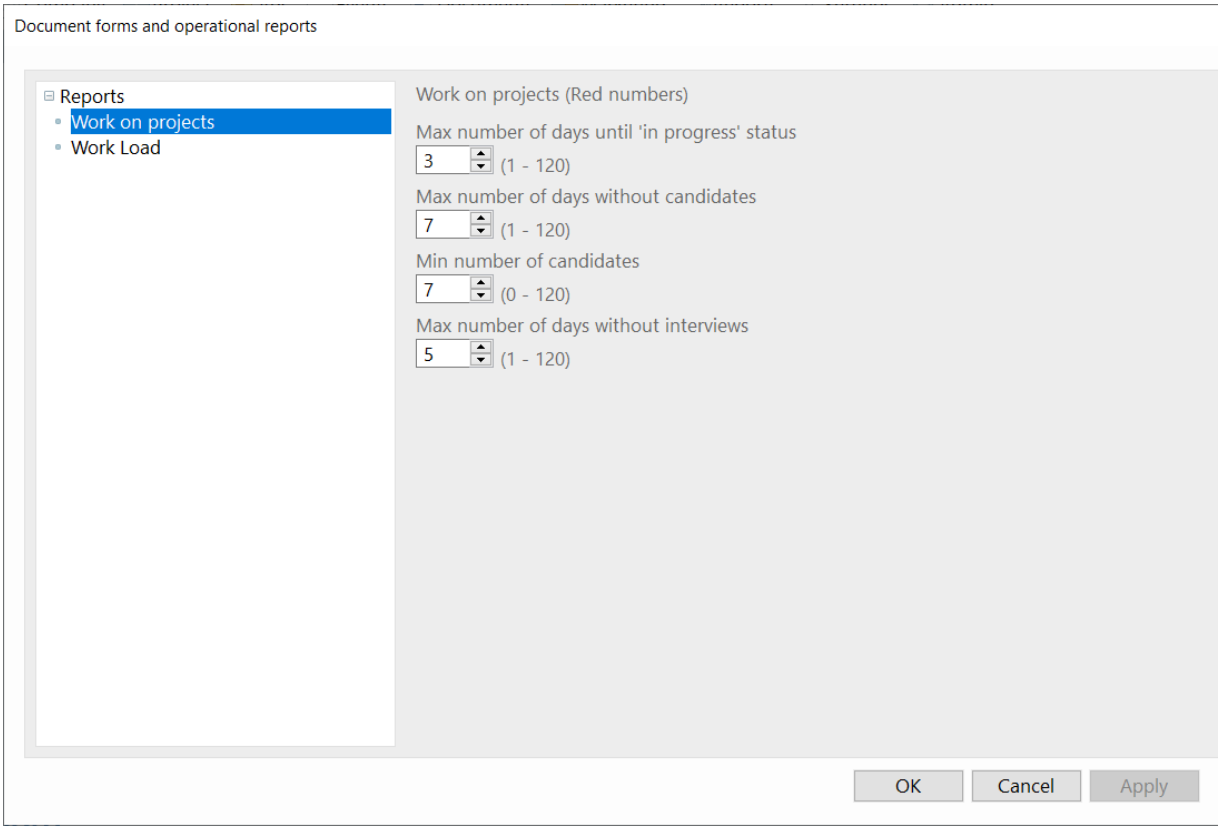


Fig. 60. Settings for operational reports

DASHBOARDS

Dashboards allow you to generate **statistical reports on Recruitment projects in the form of diagrams.**

To create a dashboard template, go to the right side panel of the program, the **"Dashboards"** tab.

In the opened workspace, click the **"Add block"** button. In order to customize the diagram for this block, select **"Click to customize the diagram"** in the opened workspace. Then you can select any parameters from the report and customize the appearance of the charts (Fig. 61). Add as many blocks of information as you need and customize the look for each.

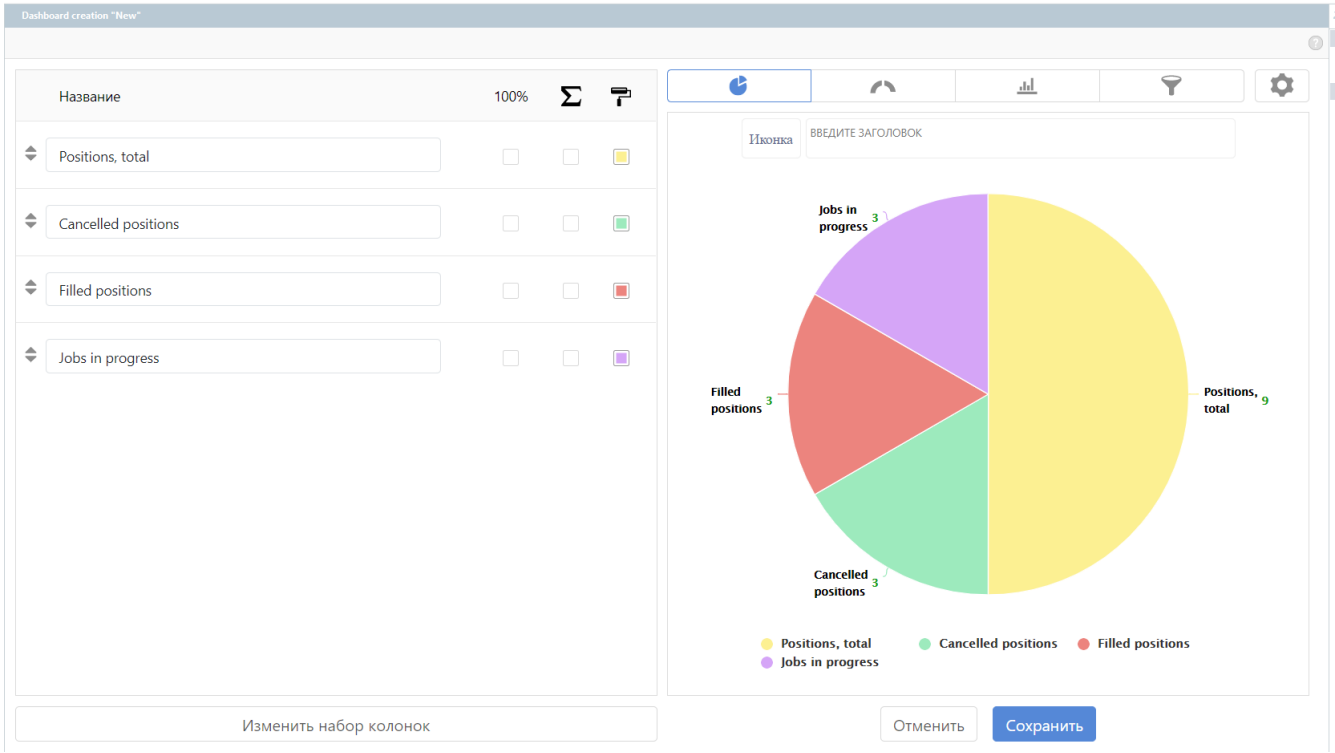


Fig. 61. Customizing the appearance of the Dashboard template

DASHBOARDS

In order to generate a dashboard with data, select the required template in the list and click the **"Generate Dashboard"** button at the top of the workspace.

The generated dashboards can be sent in pdf format or printed (Fig. 62).

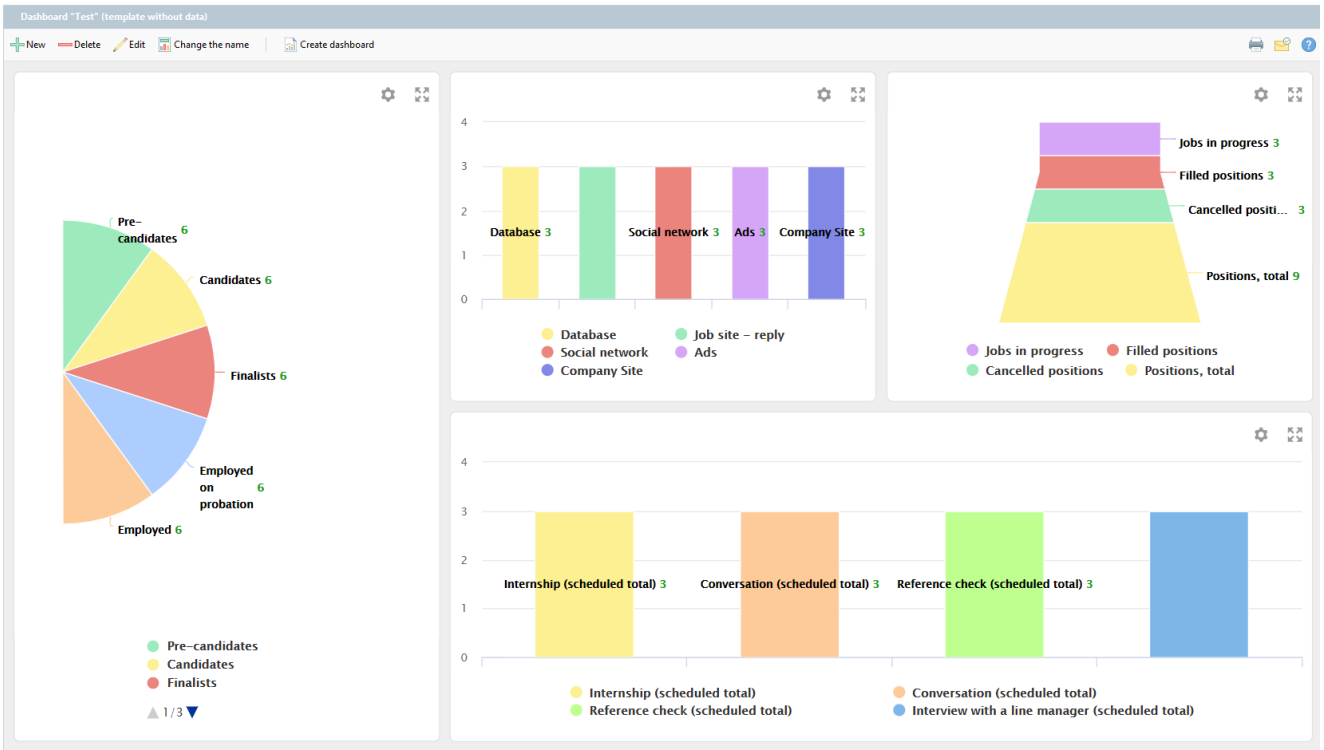


Fig. 62. Dashboard formation

CONCLUSION

Thanks for reading this guide on working with Experium software!

- If you have unanswered questions, please, contact us: **+7 (495) 783-66-03**
- If you have any feedback on the program, please, send us an e-mail to **info@experium.ru**

WE CREATE A PROGRAM FOR PROFESSIONALS WITH PROFESSIONALS!