PERFORM ZONE USER MANUAL

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Contents

BASICS

How do I navigate?

On the left hand side there is a menu that allows you to open up the main areas of Perform Zone from wherever you are at the time. Clicking back to the area you were in prior will take you back to screen you were also working on prior.

Where you see a table with columns, you can activate a short cut menu by double left mouse clicking within the table. You can close that menu down by pressing escape on your keyboard.

In most screens, there is an ACTION button that allows you to apply actions to all the data listed on screen at the time, as well as a few other actions that are relevant to the area you are in.

In most screens there is a SEARCH button at the top of the screen. This toggles the hiding and showing of your search options.

When looking at a list of data, you can Reportshyperlink to some screens by selecting the cell. For example you can open up an Employers profile by clicking on the employers name within your jobs list view. Hyperlinked cells have their text in blue and the cell background changes to blue when you hover over them.

When sending an email, you can, whilst in the middle of drafting your email, click on the left hand menu. Your email is minimized and accessible at the bottom of your screen.

How do I customise the layout of my lists?

How do I hide or show columns in my lists?
1. Press the Tick icon next to the SEARCH button
2. Select the columns that you would like to hide or show

Press the tick again to hide the Column Chooser list

How do I sort my columns?
Click on the column header. This will sort your list from lowest to highest.
Clicking again will sort the column in the other direction.
The list will return to the default sort when you exit and return to the list view

How do I edit the width of my list columns?
1. Place your cursor over the gap between the column headers and move until the expand option appears.
2. Click the expand option and keep your mouse button down as you slide the width to make it wider or narrower.

How do I move columns?
1. Click and hold your mouse button down on the columns that you wish to move.
2. Drag it the spot you want it to be.

Your column will remain where it is for the next time that you log in.
This affects only the user who made the edit.

How do I hide and show fields in my forms?

Perform Zone has a suite of core fields available to all clients of Perform Zone. You can add new ones in some forms.

To hide/show core fields, email support@performzone.com, this is a free service.
To add new fields that you want to search on there may be a cost depending on if you want to apply rules to the fields. If not, in most cases it will also be free.

How do I undelete / restore a deleted job, candidate, employer or contact?

1. Press ACTION, select Restore
2. Select the item to Restore and press RESTORE

I can't find a candidate / employer / job or contact

Below are a several suggestions to what may be occurring.

- Press "Clear" in the search options and try again.
- Try searching on partial matches to email (such as the domain).
- Use the wildcard "%" in the keyword box.
- You may have deleted the data.
  To check, click the Recycle Bin Icon.
  You can restore undeleted data from here as well.
- Your user settings have a specific country set to show search results only on, and your missing data does not have a country assigned.
  If your search column has a location set, such as Australasia showing in blue, then your settings have been assigned by your admin person.
  Clear the region in your search and try again.

How do I refresh / update my screen?

Pressing the X in the keyword search will refresh your list.

I saved data, but no-one else can see it.
The short answer is they can see it once they refresh the data in that screen.
When you enter data in any screen it is cached in your computer until you save it.

It then goes into your database.
If someone else opens the same screen as you (say a candidate profile) before you have saved your data, they will be looking at their own cache locally.
They won't see what you have saved unless they refresh their own cache.
To refresh the cache they need to open a different candidates profile and then back to the first candidate.
If they save their data after you saved your then your data will be copied over by their entry.

How does the spell checker work?

Incorrectly spelt words will have a red line below them.
Click on the word and a selection of words will appear from your PC's dictionary.
The red line does not appear in the email or advert editor.
To activate the spell checker in the editor, select the spell check button from within the editor toolbar.

My spell checker does not work
Most likely something in the browser crashed.
Restart your internet browser.
If that does not fix it, re-install flash.
If still not working call Perform Zone support.

How do I add a comment?

Comments can be added Jobs, Employers, employer contacts and candidates.

In your lists Job, Employers, contacts or candidate:

1. Either:
   Double Left mouse click on the row that you are wanting to add a comment to.
   or
   Select the row and then select COMMENT from the ACTION button options
2. Select COMMENT from the pop up that appears, enter your comment and then press save.

In your Job, Employers, contacts or candidate profile,

1. select the NOTES tab
2. Either:
   Press the ADD COMMENT button
   or
   Double Left mouse in the notes table and select NEW from the pop up that appears.

How do I edit a comment?

You can't edit emails or sms comments, but you can edit all others.
If you have a task associated to the comment, it will also be updated with your edits.

1. Locate and highlight your comment from the Notes tab.
2. Double left mouse click on the comment.
3. Select "OPEN" from within the pop-up that appear.

How do I delete a comment?

If you have a Task associated to the comment, it will also be deleted.

1. Locate and highlight your comment from the Notes tab.
2. Double left mouse click on the comment.
3. Select "Delete" from within the pop-up that appear.

How do I see deleted comments?

1. Locate and highlight your comment from the Notes tab.
2. Select "Deleted Comments" from the Show: drop down.

How do I restore a deleted comment?

1.   Locate and highlight your comment from the Notes tab.
2. Select "Deleted Comments" from the Show: drop down.
3. Double left mouse clicking on the comment and press "Restore".
    This puts the comment back into your Active comments list.

About Stakeholders

A stakeholder is the user who has 'ownership' of an employer, candidate, contact or job.
It is automatically set to the user who created the profile.
There can be more than one stakeholder per employer, contact or candidate.

A job can have up three stakeholders.
1. Account Manager: The user responsible for placing candidates
2. Resourcer: The user responsible for sourcing and screening applicants
3. BDM: The User responsible for sourcing the vacancy.

The Resourcer and BDM drop down fields only become visible in the Job details page if the
Show Recruiter Fields or Job Qualifier features have been activated.

Users that assigned either as the jobs Account Manager or Resourcer will have that job
appear in their My Jobs list.

When a User is assigned as an Account Manager or a BDM to a job that the User is automatically assigned as the stakeholder for the Job's Employer and job's contacts.
If the AM and BDM fields are edited, Perform Zone keeps the initial stakeholders and adds the new ones.
If the jobs contacts are edited, their stakeholders are also updated. This saves you some housekeeping when generating marketing campaigns.

To see the candidates that you are a stakeholder of, left click the Candidates tab on the left hand side of the screen and then left click the My Candidates sub tab.

To see the employers that you are a stakeholder of, left click the Employers tab on the left hand side. Then left click the History drop down menu and select My Employers.

How do I remove Stakeholders?

1. In the Stakeholders field, double left click on a stakeholder and select DELETE

How do I upload a photo against a profile?

You can store a photo against a candidate, contact and User by clicking on the image icon in their profile and loading up a photo.
They appear on in their profile page.
Candidates can use the My Site to upload their own photo.

How do I look at a person's social media pages?

Within a Candidates and a Contacts profile there is a LinkedIn button that opens up their linked in account. If you're connected to them and logged in to LinkedIn, their linked account will appear.

There is also a google icon in their profile that will open up an internet tab with their google search results.

About Mandatory fields

Some forms require data entered before they will save.
Perform Zone requires the name and primary email address as a minimum for a person, and Trading name for an employer. This is to ensure clean data for importing.
You can save a job without filing any fields out if the job status is set at anything except Active.
You can also set your own fields as mandatory in the Settings area.

Mandatory fields are shown with an asterisk next to the field.

JOBS

How do I add a new job?

There are a few ways you can do this.

From the JOBS list
Click the ACTION button and Select NEW JOB

Or

Within the Jobs List area, double left mouse click and select the NEW option from the pop up that appears.

From the within EMPLOYERS profile
This will pre-populate your Job Detail form with your Employers details, such as Company name, Profile, web site, percentage fee, and address.

1. Within the Employers profile, click the JOBS tab.
2. Double click within the Jobs Current & Past and select NEW from the pop up that appears.

From within the employer CONTACTS profile
This will pre-populate your Job Detail form with your Employers and Contacts details, such as Company name, Profile, web site, percentage fee, address and contacts name.

1. Within the Employers profile, click the JOBS tab.
2. Double click within the Jobs Current & Past and select NEW from the pop up that appears.

How do I search for jobs?

1. Click on JOBS within the left hand menu.
2. Click the SEARCH button
3. Make your selections from the SEARCH options available.

Clicking SEARCH again with hide the SEARCH options.

What does the JOB SEARCH keyword field search on?
Partial matches of Job Title, Employer, Contact and Job ID.

Why can't I see every job?
Most likely you have search settings set.
To reset the SEARCH, press the CLEAR button.
This will bring up every job.

What does the "include if not set" field do?

Ticking this will include fields that match your search as well as those that have these fields empty. This is in case you had not yet around to entering data.

What is the District field?

District field groups suburbs in Australia to areas.
The District field is mapped from the Suburb and Postcode fields.

What is the City Area?

The city area connects to the My Site location field.
This is for Users that what to advertise the area their job is in on their website or within job alerts. It is generic area that can be used outside of Australia.

What are "In Progress" jobs?

These are any job that is not yet Placed, Closed or deleted.
It includes every other status, such as Active, on Hold, Pending Terms, Draft, Lead and Reach.

How are jobs sorted?

When you first login, your jobs are sorted by Job Status (Active, On-hold, Draft, Pending terms, reach, Lead) then by Priority then by Rating (if you use JOQ).
This ensures that your most important jobs are at the top of your list.

You can sort by any column by clicking on the Column name.

Who defines a Job's Priority?

This is set by the user within the Job Details form.
It is up to their discretion.

About the job Source Field

The job Source field becomes visible when an Admin User activates the Show Recruiter Fields or Job Qualifier features.
This field is handy for evaluating job marketing campaigns.
The Source field can be search on within the Job Search options.

How do I edit the Job Source list?
You will need Perform Zone's developers to edit that list for you.

How do I save my job searches?

Whilst logged in, your job searches are stored in the SEARCH folder called Search History.
This folder's history is deleted when you log out

How do I use my jobs details to search for Candidates?

1. Open up your list of Applicants
2. Select the ENTIRE DATABASE stage
3. Within the SEACRH options, press USE JOB DETAILS

This search uses all the words in your job's title as a keyword search within resumes.
It also searches on your jobs location, minimum visa, minimum communication, minimum security clearance and minimum rating of 3, and availability after must start by date.

Use this as a starter for your search.

How do I delete a job?

You can only delete jobs that are have the status of closed, lead, draft or reach.
This is to ensure that you don't lose important data.
To delete:

1. Highlight the job in the Jobs list view
2. Either press ACTION and then select DELETE or double left mouse click on the Job and select DELETE from the pop up that appears.

How do I copy / CLONE a job?

Cloning a job will create a copy of your job.
Your Cloned job will have the word CLONED: appear in its title, allowing you to distinguish the cloned job from the original.
The CLONED job will have no active adverts.

To CLONE a job, either:

Double left mouse click on your job and select CLONE from the pop up or

Select CLONE from the ACTION button list.

How do I edit a Job's details?

You can access the Job Details from within the Jobs list view or from within the Applicants list view.

From within the Jobs list view.
Select the job from with the Jobs list view.

Either double left mouse click on the job then select the OPEN option in the pop up that appears.

Or

Select OPEN from ACTION button.

From within the APPLICANTS list view,
Click the [+] JOB button at the bottom of the screen.

How do I bulk email the contacts for my Jobs?

1. Create the list of jobs that you want to email the contacts of.
2. Select EMAIL ALL from the ACTION button.
3. A pop up will appear that allows you to select the person that you would like to email.

Your bulk email will be reduplicated automatically.

The ADD TO BULK and REMOVE FROM BULK options in ACTION will allow you to filter the email list you have created by running a second search or jobs and either adding or removing the contacts from this list from your initial list.

How do I bulk SMS the contacts for my Jobs?

1. Create the list of jobs that you want to SMS the contacts of.
2. Select SMS ALL from the ACTION button.
3. A pop up will appear that allows you to select the person that you would like to SMS

Your bulk SMS will be reduplicated automatically.

The ADD TO BULK and REMOVE FROM BULK options in ACTION will allow you to filter the SMS list you have created by running a second search or jobs and either adding or removing the contacts from this list from your initial list.

What does the Database Column show?

The database column in the Jobs List shows all the ACTIVE & ON HOLD candidates that you have located within your database and assigned to this job.

What does the Applied Column show?

The Applied column in the Jobs List shows all the ACTIVE applicants that have applied to your job from Advertising and awaiting to your attention.

What does the Shortlisted Column show?

The database column in the Jobs List shows all the ACTIVE & ON HOLD applicants that you have screened and moved from either Database or Applied.
These applicants know that they are being represented for the job they are assigned to.

What does the CV Sent Column show?

The CV Sent column in the Jobs List shows all the ACTIVE & ON HOLD applicants that you have introduced to your client.

What does the Interview Column show?

The Interview column in the Jobs List shows all the ACTIVE & ON HOLD applicants that you have set interviews up for with the Employer.

What does the Job ID represent?

The job ID is your jobs unique identifier.
It can be used as a merge field.
Best practice would be to insert the Job ID merge field into your advert to assist your candidates in identifying which job they are enquiring about when they call in.

I can't click the CREATE button in the New Employer pop up

The New Employer pop up appears when you click NEW next to the Employer field when creating a job. It's a long form that has been created to match Perform Zone's minimum screen resolution requirements.

If you cannot see the CREATE button, your screen resolution is too low.
Best solution is to create your employer before creating your job.

What is the Gun Candidate Alert?

Setting a Gun Candidate Alert will allow you to be alerted of new resumes with keywords that are of interest to you for a job you want to fill.
This will allow you to focus on the best matched candidates first.
This will save you searching your database every day.

Our suggestion is for you to set the alert for each job, and start with the Gun Candidates before looking at any other applicants.
After setting your Gun Candidate Alert, the number of candidates found that match your alert criteria will appear in your jobs Applied column in red with the letter G next to them.

When you view your applications in Applied, they will be sorted with the highest matched Guns at the top. When you view their Resume, your Keywords will appear in green.

Upon setting the Alert, Perform Zone will search your database for resumes that have been added in the last two weeks that contain the keywords you are interested in.

We say the last two weeks as we expect these to be the ones most likely still on the market.

Job Applicants that later apply for your job that match Gun Candidate alerts are flagged in your jobs Applied list with a G in the Rating column.

Any candidate that enters your database (by either applying for a different job, registering to your database or being added by a recruiter) is also checked against your gun candidate alert for your job.

If they match, they are also flagged in your jobs Applied column as a G, their source will show as "database". They won't get the bulk rejection email if you reject them.

How do I set the Gun Candidate Alert?
1. Open up your job's Applications list
2. Click SEARCH and set your Gun Alert criteria
3. Press SAVE AS GUN ALERT

How do I auto-set my Gun alert by default?

You can configure Perform Zone to automatically create a gun alert using your jobs title, visa, communication skills and location fields. This gets created when you make your job ACTIVE for the first time. You can of course edit it and re-save.

1. Logged in as an Admin user, go to SETTINGS and select the LISTS tab
2. Select "Create default gun alert search on new jobs"

How do I remove the Gun Candidate Alert for a job?

1. Open up your job's Applications list
2. Click SEARCH and then CLEAR
3. Press SAVE AS GUN ALERT

How do I remove Guns from my job?

1. Go to your list of database applicants in your job
2. Press ACTION and select REMOVE GUNS

What is a Job's Resourcer?

A Resourcer is responsible for the searching and selecting of candidates.
In a Job it is auto assigned as the creator of the job.
The Resourcer is listed in the My Jobs list.
The Resourcer field is available as merge field.

What is a Job's Account Manager

An Account Manager is responsible for managing the placement of the job.
In a Job it is auto assigned as the creator of the job.
The Account Manager is listed in the My Jobs list.
The Account Manager field is available as merge field.

What is a Job's BDM?

A BDM is responsible for gaining agreement from the Employer to recruit for a job.
In a Job it is auto assigned as the creator of the job.
The BDM is listed in the My Jobs list.
The BDM field is available as merge field.

What is a Job type?

A job type (permanent, casual, temp, part-time, full-time, course) are used when placing
your advertisements online. It is set in the Job Details form, has a merge field, API code and
can be displayed as a column in the jobs list.
The Course job Type allows you to turn your website in to a Course Board, allowing students
to be tracked through their enrolment process in the same way a candidate is tracked
through the recruitment process.
The Job Type is used in the applicants PLACEMENT tab to default the Placement fields.
It is also used to help define a candidate's job alert registration.

What is a job rating?

The Job Rating field is calculated by the Job Qualifier tool.
The rating represents the probability of viably placing the job. The higher the rating, the
more placeable the role.
The probability appears as a star rating on the My Jobs page against each job.
The rating field refines the default sorting of jobs, refining the sort within Job Priority.

A low star rating does not mean the recruiter can't place the role.
It means the recruiter needs to do a lot more work on that role to place it.
The extra work involved reduces the viability of the role.

What is the default sort within the Jobs list

- Status then by,
- Priority,
- Rating (if used) and lastly by
- Date added

About the Job Status Field

About the Active job status
- Allows you to post adverts.
- Active is the default job status when you create a job.

About the Closed job status

A job at closed status means that someone else filled the role or the role has been cancelled.

This does not mean you filled the role.

Changing a job from Active to Closed will remove all advertisements from Job Boards.

All jobs with a job status of "Closed" do not appear in a user's My Jobs default view (as this shows in-progress jobs only).

About the On Hold job status

A job at On Hold status means that employer is not accepting any more applications.

Changing a job from Active to On Hold will remove all advertisements from Job Boards.

All jobs with a job status of "On Hold" appear above the Pending Terms jobs in a user's My Jobs default view.

About the Pending Terms job status

A job at Pending Terms status means that the recruiter has sent the employer contact their terms of business and are now waiting on them agreeing to it.

All jobs with a job status of Pending Terms appear above the Draft jobs in a user's My Jobs default view.

About the Draft job status

A job at Draft status is when an employer contact has enquired about your services but you are waiting on more job details from them before starting the brief or sending your terms of business to them.

All jobs with a job status of Draft appear above the Reach jobs in your My Jobs default view.

About the Reach job status

A Reach is when someone enquires about engaging your services to recruit.

They have not yet confirmed that they want to use them yet.

A job with Reach status appears above the Lead jobs in a user's My Jobs default view.

About the Lead job status

A Lead is where the user has heard that a job might be available but have yet to chase it up to confirm.

All jobs with a status of Lead appear at the bottom of a user's My Jobs default view

What is the Job Created On field?

This is the day that the job was first created, regardless of job status.
Job Created On is available as a column in the Job list.
It is used by the Reports area, under Production.

What is the Jobs Days to fill field?

The days to fill field measures the days from when the job was created to now or the day the job was placed.

About the Total Jobs Field in Job Details.

This is the total number of jobs of the same type that the employer is seeking.
It is defaulted to 1.
Once the total positions have all been placed, all the job board adverts will automatically come down for that job.
You can re-activate a Placed job by increasing the number of Total Jobs to more than the number of placed candidates for that job, and then changing the job status to Active.

What is the Job Reference Field for?

This field appears as a column in your Job List.
You could use it for assigning your employer's job reference (say a tender reference) or your own code.
If you use the word "pool" in this job it becomes a Job Ready job.

About a Job's Requirements field

If you add "Requirements" to a job, these fields are added to your phone screening template.
They are also added to your jobs application page if you are using the Perform Zone My Site.

There are two options for adding Requirements.
Requirements can be entered by Free Text or choosing from a Fixed Library of skills.
The Option is set from within SETTINGS.

How do I add Requirements to a Job?

When using the Free Text Requirements Option

1. Either press the ADD button or double left mouse click in the Requirements table.
2. Complete the fields in the Job Skill pop up that appears

When using the Free Text Requirements Option

1. Select the Skills that you want to add, then press SAVE

What is a Job's Category and Sub-Category?

These AutoMap to SEEK's job board information fields when you first create the job.
They are also handy for reporting purposes.

What are the Salary fields in Job details for?

A job's Salary fields are used to pre-populate the job boards equivalent fields - saving you time later.
In most job boards they are not seen, but used as a search tool for candidates.
It also handy for you to know when screening candidates.
You'll need to set your jobs Country to see the currency fields.

What are the options for Currency?

A particular currency can be set as a default setting for the user.
When your user creates a job, they assign a country. This country will map the currency field to the local currency.

You can also request a customisation to disable the mapping and only show the currencies that you want. This allows you to assign say Euro to a job in America.

What is the "Automatically send all applications to this contact" field for?

This field can only be activated by users with Admin privileges.
Activating this field will send all your applicants resumes to the contact listed.

About the Placement % field

The Placement % field in the Job details tab is the agreed permanent placement fee that the employer has agreed upon.

The field only appears as active for placements that are of Permanent Job Type.
The Placement % field also appears in the job applicants Placement tab for Permanent jobs.
You can set a default Permanent Placement % in the Employer Profile page.

The default Permanent Placement % will populate for all new jobs with that employer.
Overwriting this field in the job details will not affect the default Placement % in the employer profile.

The Placement % field is used as one of the nine qualifiers in the Job Qualifier ratings calculations for permanent placements. The theory is that the higher the placement fee, the more viable the job is to work.

About the Job Qualifier

The Perform Zone job qualifier allows recruiters to accurately determine the probability of them viably placing each role.

This allows you to:

- Determine the best use of your time;
- Improve the accuracy of predicting future income; and
- Determine the quality of their job's marketing campaigns.
- Perform Zone tested the accuracy of the industry's most common job qualifiers to predict placement.

The research showed that nine qualifiers used together gave the most accurate prediction of viably placing the job. These nine are:

1. Anticipated start date
2. Salary on offer
3. Availability of Job description
4. Employer sign off (Job Status)
5. Existing relationship with employer (Class)
6. Fee agreed to
7. Order type
8. Feedback style
9. Candidates available

Once activated, the following fields become mandatory entry fields in the Job Details page:

- Order type
- Source
- Placement %
- Start Date
- Salary
- Description
- Feedback

Your selections, along with existing database knowledge is used to rate the probability of viably placing their job.
The probability appears as a star rating on the My Jobs page against each job.
A low star rating does not mean the recruiter can't place the role.
It means the recruiter needs to do a lot more work on that role to place it.
The extra work involved reduces the viability of the role.

What is the Order Type field for?

The Order Type field appears in the **job details** page as a drop down menu when the **Job Qualifier is activated**.

This is used as one of the nine qualifiers in the **Job Qualifier** ratings calculations.

The theory is that the less competition the recruiter has, the more likely they will place the job.

About the anticipated Start Date qualifier field

Appears in the job details page as a drop down menu when the Job Qualifier is activated.

This is used as one of the nine qualifiers in the Job Qualifier ratings calculations.

The more urgent the start date, the higher the probability that the recruiter will place the role.

This field is not related to the actual Start Date field in the Placement tab.

About the Anticipated Salary qualifier field

Appears in the job details page as a drop down menu when the Job Qualifier is activated.

This is used as one of the nine qualifiers in the Job Qualifier ratings calculations.

The better the salary match to the current market rates, the higher the probability that the recruiter will place the role.

The recruiter uses their knowledge of the market rates to determine the correct drop down selection.

This field is not related to the actual Salary field in the Placement tab

About the job Description qualifier field

Appears in the job details page as a drop down menu when the Job Qualifier is activated.

This is used as one of the nine qualifiers in the Job Qualifier ratings calculations.

The theory is that the more open the employer is to spending time with you to get the job description right, the more likely they will review your applicants and give you feedback.

About the Job Feedback qualifier field

The theory is that the more feedback you receive on submitted candidates, the faster you are able to send better matched candidates, control the good ones you have sent as well as highlight their strengths to the employer.

This field also appears in the employer Profile tab where it is called the "Job Feedback Qualifier". When the selection is saved in the job details page it will update all other jobs with the same employer and the "Job Feedback Qualifier" field in the employer Profile tab.

How does the Job Qualifier determine the number of candidates available?

Suitable candidates for the use of the Perform Zone Job Qualifier calculation is defined as the number of candidates that are subscribed to the jobs Job Alert list.

This is your My Site settings.

Once you have posted the job on My Site, the Job Qualifier calculation is updated.

How do I add an attachment to a job?

Attachments, like job descriptions can be added from within the Job documents table in the Job DETAILS form.
Either press the ATTACH button or double click in the Job documents table.

How do I merge all my job details into a word file?

In job DETAILS form, select "Job" from within the Job Documents table.
This will open up a system template in word that prepopulates with your job details.
You can assign your own custom system template from within the SETTINGS area.

What is the best way to close down a job?

Change the job status field in Job details.
You can delete the job from within the ACTION button, but this deletes all your application history and associated job data.

How do I to delete a job?

Only jobs with status DRAFT or LEAD can be deleted.

1. Open a job
2. Change Job Status to Lead
3. Save
4. Then go back to the jobs list, double left mouse click and the option to delete will be available.

Why can't I delete an Active Job?

This is because applicants may need responding to, adverts may need taking down and so that you can keep a history with the employer of having worked on that job.

How do I restore a deleted job?

No jobs are ever truly deleted.

You can undelete or restore a job by selecting the RESTORE option in the ACTION button within the Jobs list view.
This will open a pop up that shows you who deleted the job and when.
Selecting your job and pressing RESTORE will undelete your job.

How do I bulk email job contacts?

1. Search for the list of Employer Contacts that you'd like to mail to
2. Click the "Create New Bulk Email from Search" button
3. You will be taken to the Marketing section where you can create your Advert.
Click the email editor button in the bottom right hand corner.
4. Create your email content and then press "Save" (in the bottom right hand corner).
5. Close down your email editor by pressing the red X button in the top right hand corner.
This will take you back to the Marketing tab.
6. Press "Send".
7. Choose a date and time to send your email or press "Send now"

ADVERTS

About advertising jobs

Advertising through Perform Zone means that all Job Board and Job Alert applicants will be automatically delivered into your job's Applied stage.
Candidates will also be able to apply via your web site if you have the My Site installed.
This will save you adding these applicants to your database manually.

New Adverts posted or edited to job boards are posted on the hour.
Posting the job to your Website is immediate.

How do I advertise my job?

1. Your job status, located in the job DETAILS form needs to be set to Active.
2. Create your advert by filling out the fields in the Advert Content tab.
   This includes clicking on the edit button in the bottom right hand corner.
3. Click on the Job Board information Tab and select at least one Field & Specialisation set.
   If you want a job alert to be sent out, keep the "send Subscription Job Alerts for this Job" ticked.
4. Click the ADVERTS tab and press POST.
   This will post your job to your website if you have the My Site API, or to Perform Zone's job board. This will be your landing page for social media and job alerts.
5. Select your job boards from the list on Adverts page, and press POST.

I can't post to My Site

You most likely missed a mandatory field in the job Details or Advert tab.
Location field in Adverts only highlights for certain countries. If it does highlight, then it is mandatory.

How do I insert a video into my adverts?

1. You need to post the video online somewhere first (like YouTube). You'll need the videos url. YouTube provides a URL when you click their Share icon.

2. Press the Source button when creating your advert

3. Then paste this line in:
   <iframe allowfullscreen="" frameborder="0" height="315" scrolling="no" src=" https://youtu.be/jVFYOq89spw" width="420"></iframe></p>
   Replace the web address in the line above with your video's url.
4. Press Source again. You will see this appear:
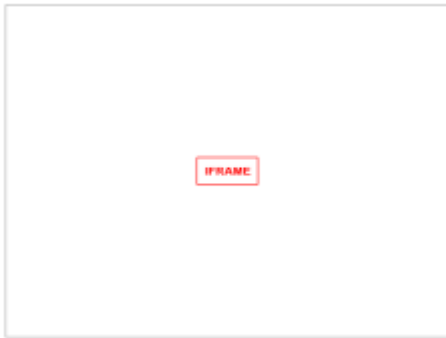
If you right mouse click on this box, a pop up appears, allowing you a quicker way to edit the size and alignment.

Where do applicants from my Adverts end up?

Applicants will appear in your Jobs' Applied stage.

There is a delay in applicants arriving from SEEK

Seek uses a product call SEEK Application Exporter (SAE) that sends applicants to you in batches every 20 minutes.

Directing SEEK applicants to your website

Seek unfortunately does not like the idea of candidates being routed from their site to your website.
Their stance is that you will get less applicants based on SEEK's site being better for mobiles and candidates can use their seek accounts to posts resumes from phones.
What Perform Zone can do now though is send an automatic email to applicants from SEEK asking them to complete their application on your website page; this can include a link to

the job. From our surveys, only ~30% will bother to complete the page.
To set this up, create your email template in TEMPLATES, Section = internal and let us know that you'd like it activated and we'll activate it for you.

How do I take my adverts down?

Either change the job status from Active to something else

Or

1. Click on the Job Boards tab,
2. Select the active campaign and click the REMOVE button on each of the job boards

Or

Take down all adverts and leave the job active by clicking on the Remove All Adverts button.

Indeed Adverts

Indeed scrapes adverts off other websites that you may have advertised on. You'll get emails from Indeed with applicants. These applicants will be automatically added to your candidate database if you have the Email Forwarder add-on.
Indeed leaves your advertisements live for 30 days after the initial scrape - regardless if your advert had expired off other job boards. This means that candidates may be applying for jobs that don't now exist. There is no way that these adverts can come down other than waiting for the advert to expire.

How do I clone my adverts?

1. Double left mouse click on the campaign that you wish to copy from the Job Boards tab within your job.
2. Select CLONE from the pop up that appears
3. Press Go Live on the boards you'd like to repost to

About Adverts status's

The Adverts page lists the status of Advertisements on your job's Job boards.

Live: Your advert can be found on that job board

Processing/Updating: Adverts are loaded on the hour wherein they are upgraded to a Live Status.

Expired: Your Advert has got past the job boards expiry date. See your contract with the job board for that duration.

Error: Error information can be viewed by opening up the Advert and referring the Job Board's Advertisement Status in its Job Board Information tab.

Unconfirmed: Your advert is in draft format. You need to click the Go-Live button for that job board to post the job live.

About the Advert Content field

Advert content is viewed when your Jobseeker clicks on the Advert Teaser/Title on job boards, within your My Site or subscribed job alert email.
Your advert content will be placed within your job boards default Advert Template.
You will need to liaise with the job board directly to set this.
Advert content is limited by some job boards.
The Job Board SEEK for example, limits your advert length to 5000 characters.
Advert content can include hyperlinks, fonts and formatting.
These elements are added by hidden HTML tags.
Job boards count the advert content and HTML when counting the number of characters in your advert.

You can see what the actual character length uploaded to the job board within the Advert editor.
An error will appear in Perform Zone if you attempt to load too many characters in your upload to a job board that has limit.

How to use non-supported Job Boards?

Not all Job Boards are supported by Perform Zone but there are still ways to use these job boards within the Perform Zone software.
In this instance you will manually have to post the advert on the unsupported job board site and then provide links back to your Perform Zone site.

1. Create your job as per normal within the Perform Zone software.
2. Fill out the Advert Content and the Job Board Information under the My Site tab within the job.
3. Make sure the '**Visible on job boards**' drop down menu is showing 'yes' in the Job Board Information tab.
4. Check the job is on your My Site by clicking Adverts on the left hand side under the Jobs tab. There should be a green tick next to your job under the My Site column.
5. **DO NOT** click the 'go live' button for any other job board unless you plan on advertising your job on these job boards also.

Allowing candidates to apply for your job from the unsupported job board.

Now you can add a link in your advert placed on the unsupported job board to the application page on your Perform Zone website.
The format of the link is:

http:// company.performzone.com /app.php?jref=1818

The "http://69.164.195.115" is replaced by your Perform Zone web address you see when you log in to Perform Zone (for example company.performzone.com)
Your job id (jref) is the last four numbers (in the example above this is 1818).
You will need to change this to your Perform Zone job's id.
Candidates who use this link will show their source in Perform Zone as "Website"

Allowing candidates to register into your database from the unsupported job board.
There are two avenues:

1. Ask them in your advert to send you an email.
   Once in your inbox you can use the Outlook Plug-ins and Add-on s
   Candidates who use this method will have their source shown in Perform Zone as the name of the recruiter that registered them in using the outlook plug-in.
2. Direct them to http://69.164.195.105/reg.php, where you replace "http://69.164.195.105" with your Perform Zone URL of the same form (for example company.performzone.com.au).
   Candidates who use this link will show their source in Perform Zone as "Website"
   This page won't allow styling.

How do I to post multiple adverts to the same job board for the one job?

1. Open up your job details page.
2. Click on Job Boards tab
3. Double left mouse click in the Adverts table.
4. Select either:
   Add, which will allow you to create a new advert and posts to job boards from scratch.
   The word "New" will appear in the advert title to show you which advert to edit
   or
   Clone, which will allow you to use the details off the advert that you selected.

About posting job adverts on Facebook

Perform Zone is able to post your jobs to any of your Facebook account's group.
First you must join or create Facebook groups from within your Facebook account.
You can choose which Facebook account and groups you'd like to post to when you post your advert.

Perform Zone will open up your Facebook account.
When your group's friends "like" your advert, it will appear in their Facebook feeds for their friends to see and hopefully like as well.

How do I Activate the CareerOne Uploader?

1. Click on Settings, Click on Job Boards tab

2. Scroll down to the bottom of the left hand screen using the scroll bar in the middle of the screen.
3. Click on CareerOne within the Currently Available Job boards table.
4. Enter your Board Specific Info into the CareerOne Job board Setting page that is displayed on the right hand screen.
5. Contact your CareerOne account manager for these details.
6. Press Save Changes
7. Press Activate Board
8. Re-login to Perform Zone
9. CareerOne icons now appear in your Adverts Page, as well as in the Job Boards Tab when editing a jobs' details.

I get an error saying that I have more than 5000 characters in my advert.

Advert content is limited by some job boards.
The Job Board SEEK for example, limits your advert length to 5000 characters.
Advert content can include hyperlinks, fonts and formatting.
These elements are added by hidden HTML tags.
Job boards count the advert content and HTML when counting the number of characters in your advert.

To count the number of characters in the advert

1. Open the advert editor
2. Select source button on the toolbar
3. Copy the content
4. Paste it in word
5. Check the word count

Removing HTML code from your advert

1. Open the advert content editor for the job
2. Copy the ad
3. Use the paste from word icon in the toolbar
4. Paste in the pop up
5. Save

If I make a change to my advert - how long does it take until it goes on SEEK?
All edits to existing SEEK adverts within Perform Zone will appear live a few minutes after each hour.

How do I find the date I posted a SEEK advert?

1. Go to Jobs > Adverts
2. In Adverts search list:
3. Press Clear,

4. Change "My Jobs" to "All Jobs"
5. Under the Admin section, select the Post Status you would like to see
6. Open the Job you are interested in, locate the Seek Post ID from the Job Boards Tab.

How do I schedule the posting of an advert?

You can schedule advert to be posted to a job board on a particular date and time in the future.

1. Create the advert or clone an already created advert
2. Go to the job boards tab
3. Highlight the advert that you have created/cloned and select the job board that you would like to schedule
4. Alter the time and date for Start posting to job board.
5. Select Go live for the job board you want.
6. The job will go live in the selected Date and Time.

How do I view a report on adverts posted

1. Go to Jobs then click Adverts
2. Select Job Combo Search from the Advanced Search drop down.
3. Select date ranges and Status from the Basic tab
4. Select Job board from the Advertising tab.

About the Adverts list view

The ADVERTS list view is located under the REPORTS tab in the left hand menu.
This shows you the number and status of adverts that you have posted.
The default list is your adverts for jobs that are in Progress.
When adding job boards within Settings, you will also add their status columns to the Adverts list.

Why is my Seek Advert Response report different from what I see in Perform Zone?
The issue is that Seek is ONLY recording candidates that have logged into seek and applied using their seek account.
These candidates may have clicked apply and not completed the application form.
Candidates that have not logged into a seek account will not be shown in Seek's advert response report.

How do I post jobs to non-integrated job boards

Some job boards allow you to specify the application page URL where they will route your applicants to. This means that they can go straight into Perform Zone.

The URL that you use is of the form:
http://your_site.performzone.com/app.php?jref=1105

"your_site" is replaced by your company's name that you see in the URL that appears after you log into Perform Zone.
"1105" is replaced by your job ID in Perform Zone

This URL will open up a standalone application page for your job.

You can track the source of the applicant in Perform Zone by adding using a TADV code (advertiser tag). The form is:
http://your_site.performzone.com.au/app.php?ref=1105&tadv=18

Where 18 is replaced by the tadv code of the job board you're wanting to place the advert on.

Without a TADV coded the applicant will show in their Source Perform Zone as coming from the "web site"

What are tadv codes?

tadv stands for Tag of Advertiser.
It is a code that is added by Perform Zone to your adverts application page.
The tadv code allows Perform Zone to know the source of the applicant when they apply for each job.
The candidate's source is shown in your applicants list when processing candidates.
It also appears in the candidate's profile. The candidates profile shows the original source (they may have applied for many roles).

The tadv code allows you to generate accurate reports on where candidates are applying from. These can be accessed from the reports part of Perform Zone.

For example, your job application page may be:

www.greatagency.com.au/apply/index.php?jref=7026&tadv=31

31 is the tadv code for a Manual Job Alert.

You would use this when sending a job alert to a large number of candidates that you have located from a Resume search.
The Perform Zone reports area would then be able to show you how many candidates came from this source of advertising.
Candidates would be tagged in their profile as Source = "Manual job Alert", and in Process as "Job Alert".

This link:

http://www.greatagency.com.au/apply/index.php?jref=5206&tadv=1&postid=4200

Shows that the candidate has applied from SEEK (tadv=1) for job reference number 5206 and advert number 4200

If you do not have a tadv code, the default source is "website"

Source	tadv code
Website	0
Seek	1
MyCareer	2
CareerOne	3
Other Site	4
Other	5
Job Alert	6
Newspaper	7
JobSearch.gov	9
Database Search	10
Unknown	12
Float Me (ENG MyCareer)	20
Float Me (MIN MyCareer)	21
Float Me (Link or Email)	22
LinkMe	30
Job Alert-manual	31
JobX	32
SupplyChainJobz	33
Recruiter	34
Import	35
Jobs DB	40
Naukri	39
Jobstreet.com	41
Gulf Talent	38
Bayt	37
LinkedIn	42
AME Info	43

Arabian Supply Chain 44

LSCMS   45

Please let us know if you would like us to add your own tadv codes to this list.
Doing so will allow you to generate reports that accurately show how many candidates have applied to your advertisement based on a specific advertiser.
Unfortunately adding a new tadv requires our developers to be involved to code, test and document. This means will be a small cost incurred to add a new tadv code.

About Manual Job Alerts

You can search your database for a list of suitable candidates, assign them to your job and send out an email template that merges the job details and advert into an email job alert.

Things to be aware of…

• Your search results need to be an accurate match or else you risk annoying candidates with job alerts that are not relevant to them.

• You need to provide instructions in your email on how the candidate can unsubscribe.

• You can get reports on the how candidates are applying for jobs, including those coming from your job alerts.

• The Australian Spam ACT allow you to job alert email candidates that have entered your database.

How do I send a Manual Job Alert?

1. Search for a list of candidates from within the Resumes section
2. Check that your search is accurate
3. Click the Search Job button from within ACTION
4. Select your job that you wish to advertise from the list.
5. Click the Apply All button. A pop up will appear once all your adverts have been applied.
6. Open the database stage for your job.
7. Select the Email all candidates within ACTION
8. Create your job alert message, referring to the link for your job advert

Format for the link to the job in the manual job alert:
http://[your performzone link]/apply.php?jref=[jobid]&tadv=31.

If you have use the My Site you will need your website developers to give you the general form of the link.

APPLICANTS

How do I see the applicants for my job?

Within your JOBS list view either;
Double left mouse click on the job that you want to see applicants for and select APPLICATIONS from the pop up that appears.

Or

Press the ACTION button and select APPLICATIONS

Or

To see ACTIVE or On-Hold applicants at a particular stage in the hiring process (database, Applied, shortlisted, CV sent, interviewed), select the cell associated to the job for that stage.

Within Job Details form
Click the [+] Applications button

About APPLICATIONS

This allows you to search through all your applicants.
The keyword field searches through the candidates resume, their name and their email field.

Customize the Columns that you want to show using your Column Selector.

Filter your list of candidates by the status of their application

Filter your list of candidates by the stage of their application.

MOVE TO DATABASE
COMMENT
EMAIL
SMS

EMAIL ALL
SMS ALL
REJECT UNPLACED
REMOVE GUNS
MOVE ALL TO DATABASE
EMAIL REJECTIONS
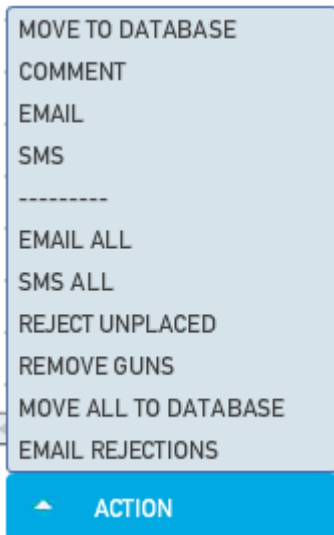
ACTION

Apply actions to your list of applicants (handy when unable to double mouse click on some touchscreens).

If you are in the Entire Database stage, you can see the MOVE TO DATABASE and MOVE ALL TO DATABASE options. This allows you to assign pools of candidates in your database to your job. Once they are in the DATABASE stage you can send emails that refer to the job details using merge fields. Once in the DATABASE stage they will remain there after you've logged out.

MYOB	Office admin	Sales
---	---	---
---	---	---

Quickly view and sort by the number of year's commercial experience your candidates have with your jobs requirements.

[+] JOB DETAIL   [+] CANDIDATE   [+] APPLICATION   [-] RESUME

These options appear after selecting a candidate.
Toggle between different forms on one screen.

Change the status of your candidate's application.
Choose from On Hold, Withdrawn (the candidate is not interested) and Rejected.

STAGE   PENDING

Move your selected candidate to the next stage in their job application.

[+] Resume

RESUME   + DOCUMENTS
Candidate: Jessicha Saarty Armoogum

After selecting a candidate the Resume view appears.
You can use the slider option to expand/reduce the width of the view.

The default view show the candidates interview notes, response to your jobs requirements, summary of their psychometric reports, resume and job description.
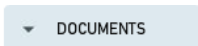
DOCUMENTS

Select which document attached to the Candidates profile you'd like to view.
Download the original view of the Document displayed in the Resume view.

[+] APPLICATION
Form to capture your phone screening notes for the candidates application.

Generate word documents using merge fields for their application.

PLACEMENT Tab

This tab stores all your placement details.

Generate word documents using merge fields from their Placement details.

How can I locate an applicant?

1. Open up you list of applicants
2. Click SEARCH
3. Enter part of the applicants name in the Keyword search field

About the candidate Rating field

You can rate a candidate from 1 to 5 when you are screening a candidate.
5 is the highest rating you can give (as in 5 out of 5).
The best way to use the rating field is to think of it as a measure of the candidate's ability to work hard, or produce.
Basically, the higher the rating, the better you think the candidate works.
Ratings show up against a candidate's name when you are processing their application.
The highest rated candidates appear at the top of your applicants list.
The Rating field appears in your Candidates Profile and can be set to appear in your Application Phone Screening form.

You can search on the candidate ratings in your Candidates list via using Advanced Search.

About the application Status field

Active
Applicants that are still under consideration.

On-hold
You're waiting from something from them or your job is on hold and you've told them.
You might want to use this after you've left a message for them.
The applicants name will appear blue, at be at the bottom of your list.

Rejected
Either you or your job's contact decided that the applicant is not a good match.
When rejected the applicant's name will appear red.

Sent Reject email
Your applicant has been sent a rejection notification.
The applicant's name will also appear red.

Withdrawn
Your applicant has said that they are not interested in your job.

About the application level field

The level field is available as a column in the applications list view and in the Phone Screen form with the Application profile.

The level allows you to compare applicants to each other.
1 = low match, 2. Borderline match 3 = Perfect match.

About the application Location field

The location column show's your applicants address as Country code: State: Suburb

About the application Source field

The application source field shows you how the candidate found your job.
If you applied then from your Database the source = database.
The tadv code determines the Source.

About the application Added field

This is the time and day that the candidate was applied to the job

About the application Relief field

Custom field used to show that the Candidate is open to Relief type jobs.

About the application Ref field

A yes or blank field that shows if a reference check is on the applicants file.

About the application Dominance, Influence, and Compliance fields

DISC behavioural profile raw scores

About the Application Buy and Sell fields

Contract and Casual Employee buy and sell fields available in the PLACEMENT form within [+] APPLICATION tab.

How are Applicants sorted in the Applicants List?

1. Job Ready status (green then yellow then red then none)
2. Level
3. Gun-ness
4. Rating
5. Name

About Manual Job Alerts

A Manual Job Alert is an email that you send to candidates that you have located in your database that alerts them to your job.
Candidates can click on a link in the email and apply online to your job.

How do I send a manual Job alert email?

1. Search for a list of candidates from within the Resumes section
2. Click the Search Job option located within the ACTION button
   a. Select your job that you wish to advertise from the list.
3. Click the Apply all button.
   This creates a job application in the database stage for each of the Candidates you have located.
4. Open the Database stage within your Applications list for your job.
5. Select the EMAIL ALL option from within the ACTION button

6. Create your job alert message, referring to the link for your job advert.

The format for the link to the job in the manual job alert:
http://[your performzone link]/apply.php?jref=[jobid]&tadv=31.

If you have are using the My Site, you will need your developers to provide you with the format of the format.

How do I bulk email my Applicants?

Either use the EMAIL ALL option in the ACTION button

Or

Multi-select applicant by holding the Shift or CRTL button as select applicants, then use the EMAIL option in the ACTION button.

Either of these will open up the Marketing area.
Press EDIT in the bottom left hand corner to open up the email editor.

Create and SAVE your edited message.

Press CLOSE.

Either schedule a date and time and press OK in the pop up that appears, or just press OK to send now.

How do I bulk SMS my Applicants?

Either use the SMS ALL option in the ACTION button

Or

Multi-select applicant by holding the Shift or CRTL button as select applicants, then use the SMS option in the ACTION button.

Either of these will open up the Marketing area.
Press EDIT in the bottom left hand corner to open up the email editor.

Create and SAVE your edited message.

Press CLOSE.

Either schedule a date and time and then press OK in the pop up that appears, or just press OK to send now.

How do I reject all the unsuccessful applicants?

In your Applicants list view, select REJECT UNPLACED from within the ACTION button.

Or

Change the job status from Active to something else.
A pop up will appear with the option to reject all unplaced.

How do I remove all the Gun Applicants found within the database?

In your Applicants list view, select REMOVE GUNS from within the ACTION button.

How do I apply in bulk candidates from one job to another?

1. Multi select the applicants from within your jobs application list.
2. Press APPLY SELECTED from within the ACTION button.
3. Select the job that you want to apply them to
4. Press SELECT JOB

How do I put an Applicant on hold?

Select the Applicant or Applicants and press the orange "pause" button in the bottom left hand corner.

You can un-hold them by selecting them and pressing the green tick button that appears in place of the on-hold button.

How do I withdraw an Application?

Select the Applicant and press then grey "Halt" button in the bottom left hand corner.

You can un-withdraw them by selecting them and pressing the green tick button that appears in place of the withdraw button.

How do I reject a candidate without sending them a rejection email?

Double left mouse click the candidate from your list of job applicants.
Select "REJECT VERBALLY" from the pop up that appears.

How do I send rejection emails out?

Rejection or "regrets" emails can be sent from jobs list, from within your applicants list or when you change a jobs status from ACTIVE.
All methods will open up the templates area with your Rejection Email template pre-set.

Sending bulk rejection letters from the jobs list

You can send Rejection emails out to every candidate that you have rejected for ALL the jobs shown in your Jobs list.

A button "SEND ALL REJECTIONS" will display next to the ACTION button if there are rejected candidates awaiting rejection emails for the jobs in your list.

Sending bulk rejection emails from within the Applicants list

Click "SEND REJECTIONS" from within the ACTION tab.
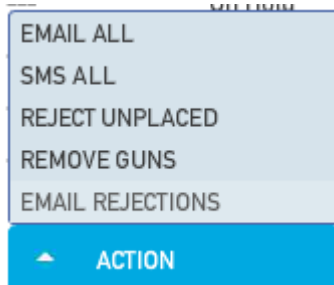
Change the job status from Active

A pop up will appear with the option to reject all unplaced.
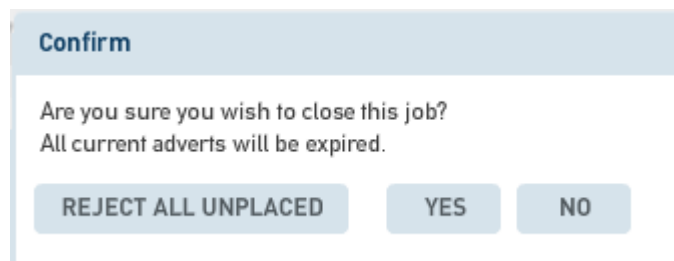
How do I send a specific candidate and tailored rejection email?

1. Double left mouse click on your candidate in your job's Applicants list.
2. Select "EMAIL REJECTION" from the pop up that appeared.
3. The email editor will open, edit and send your email.

What's the best way to send a different email to applicants in shortlisted, CV sent and interviewed stages?

1. Show all Active and On-hold applications.
2. Use the multi-select option and press email in ACTION.

How do I send a bulk rejection email to all candidates in my job's "Database" stage?

1. Go to the database stage and reject your candidates.
2. Press the "Email all" located within the ACTION list.
3. Send your email as normal.

Note, this is best done after placing the job or closing it.
This is because sending emails this way won't change the candidates status to Rej-email sent, so you won't know if a new one popped in

What is the Standard Rejection Email system template?

This template is auto-populated when you click the "send rejection email" button.
Before sending the rejection email, you are displayed the template to ensure that you are happy with the message being sent.

Why can't I send rejection emails to the candidates in my Job's database stage?

All candidates that you apply against a job from the database are put into the "Database column" for the job. The "Email all rejected candidates against this job" button does not work in the database column. That button in the database column will give a draft email with zero recipients.
It is designed in this way because the candidates in the database column never applied for the job from the website or a job board. The recruiter has manually applied the candidate against the job and hence a rejection letter need not be sent to the candidate.

When a candidate applies for a job from a job board or your website they will go the Applied column of the job and the "Email all rejected candidates against this job" will work here because those candidates have applied to the job. Once the email is sent these candidates will be marked as "reject email sent".

If you want to email all the candidates in the database column you can use the "Email all candidates in this job" button. This will create a draft email with all the candidates in the database column. You can insert your appropriate template and send the email.

How do I automate merging my interview notes with a resume?

Automatically merge your interview notes (Summary Template) into your applicants resume.

1. Select your Applicant from within your list of job applicants
2. Activate the [+] APPLICATION form and enter your interview notes into the PHONE SCREEN tab
3. Download your applicants resume and make your edits (such as removing contact details).
   If you have a PDF resume, you might like to use http://www.pdfescape.com to make the edits.
4. Upload the applicants edited resume by selecting the EDITED RESUME button.
   This activates the APPLICATION PDF download button.
5. Press APPLICATION PDF to generate and preview your merged document
6. Press EMAIL CONTACT to open up the email editor with your merged application attached.

About Application stages

In list of job applicants there are 5 possible stages for an applicant:

- Database: you've found them in your database and assigned them to your job.
- Applied: Applicant is yet to be assessed.
- Shortlisted: Internally interviewed but not yet sent to the employer or Line Manager.
- CV sent: CV sent to the employer or line manager.
- Interview: the employer / line manager has an interview set for this applicant
- Placed: Applicant has accepted a letter of offer.

How do I process an Applicant through a job?

1. Select the applicant
2. Select the stage that you want to move them to from within the MOVE TO options list in the bottom left hand corner.

Why can't I move candidates from the Database stage to Applied?

The Applied Column is for Candidates who come from Advertising. (From job boards like SEEK, My Career etc. or your Website).
The Database Column is for candidates in the Database.

If Candidates from Applied Column are allowed to move to the Database Column it means we will be mixing up both and this can lead to candidates who never applied for the job (from the database) receiving rejection letters.

Why can't I remove applicants from a job?

You can only remove candidates that you've assigned to your jobs database stage.
To do this, highlight the candidate in the DATABASE stage and press REMOVE from the ACTION options.

Applicants (those who have applied to your job or you've at least shortlisted them) need to have their application recorded against the job.
You can Reject or Withdraw these applicants instead.

How to I view an Applicants attachments?

Either open the [+] Candidates tab and double left mouse click on the attachment from within the Attachments list in the DETAILS tab, and press OPEN,

Or

Open the [+] Resume tab, select your attachment from the DOCUMENTS drop down and press the download button next to it.

How to do I send interview details in an email?

Create a Candidate template, here's an example:

Hello [[firstname]]
As we discussed, following are your interview details with [[clientname]] for the position of [[jobtitle]]

On:
Located at: {clientstreet} {clientsuburb}
To See: {contactname}

Prior to the interview, please review their website at: {webpage}

Email the Candidate from within the Application list, you'll have to enter the interview time and date and press Send.

How do I send an interview calendar reminder?

You can set an automatic calendar reminder form to appear when you move a applicant to Interviewing stage. This pop up allows you to insert and interview template with your interview details and choose a time. You can send the reminder to both your applicant and job contact.

1. Select your applicant and press MOVE TO > INTERVIEWING
2. Add the Due date within the Interview Confirmation pop up
3. Select the appropriate Template if not a Face to Face interview

4. Press Send.

This sends an interview calendar reminder to your Applicant and the Contact assigned to your Job.
The Contacts reminder has your application PDF and reference checks attached as default.

How do I turn on / off the interview dialog pop up?
1. After logging in as an Admin user, go to SETTINGS > LISTS
2. Tick / untick "Automatically show interview dialog in screening"

How do I edit my interviewing Templates?

You'll need to be logged in as an admin user

1. Go to SETTINGS > TEMPLATES in the left hand menu
2. Select the Interviews Category
3. Locate and highlight your template or double left mouse click in the Templates list and press Add to create a new template.
4. Select the Editor icon in the bottom left hand corner

About the [+] APPLICATION tab

The Application tab contains all the information associated to a Candidates application for a job.

About the Interview Notes field

This field displays at the top your [+] Application, [+] Candidate and Candidate profile pages.

Best practice would be use this field to store notes on your candidate that you don't want to go into your Application Coversheets and are important for your team to second they open up the candidate.

About the Application Notes for Employer field

This field appears only in a candidates [+] Application page.

Best practice is to use this field as a merge field in your candidates Application Summary Template.

About the Candidate's Communication Skills field

Your Candidates Communication field is a searchable drop down that can be shown in your [+] Application, [+] Candidate and Candidate profile pages.

It can be used as a merge field within your Application Summary Template.
The results can be displayed within a column in your jobs applications lists.

About the Salary Sought field

This field appears within the [+] Application tab.
Each Application has its own separate Salary Sought field.
It is used to record the salary that the candidate wants for a particular job.

About the Applicants Availability field

This is a free text field that appear within the [+] Application field.

You can use to record how much notice the candidate needs to give their current employer or when they can start.
It can be used as a merge field within your Application Summary Template.

About the Applicants Requirements Match field

These fields are set within your jobs details form.

They appear as heading within the [+] Application Screen form.
You can enter how your applicant matches the requirements.
Best practice would have this field as:

- a merge field within your Application Summary Template.
- Within your website's job application page (see My Site)

Data stored in this field is accessible within your candidates SKILLS tab.
It is searchable within your candidates and resumes searches.

About the Candidate's Rating field

This field is a searchable field found within the [+] Application, [+] Candidate and Candidate profile pages.

It is used to rate a candidate based on their ethics and character or how good they are at producing. You might want to select "Avoid" for candidates that don't show up for interviews or not up to your company's standards.

Applicants are sorted within your applications list by the rating field.

About the Applicants Level field

This field is a field found within the [+] Application pages.

The field is used to rank applicants within a job.
You can rank them 1 to 3, where 3 is the best.
The results can be displayed within a column in your jobs applications lists.
Applicants are sorted within your applications list by the level field, then by their rating, then by the gun alert, then by their first name.

About the Summary Template

The Summary Template is a word file that contains your interview notes that you'd like to attach to the front of your applicants resume, and send to your jobs contact.

You can edit this template within the Templates folder under SETTINGS and within the Templates tab in SETTINGS

About the Reference Check Template

The Reference Template is a word file that you can store as a word template for adding your Reference check notes.

You can edit this template within the Marketing>Templates and Settings>Templates area.

About the Edited Resume

The edited resume is a copy of the candidates resume that you are going to attach to your candidates application template and send to your client.

By edited we mean that you have edited out the candidate's contact details, and perhaps tidied up the resume and removed referees.

How do I upload the Edited Resume?

Press the EDITED RESUME button within the [+] Application > Screen form

How do I upload a reference check?

Press the REFERENCE CHECKS button within the [+] Application > Screen form

How do I create an application?

You can join your interview notes with your applicants resume with one click.

1. Save your screening notes into the Screening from within the [+] Application tab. Your interview notes are going to merge into your Summary Template.
2. Download the applicants resume prepare it by making any edits, such as removing contact details. Upload the Edited resume back into the Screening Page (via the EDITED RESUME BUTTON).
3. Press the APPLICATION PDF button.

This merges your Summary template with the Edited Resume and creates a pdf file. Pressing the APPLICATION PDF button opens up the pdf file for your review.

It saves a copy to the Candidates profile page attachments.

The next step is to press the EMAIL JOB CONTACT button. This opens up the email editor with the emails subject prepopulated with the job title and candidate name and the application pdf file attached.

How do I upload a custom application?

A custom application is an application that you have created without using the APPLICATION PDF button. You may want to join your SUMMARY template and edited resume outside of Perform Zone.

About the Email Job Contact Button

This button opens up the email editor with the Application and reference checks attached, with the To field of the jobs contact and the email subject line populated with the jobs title and applicants name.

How do I edit the Application Summary Template?

1. Click the Templates folder under Settings in the left hand menu.
2. Select Section = Internal, Category = System Templates
3. Select the template called "Full Application Summary"
4. Edit the template using the available application template merge fields
5. Set the template as the default template for Application Summaries.

NB: We can edit the template for you.
We will need you to send us a word copy of your intended template.
The cost for this is at the standard development costs as outline in your contract.

How do I edit PDF resumes?

Merge your PDF coversheet with their resume and white out their contact details

1. Upload your Application PDF or Resume into http://www.pdfescape.com/open/
2. Use the Insert > White out function to white out the candidate's contact details

3. Press CUSTOM APPLICATION button to attach your edited Application PDF

How can I find out how far an applicant lives from my job?

1.   Select your applicant from within the Applicants list against your job.

2.   Open up the [+] CANDIDATES form.

3.   Press the location icon next to the candidate's street address

If the job and the applicant have data in the address fields, google maps will open up showing you the route and time taken for the applicant to travel to your job.

About the Placement Tab

The Placement tab is where you store the details related to the agreed rates for Applicants. The details can be used in your templates and passed to timesheetsonline.com.au

Permanent placements

- Start Date: Commencement of Employment.
- Guaranteed End Date: This relates to your agencies guarantee/warranty period offered to the employer for this candidate.
- Include salary package invoice tick box: This is a flag to your Finance Manager to include the Candidates salary in the invoice to the employer.
  Some employers asks not to show this in their invoice as it is confidential.
- The Placement Percentage tab: is a percentage fee what the recruiter charges the Employer (for example 15 = 15%).
- The Placement Fee tab is fee that the recruiter invoices the employer for.
  The default figure is the Agreed Salary x Placement Percentage.
  The Recruiter can override the Placement Percentage fee formula at any time.
- Employer Terms: determines whether an Employer pays on a weekly, fortnightly or end of month basis.
- Job Location: Indicates which country and state the candidate is in.
- Invoice contact Details: allows invoices to be sent to the appropriate party.
- Editing contact details will automatically update the Employer Contacts profile.

Selecting Contract, Part Time, Temporary or Casual displays a different set of options from the permanent placement.

- On Employer books: means that the Employer will pay the contractor directly.
- On our books: means that the Agency will pay the Contractor.
- Actual Agreed Buy Rate: means how much the Recruiter will pay the Contractor.
- Actual Sell Rate: means how much the Recruiter invoices the Employer for services of the contractor.
- Payment Interval: Hourly, Daily or Salary.

- Payment Frequency: means how often payment is made to the Contractor.
- Job Location: Depending on which State the Job is located will determine how much Work Cover is paid.
- Contractors Company Name: means that the Contractor may wish to work under their own company structure instead of being paid directly.
- Contractors ACN: Under the Corporations Act 2001, every company in Australia has been issued with a unique, nine-digit number, an Australian Company Number (ACN), which must be shown on a range of documents.
- Timesheet Approver: This is the person that signs off on the contractors time sheets
- Send to TimesheetsOnline.com.au : All the contract fields are sent online to manage the Timesheets process.

How do I edit the Invoice template?

Perform Zone has a system template for Invoice Details which you can edit. To do this, first create a copy of the default template, make your changes and make this your new default Invoice template.

1. Go to the Templates folder under Settings in the left hand menu
2. Select the Internal Section and System Template category.
3. Locate the Invoice template, edit this template and press SAVE.

How do I create the invoice details for a job?

1. Within the placed candidates [+] Application tab, select the PLACEMENT form.
2. Select INVOICE from the Documents Templates list.

How do I create employment contracts?

Perform Zone has a contract template for the Contractor and one for your Client for their services. You can edit the contracts by:

1. Going to the Templates folder under Settings in the left hand menu
2. Select the Internal Section and System Template category.
3. Locate the contract template, edit this template and press SAVE.

Can I use multiple contract versions?

Yes. Create a new template under Internal > System Template category.
To assign them to the CONTRACT TO CANDIDATE and CONTRACT TO EMPLOYER links;

1. Go to settings
2. Locate and highlight the Contract to Candidate or Contract to Employer link.
3. Locate and highlight your new template by using the drop downs under the Select New Template to Use section.

4. Press Set Template as Default.

About Timesheets Online

TimesheetsOnline.com.au is an industry pioneer in web-based time management software. They provide small, medium and large businesses with easy-to-use, web-based, time management software allowing them to accurately tracking employee time, reducing paperwork errors, and automatically prepare payroll transmittals.

To know more about the features of timesheets online please go to http://www.timesheetsonline.com.au/features.php

To activate the Timesheets Online button you need to setup your account details in Settings first.

About the [+] Resumes tab

This tab opens up with the Summary Document view when you first select an Applicant. It is a toggle button which allows to hide the view.
You can preview the Applicants other attachments using the DOCUMENTS button.
You can download the original version by pressing the download arrow next to the DOCUMENTS button.

About the Summary Document view

The Summary Document shows you:

- The Applicants response/users notes on their match to the job requirements,
- The Applicants latest resume
- The Applicants DISC scores
- The job details

CANDIDATES

About the CANDIDATES List view

The CANDIDATES list is located under the CANDIDATES folder in the left hand menu.
The default list shows ALL CANDIDATES sorted by the most recently added.

About Candidate SEARCH

Keyword Search
This search allows you to search on parts of the candidate's name, primary email, phone and ID number.

Searching by Candidate Stakeholder
You can assign a user as a stakeholder to a Candidate.
This allows you to search on your "favourite" Candidates that you'd like to keep a relationship going with. The default search is to show All Candidates regardless of stakeholder. The drop down directly under keyword allows you to search by stakeholder.

Advanced Search – Security Clearance
This lists Australian Security clearances. If not part of your business model, you can turn it off (ask Perform Zone support)

Advanced Search – Rating
Allows you to search on any single rating or minimum rating (say average).

Advanced Search – Availability
Select from the Availability drop down the rule that you after (Available before, available after, unavailable before) then chose a date from the date field below.
Choose days that that the candidates are available in a week by selecting the tick boxes.

Advanced Search – Archived
Archived candidates are those that you chose not to want to appear in your resume and candidate searches by default. Change "No Archived" to other options such as "include archived" and "archived only".

Advanced Search – Newsletter
You can opt candidates into your own newsletter campaign.
With the career centre add-on you can allow candidates to update their own subscriptions through your website. This search allows you to send only to those that are opted n to your newsletter.

Advanced Search – Source
Candidates are tagged with a source code from a list of commonly sourced locations. If they arrive from one not listed, they are defaulted as "website".

You can use this tool in combination with date added to get specific dates on job board activity. You could also use the REPORTS section.

Advanced Search - Date Added
This is the date they were first added into your database (not when they last applied).

How can I search on what type of job types (contract, permanent etc.) that candidates are looking for?

You can search their job type using the candidate search fields under "Seeking".
This searches form within their job alert preferences listed in the candidates Marketing tab.

When Candidates first apply for a role they are assigned a job alert subscription.
This job alert relates to the candidates:

- Industry sector
- Technical Skill
- Location &
- Job type

You can also add & edit these from the candidates marketing tab.
Your candidate can also edit these if you have the My Site plugin installed on your website.

About the Candidate's Stakeholder field

Candidates can be assigned a User, called Candidate Stakeholder.
Candidates can be searched on by their assigned Stakeholder.

About the Candidate's rating field

You can assign rating to Candidates that defines their overall quality as a Candidate.
Options are:

No rating
1 Avoid
2 Below Average
3 Average
4 Above Average
5 Exceptional

These can be searched on with the CANDIDATES Advanced SEARCH options

Ratings can be hidden or shown within the Phone Screen and Candidate's details form.

How do I set my default search settings to my location?

1. Login as an Admin user
2. Click SETTINGS, select the User, scroll down to the User Settings area
3. Select from the Default Region, Country, and/or even State drop downs
4. Make your selection and press SAVE

Re-login to see your changes.

How do I add a Candidate to my database?

Candidates can be added in a number of ways;

- Manually added,
  in your CANDIDATES list view, select NEW from the ACTION button or by double left mouse clicking within the list.
- CSV imports.
  (see the section on importing CSV files)
- Resume imports
  (See the section on importing Zipped resumes)
- From job boards when they apply to a job
- From your website's registration or job application pages
- From your email add-ons

How do I open a candidate's profile?

1. Double left mouse click on your candidate's name.

2. Click "OPEN" from the pop-up that appears.

3. Use the scroll bar in the middle of the screen and the tabs on the top right to review the candidates details.

About duplicate Candidate registrations

When a candidate re-registers via the outlook plugin, job boards or My Site, Perform Zone appends their new data to their existing profile.
This is determined based on matching their email address.

How do I apply a candidate to job?

There are several ways to do this.
All candidates will appear as applicants in your jobs Database stage.

From the list of Candidates

1. Select your candidate
2. Select APPLY from the ACTION button

3. Select the job that you want to apply them to
4. Press SELECT JOB

From within the Candidates profile page
1. Select the Jobs Tab
2. Double left mouse click in the Jobs table and select NEW from the pop up appears.
3. Locate the job that you would like to apply them to
4. Select the job and press SELECT JOB

From with my jobs list of applicants
1. Select the ENTIRE DATABASE stage
2. Use the SEARCH options to locate your candidates(s)
3. Multi-select your candidate(s) by holding down the shift or CTRL button while selecting
4. Press MOVE TO DATABASE from within the ACTION button options.

From within Resume Search
1. Select SEARCH JOB from the ACTION button
2. Locate and select your job
Apply a single candidate from your search by highlighting them in the search results and select APPLY from the ACTION tab.
Apply all your located candidates by pressing APPLY ALL from within the ACTION button options.

Applied candidates become applicants to your selected job and are located in the DATABASE stage for your job.

How do I skill a Candidate?

There are several ways

- From within the CANDIDATE's profile,
  select the SKILLS tab.
- From within the APPLICATION form
  Complete the skills required for the job they have applied for
- The Candidate skills themselves
  Within your job application on your website, or in your websites candidate registration page.

When you add skills you can add comments, expiries, year commercial experience (YCE) and yes/no tags.

When you first start using Perform Zone, you'll be set up with the default skills drop down list to select and create skills with. You can change this default to show a fixed list of skills with tick boxes, allowing you to multi select skills. This means you can add skills faster. See the section on checkbox skills interface for more details.

How do I update a Candidate's availability?

1. Open Candidates Profile page
2. Select date from Available after option

About Subscription Job Alerts

A subscription Job Alert is an automatically generated email that is sent to candidates that have the subscribed to receive job alerts.
It is activated from within your My Site job board information tab.
Candidates subscribe to a job alert by choosing the job's Field, Specialisation, State and Job type they would like to hear about.

When candidates apply via one of your adverts, they are automatically subscribed in to receive job alerts that match you're job's My Site Field and specialisations.
You can edit a candidate's subscription from within the Candidates profile.

The My Site API has options to allow the candidate to subscribe / unsubscribe to other job alerts.
Candidates opted out from Bulk Mailing will not get the subscription job alert email.
The job alert template email is editable from within your Settings > Templates area.

The default job alert that is sent includes all the jobs currently open that match the candidate's subscriptions. The most recent job is advertised on the top of the list.

You can edit the Job Alert template yourself.
We can also set the template up how you would like.
To do so, email us an example of how you'd like the email to appear to: support@performzone.com .

The cost is per hour as per your contract. Simple templates usually take 30 minutes – 1 hour. We will quote prior to starting.

Things to be aware of…

You can customise your website to allow candidates to update their job alert subscriptions themselves.
You can get reports on the how candidates are applying for jobs, including those coming from your job alerts.
The Australian Spam ACT allow you to job alert email candidates that have entered your database.

How do I edit a candidate's job alert subscriptions?

To create a job alert subscription for a candidate

1. Open the Candidates Profile page
2. Click on the Marketing tab in the top right hand corner of the screen.

3. To add new Job alert subscription, double left click anywhere in the box and click ADD.
4. Select the appropriate values for Field, Specialisation, Country, State and Work Type of the client and select OK.

Note: An Automated email will be sent to the candidate whenever a job matching the Job Alert criteria is posted.
A candidate can have any number of job alert subscriptions.

To edit or delete job alert subscription

1. Select the job alert subscription
2. Double click and choose EDIT to edit the subscription and DELETE to delete the subscription.

How does a candidate register for Subscription Job Alerts?

When a candidate applies online to one of your jobs they are automatically subscribed to a job alert subscription.
The job alert subscription details are based on the job they applied for.
The jobs State, Job Type (contract or permanent) and My Site Primary Field and Specialization are used to create the job alert code.

If you have installed the Perform Zone My Site, you have the option of allowing the candidate to manage their own job alert subscriptions.
This can be created by using the My Site API's that Perform Zone provides.

How do I archive a Candidate?

Archiving a candidate removes them from your Resume Combo Search. Archived candidates will still appear in your Keyword Search next to the Green arrows on your Candidates page.

You might use this for a candidate you have placed in a Permanent job that you don't want other staff to poach, or to prevent low quality candidates from coming up in your searches.

The Archived area is where you can locate the candidates you have archived.

To archive a candidate:

1. Open the candidate's profile
2. Tick the Archived Candidate tick box.

How do I delete Candidates?

The following methods allow you to restore the data if you wish to later

How do I delete a single candidate?
1. Go to Candidates, then My Candidates from the left hand menu
2. Select a the candidate that you wish to delete from the My Candidates view
3. Double left mouse click and press Delete.

How do I delete a list of candidates?
This method relies on combining all the candidates into one profile then deleting that profile. Once combined you can't un-combine so tread carefully.

1. Export your candidates to a CSV file that includes only their email address and candidate ID
2. Change all the email addresses in the CSV file to a single email address
3. Import the file using the "Ignore new, update matched" Import method.
4. Open up one of the candidates profiles; press the COMBINE option at the bottom of the page.
5. Once combined (may take a while if you have a big list), delete the single candidate that remains.

How do I remove permanently data from my database?

You can cleanse data so that it is gone forever and not recoverable.
It requires Perform Zone developers being involved and is charged at the developers hourly rate (see your contract).

Permanently deleting candidates
This process assigns the candidates to an obscure country (Namibia) so that Perform Zone's developers can locate the data and delete for you.

1. Export all Candidates using the Export System by Ticking the Candidate ID, First Name, Surname, Email and Country
2. Assign the "Name of file to export" then "Begin Export"
1. Download file and Change "Country" to NA for all Candidates you wish to delete and (save this as a CSV file)
   Please note: NA is the Country code for Namibia. If you source candidates from Namibia, let us know and we will find an alternative.
3. Import Data - UPLOAD CSV and click Prepare
4. Import as "ignore new, update matched" and untick "Country" in Use For Match field
5. Begin Import
6. This will update all the Candidate data (Country = NA for all the Candidates you marked)
7. Once this is done, please ticket a support request to Perform Zone so we can finalize the deletion process

RESUMES

What does the "Show only highest Scored documents" tick box do?

Candidates can load up multiple versions of their resume.
Generally you only want to see the resume that is the highest match to your keyword search. When you run resume search, the "show only highest scored documents" is defaulted to ticked. This means the search returns only one resume – the best matched one.

If you untick this field you will see every resume that matches your search regardless of how many have been uploaded to the candidate's profile.

Boolean Searching of Resumes

The default Resume Search searches within the Regions that you have set in Settings minus the Archived and Deleted candidates.

Perform Zone allows you to create complex searches of words within your candidates documents by using Boolean search commands.

These operators are:

+ - && || ! ( ) { } [ ] ^ " ~ * ? :

The following rules apply to the Keyword box in the Candidates Resume search area.
If this proves too tricky, try the Basic Search option on the same screen.

OR

The OR operator finds a matching document if either of the terms exist in a document.
To search for documents that contain either "receptionist" or "assistant" use the query:

Receptionist OR Assistant

If there is no Boolean operator between two terms, the Perform Zone assumes that you mean OR.

The symbol || can be used in place of the word OR.

AND

The AND operator matches documents where both terms exist anywhere in the text of a single document. The symbol && can be used in place of the word AND.

To search for documents that contain Receptionist and MYOB use the query:

Receptionist AND MYOB

 The symbol && can be used in place of the word AND.

+

The "+" or required operator requires that the term after the "+" symbol exist somewhere in the document.

To search for documents that must contain "jakarta" and may contain "lucene" use the query:

+jakarta lucene

NOT

The NOT operator excludes documents that contain the term after NOT.

To search for documents that contain "jakarta apache" but not "Apache Lucene" use the query:

"jakarta apache" NOT "Apache Lucene"

The symbol ! can be used in place of the word NOT.

The NOT operator cannot be used with just one term.
For example, the following search will return no results:

NOT "jakarta apache"

"-"

The "-" or prohibit operator excludes documents that contain the term after the "-" symbol.
To search for documents that contain "jakarta apache" but not "Apache Lucene" use the query:

"jakarta apache" -"Apache Lucene"

 Phrases ""

If you want to find a document with either the phrases "Analyst Programmer" or "Software Developer", you can enter:

"analyst programmer" or "software developer"

Brackets ()

Brackets or parenthesis can be used to refine your search.
For example, a search for all resumes that contain the word "legal" and either "executive" or "Personal Assistant" could be:

Legal AND (executive OR "personal assistant")

You could drop the OR as it is defaulted it there is a space between words not in quotations

Wildcards "?"

To perform a single character wildcard search use the "?" symbol.
The single character wildcard search looks for terms that match that with the single character replaced.

For example, to search for "text" or "test" you can use the search:

te?t

To perform a multiple character wildcard search use the "*" or "%" symbol.

Multiple character wildcard searches looks for 0 or more characters. For example, to search for test, tests or tester, you can use the search:

test* or test%

You can also use the wildcard searches in the middle of a term.

te*t or te%t

Note: The only wildcard search that works outside of the resume search is %. Also you cannot use a * ? or % symbol as the first character of a search.

Fuzzy Searches

A fuzzy search can operate like a spell checker and spelling-error corrector.
For example, if a user types "Misissippi" a list of hits is returned along with Mississippi.

To do a fuzzy search use the tilde, "~", symbol at the end of a Single word Term.
For example to search for a term similar in spelling to "roam" use the fuzzy search:

roam~

This search will find terms like foam and roams.

You can rate the degree of "fuzzyness" you'd like to search on.
The value is between 0 and 1, with a value closer to 1 only terms with a higher similarity will be matched.
For example:

roam~0.8

The default that is used if the parameter is not given is 0.5.

Words within a specific distance of each other

Perform Zone supports finding words are a within a specific distance away.
To do a proximity search use the tilde, "~", symbol at the end of a Phrase.

For example to search for a "apache" and "jakarta" within 10 words of each other in a document use the search:

"jakarta apache"~10

Note: there is no space between the "~" and the 10

Boosting a Term

Perform Zone provides the relevance level of matching documents based on the terms found.
To boost a term use the caret, "^", symbol with a boost factor (a number) at the end of the term you are searching.
The higher the boost factor, the more relevant the term will be.
Boosting allows you to control the relevance of a document by boosting its term.
For example, if you are searching for jakarta apache and you want the term "jakarta" to be more relevant boost it using the ^ symbol along with the boost factor next to the term.
You would type:

jakarta^4 apache

This will make documents with the term jakarta appear more relevant.
You can also boost Phrase Terms as in the example:

"jakarta apache"^4 "Apache Lucene"

By default, the boost factor is 1. Although the boost factor must be positive, it can be less than 1 (e.g. 0.2)

Default Resume Search

Your Resume Search is defaulted to locate the highest scored resume associated to the candidate you have located.

The default Resume Search searches;

- only on resumes,
- minus the Archived and Deleted candidates.
- and is dependent on your Default location fields in Settings

How do I show only available candidates?

1. Select Advanced from within Resume SEARCH
2. Select Available after date and enter todays date

Why aren't my all resume search keywords highlighted in green in my resume viewer?
The highlighting code only works for "and" searches.
The good news is that your search results are accurate.
If you search within the downloaded document you will find all search words will be in the document

It does not highlight searches such as (fred or john).
It will highlight searches results for (fred and john)

How do I Add candidates from a Resume Search to a Job?

1. Run your candidate search in Resumes
2. Press ACTION and select Search Job
3. Highlight your Job in the Job Search pop up list.
4. Click Select
5. Either Click the Apply All button to apply all candidates to the DATABASE stage for your job or select individual candidates resumes from your search list and click Apply to add them.

How do I import resumes?

Perform Zone Resume Importer allows you to import resume via a Zip file.

Resumes will be scanned for the best match for the candidates contact details and a Candidate Profile created in Perform Zone.
If the candidates is already in Perform Zone (based on an email match) the Resume Importer will add the resume to their existing profile.

1. Compress the folder full of resumes you wish to import into a Zip file.
   Note, there is free software on the internet to save all your email attachments into a folder on your computer. Once saved you can then zip them up.
   For outlook, we have used Outlook Attachment Sniffer successfully to download attachments.
2. Click Candidates from the within the left hand menu.
   Select the sub menu option 'Resumes'.
3. Select IMPORT RESUMES from the ACTION button.
4. Click Upload Resumes from within the Bulk Candidate Resume Import pop up.
   Select and Open your Zip file from within the pop up.
   All resumes in the zip file will appear on a list on the left.
   If the progress window fails to open, close down and reopen the resume import window.
5. Choose either Auto Import All, which runs a parser over every file and automatically adds them to your database
   Or
   Select each single resume, edit the parsed Candidates Details data and press Add Candidate Details.

Because candidates have an infinite way of laying out their resume, no resume parser can be 100% accurate.
Perform Zone will attempt to find the candidates details from the first resume and present them to you.

About the Auto-parser

Phone, email & address automatically extracted from new resumes and added into your candidate's profile.

- Email
- Region, country, state, suburb, post-code, district
- Phone numbers

The auto-parser works on files being uploaded by Job Boards, your My Site, outlook plugins and being added manually into Perform Zone.

If the data already exists in your system, the auto-parser won't replace it.
Our suburb libraries only account for Australia and New Zealand at the moment.

Parsing all my current resumes

1. Login as an user with Admin privileges
2. Search with Candidates>candidates for the list of candidates that you would like to have parsed.
3. Select Bulk Parse resumes from within the ACTION button.

Only the latest resume of the Candidate is parsed.
The parsing may take a while (100,000 profiles = 36 hours) as it is seen as a non-critical task so that it does not slow down your other users.

How is the Score in Resume Search calculated?

The score is based on the frequency of the keyword appearing in the text compared to the total number of words in the document.

How can a CV with one relevant word can have a higher score than a CV with multiple words?
For example,:
"I've done a resume search on AutoCAD selecting (resumes only and show only highest scored document for candidate).
Candidates with AutoCAD on their CV only once are showing a higher score than candidates with AutoCAD on their CVs multiple times?"

The score is based on the frequency of the keyword appearing in the text compared to the total number of words in the document.

The lower scored document is much larger in terms of the total number of words in the document then the higher scored document.

In your example, the 'frequency' of matches within the document is lower because although it has 3 occurrences of the word 'AutoCAD' it is 3 within 1000 words whereas the other one has 1 within around 100 words.

Think of it this way; if you have a page of text where AutoCAD is mentioned once, should this score higher or lower against a book (of 100 pages) of info where AutoCAD is mentioned 3 times?

Generally in search theory the single page is more important than the whole book, as the page would seem to be more relevant to the word then the whole book.

In the example mentioned, the score of the higher is 0.647 and the lower is 0.643 - so there is only a very slight difference in score.

How do I associate candidates to Job Functions in bulk?

1. Ensure that your Job function list is complete.
2. Create a CSV file that includes a column each for Field and Specialisation. You will need either the candidate or ID or email address column as a minimum.
3. Go to Candidates and import your CSV file, assigning your Field and Specialisation columns.

Specialisation import must have field imported to in same csv.
Specialisation must be sub field of 'Field' in the My Site lists in settings.
If you import field and specialisation where the specialisation is not a sub category of the field in that csv line, the specialisation will not import, but the field still will.

My .pdf files are being opened by Word

It is possible that your computer thinks that the pdf file is a word document and tries to open it using word.

Solutions could be:

The file does not have a pdf extension when saved to PZ.
Save the file with a .pdf extension (for example fred.pdf) to your desktop and open.

Your pc is opening all .pdf files using word.
This may be due to adobe crashing.
Re-install adobe acrobat or download the latest updates or, save the pdf file to your desktop, right mouse click on the file and select "open with" and select Adobe.

REVERSE MARKETING

How do I add a list of Employers to a Candidates Reverse Marketing list?

1. Search for a list of Employers that you want to Reverse Market to.
2. Select REVERSE MARKET from the ACTION button options
3. In the Pop Up that appears, locate and select your candidate and press ASSIGN

How do I open the Reverse Market module?

1. After assigning your list of Employers to your candidate, double left mouse click on your candidate's name in your candidates list.
2. Select "REVERSE MARKET" from your pop-up.

How do I see from the Candidates profile which companies I am Reverse marketing them to?

1. Open the Candidates' Profile
2. Click on the Jobs tab

How do I generate a Candidates Reverse Marketing report?

1. Click the "Generate Reverse marketing Report" button
2. Allow your computer report.xls to open the excel file

How do I add a new contact within the Reverse Market Module?

1. Click the Add Contact button within the Reverse Marketing module
2. Complete the pop-up that appears
3. Edit the remaining Contact details in the Reverse Marketing module
4. Inspect to see that all the Candidate profile fields have been passed correctly
5. Select OPEN from the pop-up

How do I end an unsuccessful Reverse marketing Campaign?

1. Click the "End reverse Marketing Campaign" button within the Reverse Marketing module.
2. Select the "Reason for Closing is…" from the drop down in the pop up that appears

How do I record my Reverse Marketing progress?

1. Select one of your Assigned employers from within the Reverse marketing module.
2. Select a Contact.
3. Make your call and record a comment in the Comments Section, pressing the "Add Comment:" to save them.
4. Press one of the following buttons depending on the call outcome:
   - Reject (if the Employer is not interested)
   - On-Hold (if you have left a message)
   - Move to Shortlist (if the Contact is interested and wants to see your candidate's details).
   - Move to CV Sent (once you have sent the Contact your Candidates details)
   - Move to Interviewed (if the Contact wishes to see your candidate)
   - Move to Placed (if you contact wants to trial them)

PLACED

About PLACED Candidates

A candidate becomes a Placed Candidate when you move them to the PLACED stage in a job.

What is an Active Contractor?

In CANDIDATES>PLACED SEARCH there is a tick box "Active Contractors"
It searches for all Casual, temp and Contractors that have a PLACEMENT end date in the future.
If you don't have an end date, the candidate is still considered ACTIVE.

How do I set a placed Contractor's Start and End date?

1. Open the candidates [+] Application against their placed job
2. Click on the PLACEMENT tab
3. Change the start and end dates

How do I save the actual charge out / sell rate of a contractor?

Perform Zone calls the rate that you pay the contractor their "Actual Agreed Buy Rate".
The rate that you bill your client for their services is called "Actual Sell Rate".
Locate these fields by:

1. Open the candidates [+] Application against their placed job
2. Click on the PLACEMENT tab

How do I extend a Contractor?

Set the placement systems templates to the Extension templates

1. Go to Settings>Templates.
   Select Application Summaries from the "Assign Templates for" drop down.
2. Select the Contract to Candidate template.
   Select the Contractor Extension template on the right hand side (located in Internal>system templates), and press Set Template as Default

3. Select the Contract to Client for Candidate template.
   Select the Client Extension template on the right hand side, and press Set template as Default

Update the placement details

1. Open the job the contactor is currently Placed in.
   Select the PLACEMENTS form from within [+] Applications tab
2. Update the placement details (start and end dates as a minimum) and press SAVE.

Generate and send the contractors extension paperwork

1. Press CONTRACT TO CANDIDATE from within the PLACEMENT forms Documents Templates list
2. Save the file as a word file to your internal Contracts folder.
   Use the Reference number contained within the Contract as the file name.
3. Send a copy of this file to the contractor

Generate and send the Clients extension paperwork

1. Press CONTRACT TO EMPLOYER from within the PLACEMENT forms Documents Templates list
2. Save the file as a word file to your internal Contracts folder.
   Use the Reference number contained within the Contract as the file name.
3. Send a copy of this file to the Employer Contact for the job.

How can I find a list of employers that we have placed certain skills at?

1. In the left hand menu, click Candidates then go to the Placed Tab
2. Click SEARCH
3. Expand the Position folder and choose the Specialisation of your job.

EMPLOYERS

How do I add a new Employer?

1. Click on Employers section in the left hand side menu
2. Check to see if the Employer already existing by entering the employers name into the Keyword search box.
3. Either; double left mouse click in the list of employers and select NEW in the pop up, or select NEW from the ACTION button options. The new Employer Details page will open.
4. Enter as much data as you wish and press SAVE when finished.

How do I open up an Employer Profile?

There are several ways

From within the jobs list view
Click the Employers name associated to your job.

From the Employers list
1. Click EMPLOYERS from within the left hand menu.
2. Search for your Employer
3. Select your employer and either
   a. double left mouse click on their name and then press OPEN from the pop up that appears or
   b. Press the ACTION button and select OPEN

From within the CONTACTS profile
Click the "Back to…" button at the top of the Contacts profile.

About the Employer Class field

An employer is assigned their Class by Perform Zone automatically.
Client = have made a placement with the employer before
Customer = have taken a job on but have not filled it.
Prospect = never taken a job on.

The employer Class field is used as one of the nine qualifiers in the Job Qualifier ratings calculations. The theory is that the more placements you have made with the employer, the more likely you will make another.

How do I create branches and head offices?

Employers can be assigned as a head office, branch or subsidiary.
To create a branch:

1. Select **Branch** from the Company Type drop down.
2. Click Search to locate your branches head office.

About the Employer Grading field

Employer grading is used to estimate how much you will bill from this employer in the next 12 months.
It determines how often they will rise to the top of the Employers list.

About the Employer Industry field

The employer Industry field allows you to create reports and lists for marketing.
It can also be used invoices to assist with allocating WorkCover industries.
This field also appears in a Candidates profile.
You can edit the drop down list within Settings > Lists.

About the Employer Stakeholder field

These are the users assign to the employer.
This will allow the Employer to appear in the users My Employers search

How do I see all the jobs I have taken on from an Employer?

1. Open the employer profile
2. Click the Jobs tab on the right hand side.

How do I generate Terms of business for an employer?

The Terms of business is a system template.
To generate your merged word file,

1. Open the Employer profile
2. Click "Terms" listed in the Documents table

CONTACTS

How do I add an Employer Contact?

A contact is associated to an Employer.

1. Open up the employer that you'd like to associate them to.
2. Scroll down to the contacts list and press Add Contact.
   You'll need to add their first name, surname and email address then press SAVE.

How do I search on an Employer Contact

1. In the left hand menu, Select Employer then Contacts
2. In the Keyword box within SEARCH and search on partial match for the email, their name, company or ID .

How do I open up a CONTACTS Profile?

There are several ways

From within the jobs list view
Click the Contact's name associated to your job.

From the CONTACTS list
1. Click EMPLOYERS from within the left hand menu, then CONTACTS
2. Search for your Contacts
3. Select your Contact and either
   a. double left mouse click on their name and then press OPEN from the pop up that appears or
   b. Press the ACTION button and select OPEN

From within the Employer profile
Double left mouse click on the Contacts name and select OPEN from the pop up that appears.

About Float Codes

Floats are used to market prospective candidates to employer contacts.
You can search on these codes and email a candidate summary as a form of marketing.
Some people call this style of marketing floating or reverse marketing.
The Employer Contact must be opted-in to receive emails.

How do I add a Float Code to a Contact?
1. Click on the Marketing tab within a Contacts profile

2. Add a Field and specialisation under the title Job Function
3. Select a Specialisation
4. Click Add
5. Click the red button down the bottom to save

How do I search on Float codes?
1. Expand the Marketing folder within the Contacts SEARCH bar
2. Select the Float Code Field & Specialisation

MARKETING

About opt in / opt out

Opting in allows your candidate or contact to be included in your bulk email marketing.

This includes newsletters, job alerts and other marketing material you may send.

Candidates from within the Applied, Shortlist, CV Sent, Interview or Placed lists will still receive bulk emails regardless of their opt in status.
This ensures that they get updates on the application.

You can search to see which contacts are opted in by using the Opted in drop down in Contacts search.
For candidates, you will need to extract them to a CSV file, and sort by the Opt In status column.

You can make a bulk change to your candidates and contacts opt in status by exporting your search results list to a csv file, make the changes to opt in status and re-import the updated file.

You can update a candidate's or contact's subscriptions by either opening up their profile, or by using the Advanced Outlook plugin.

How can I unsubscribe a candidate or contact?

You can unsubscribe people from your marketing emails (such as newsletters and job alerts) by:

- Un-selecting the opt-in option in their profile
- Press the "unsubscribe" button in the advanced outlook plugin
- Importing a contact or candidate CSV file in with a column called "Opt in" containing "No"
- Implementing a unsubscribe page using the My Site and inserting an "unsubscribe" link to it in your emails.

What is the best way to opt out bounced emails?

The best way is to extract all your bounced email addresses into a .CSV file and opt them out in out upload by importing the file into Perform Zone.

1. Use a rule to move all your bounced emails into a folder in your email software (outlook, mac mail etc.)
   An example rule could be

Move all emails with subject line containing "undeliverable" to the "Bounced" folder
"Bounced" folder is one that you'll need to create under your email inbox folder.

2. Extract all the email address for emails in that folder to a CSV file.
   There are free "email address extractor" programs available on the internet to do this. Recent versions of Outlook have tools built in to do this also.
3. Create an additional column in the CSV file with header labelled "Opted in".
   Next to each email address enter "No" in the opted in column.

	A	B
1	Email	Opted in
2	Fred@gmail.com	No

4. Select Candidates from under the CANDIDATES folder in the left hand menu within Perform Zone.
5. Press IMPORT found under the ACTION button.
   Upload your CSV file (MUST be a .CSV not an .xls file).
   Ensure that the tick box next to email is ticked in Use for Match column.
   Assign the Opted in Column to Opt In.
   Chose the Import Method "Ignore new, update matched".

Import Column	Example Data	Database Field	Use For Match
Email	Jeremy.Stork@stefanini.com	Email	✔
Opt In	no	Opt In	

Column: Candidate ID

Candidate ID ▼

SAVE ASSIGNMENTS

Import Method

Ignore new, update matched ▼

   Press BEGIN IMPORT
6. Select Contacts from under the EMPLOYERS folder in the left hand menu within Perform Zone.
7. Repeat step 5 above.

How do I Stop a bulk email from being sent after it has started?

1. Double left mouse click on your email being sent out from within the MARKETING>Marketing SENT tab
2. Select "STOP AND MOVE TO DRAFT"
3. Select your email from the DRAFT tab, EDIT and SAVE your changes
4. Press SEND

This will send your edited version to your remaining recipients.

How do I filter my bulk email list?

You can remove people in bulk from your mail out.
You can also combine lists and send one big campaign instead of multiple smaller ones.

1. Generate your first list.

2. Press email all
3. Generate your second list that you want to either add of remove from your first list.
4. In the ACTION button options, choose either ADD TO BULK or REMOVE FROM BULK.

What do some of my emails show as failed to send?

This is because Perform Zone filters out emails that are not in the correct syntax before sending. As a general rule, illegitimate addresses are those that you do not think are real or do not recognize.

Invalid email addresses:

- Abc.example.com (character @ is missing)
- A@b@c@example.com (only one @ is allowed outside quotation marks)
- "0;;<>[\]@example.com (none of the characters before the @ in this example is allowed outside quotation marks)
- this\is\"really\"not\\allowed@example.com (spaces, quotes and slashes may only exist when within quoted strings and preceded by a slash)

How do I delete Contacts?

The following methods allow you to restore the data if you wish to later

How do I delete a single contact?
1. Locate your Contact
2. Double left mouse click on their name and press DELETE

How do I delete a list of Contacts?
This method relies on combining all the Contacts you want to delete into one profile then deleting that profile. Once combined you can't un-combine so tread carefully.

1. Export your list of Contacts to be deleted into a CSV file that includes only their Email address and Contact ID
2. Change all the email addresses in the CSV file to a single email address
3. Import the file using the "Ignore new, update matched" Import method.
4. Open up one of the Contacts profiles; press the COMBINE option at the bottom of the page.
5. Once combined (may take a while if you have a big list), delete the single Contact that remains.

TEMPLATES

How do I add a new template?

You need to be logged in as Admin user

1. Go to Settings>templates in the left hand menu
2. Choose the Category where you'd like to save the template
3. Double left mouse click in the list of Template, press NEW
4. After creating your content, give the Template a Title and press UPDATE

How do I add a new marketing list?

1. Click on Settings in the left hand menu
2. Select the Lists tab
3. Select Template Categories List from the Configurable Options List
4. On the right hand side of your screen, select the Template Section you would like to add the extra "subfolder" to. Subfolders are called "template categories" in Perform Zone.
5. In the bottom left hand corner, enter your new category name in the field left of the Add button.
6. Press the Add button.
7. Press Save Changes.

When editing a Template, sometimes the first line of the email that the candidate receives seems to be a few spaces down the page?

You have a line break hidden at the start of the Template.

1. Go to the Templates folder under SETTINGS in the left hand menu
2. Open up your template
3. Select "Source"
4. Delete all the html code (anything in <>s) before the text you want to be at the start of your email.

What are system templates?

System templates are word or email templates assigned to certain functions throughout Perform Zone. They include:

System templates are word or email templates assigned to certain functions throughout Perform Zone. They include:

Signatures

- Email Signatures

Application Summaries

- Application confirmation emails (when a candidate's application for a job is received)
- Auto Send Application (if your auto forwarding all job applicants to your job contact)
- Application Summary (coversheets with your screening notes)
- Reference Check (Generates a word file from the Candidates profile)
- Email interview details (when moving a candidate to Interview stage)
- Invoice Details (Summaries placement details for billing, handy for Sales Manager and finance dept)
- Contracts (to candidate and employer)
- Standard rejection letters (activated when you press "Send rejections"

Job Summaries

- VIS Summary (Vacancy Information Sheet, merges all your job details fields into a word document)

Client Emails

- Standard Terms of business (generated as a word file when pressing "Terms" in employer profile)

Marketing Emails

- Job Alert email (sent when you select "send subscription job alert" within My Site adverts tab.

How do I edit my system templates?

1. Click Settings in the left hand menu.
2. Click the TEMPLATES tab
3. Locate and select your System template using the "Assign Templates for" drop down
4. Press "Edit This Template" on the right hand side of the screen
5. In the email editor that appears, Make your changes and press save

NB: We can edit the template for you.
We will need you to send us a word copy of your intended template.
The cost for this is at the standard development costs as outline in your contract.

REPORTS

How do I create a report on applications received?

1. Go to Reports
2. Select Category "Candidates"
3. Type "New candidates by source"
4. Select the graph type, date and time period
5. Click on Create chart defined above icon. (clip board)

How do I print out a report?

Perform Zone's Report area provides some basic printing options.
A 'Print Chart' button appears under graphs.
This button prints the current chart shown onto a single page.

To get more control over your charts, there are two options:

- Copying the data to Excel and creating your own chart.
- Using a 'Print to image' program and altering the image or inserting it into a document.

How do I copy report data into Excel?
Microsoft Excel gives you many complex options for creating charts and doing other data manipulation. To copy the data which produced your chart to Excel, click the 'Copy to clipboard' button located under the chart image. Then open Microsoft Excel and select 'paste'.

Your data will now be in an Excel spreadsheet so you can manipulate it however you want.

Using a 'Print to image' program
Windows has many commercial print to image programs - these create a virtual printer which writes whatever you are printing to an image file instead of a real printer. This image can then be manipulate in a graphics program, such as Microsoft Paint or Photoshop, and the final image inserted into a Word document.

There are many of these programs available, for example: SWF Printer Pro, which can print to a Jpeg, a flash file or a PDF and is freeware.

About reports on Advert response

Perform Zone provides a suite of advertisement reports within the Reports module. These charts are accessible in the category 'Advertisements' - they give you an idea of the response to adverts you have put up, including the source that the responses have some from (we are talking about job applications here).

In summary these charts are:

- New Applications By Source
- Shortlisted Applications By Source
- CV Sent Applications By Source
- Interviewed Applications By Source
- Placed Applications By Source
- Applications By Stage Completed
- Applications By Stage Completed Cumulative
- Placed Applications By Stage Completed
- Placed Applications By Stage Completed Cumulative

Moving Candidates through stages

When an application is moved from one stage to the next (for example from the 'Applied' list to the 'Shortlist' list) a note is recorded in the database about when this happened. These charts then search those notes to get their source numbers. Therefore, 'CV sent' applications refers to the amount of applications moved to the 'CV sent' column - it doesn't measure the amount of CV's actually sent to employers. It is assumed that the recruiter will send the CV when they move the applicant.

For example: 'Shortlisted Applications by Source' counts the amount of applications moved to the shortlist stage in the chosen time period, breaking them up by the recorded source of the application. These charts are useful when determining the effectiveness of advertising.

Candidate Count

If a candidate gets 2 jobs in anytime period, especially if they are a contractor, the application count will be 2, but will only be classed as 1 candidate.

About Candidate Reports

The candidate report is a search of candidates which indicates how many candidates have been placed, based on what the source of the candidate is.
It will make no difference if the candidate is placed 1 or 10 times in anytime period, the report simply indicates that the candidate has been placed.
This will always register on the report graph as 1 candidate who was placed.

About Application Reports

The application report indicates how many application have been placed, based on the source of the application - which may or may not be different to the candidate's source.

For example: if a candidate has been placed 10 times, that means it registers as 10 - because it's a head count of all applications, not of individual candidate's.

1 candidate may have many applications.

The 2 reports are in fact different based on the information above.

Please note: anytime period is a reference to the graphs time period - you can of course set this to anytime you like

About Applications by Source reports

The Source for applications is automatically recorded if you use the built in advert uploader that comes with Perform Zone. The uploader inserts an advert code, called tadv code for each of the source's application URL. This URL is provided to applicants to allow them to get to your application page. This code is then read by the Perform Zone application page and the relevant source is recorded with the application.

Tadv Code list

Tadv	Source
0	website - no external source
1	Seek
2	MyCareer
3	CareerOne
33	SupplyChainJobz
4	Other site - a different web site not on this list
5	Other - a different source.
6	Job Alert - form the internal job alert email system.
7	Newspaper
9	Jobsearch.gov
10	Database - application was created from a database search by a user
12	Unknown - no known source
30	LinkMe
31	Job Alert-manual: a manually created job alert email.
32	JobX
34	Recruiter - application was created manually by a recruiter.
39	Naukri

Applications by Stage Completed

These charts are for users who have multiple page applications setup for the Perform Zone website. The default isn't the case, so this chart is only relevant to specific customizations of Perform Zone.

SETTINGS

About Settings

The Settings area allows you to:

- Add new users, delete users, and update user details.
- Setup job alerts.
- Alter default signatures for emails.
- Alter templates for the summary sheets that can be opened from Perform Zone to produce job summaries and application summaries.
- Change available template categories.
- Change industry and job type lists.
- Alter your integrated website.
- Set up some user defaults

These actions will only be available to you if you are an administrator level user.

Initial set up checklist

Welcome to a very exciting time for your business.
To ensure that you get the most out of Perform Zone, there are a few set up tasks for you to do. (We can do most of these for you at a cost of $150 per hour).

1. **Ensure that you have the minimum computer requirements to run Perform Zone.**
   Note: it is important that you have your internet browser zoom set at 100% and your minimum screen resolution set at least to 1024x768.
   See "What are the Minimum Requirements to run Perform Zone?"
2. **Ensure that your email is set up correctly.**
   (5 minute job per existing user)
   The initial default setting that we set your first account up is set to send your emails from Perform Zone's server.
   This will cause your emails to be caught in some spam filters.
   See "About email account settings"
3. **Add new users**
   (10 minutes per user)
   You can Add, Edit and delete users at any time.
   See "How do I add a new user?"
4. **Set up your email signature**
   (10 - 60 minutes job)
   This allows you to have you email signature defaulted to appear at the bottom of each email that you send through Perform Zone.
   See: "How do I set up my default email signature?"
5. **Set your My Site job board lists**

(30-60 minutes)
This will allow you to customize your candidate's Job Alert subscription lists and My Site drop downs list that candidates use to locate jobs on your site.
See: "How do I edit the Job Function lists?"

6. **Change your Application Confirmation email text**
(5 minute job)
This is the automatic "Application received" confirmation email that job applicants initially receive when they apply online.
Perform Zone supplies you with a generic message.
See: "How do I edit my Automatic Confirmation Email template?"

7. **Link your Job Boards**
(15 minutes per job board, longer if chasing job boards for details)
This will allow you to upload your adverts to job boards such as SEEK etc.
See: "How do I set up a Job Board so that I can load my adverts to them?"

8. **Install email add-ons**
(Optional, 5-10 minutes per PC or user)
Perform Zone supplies two different types of plug-ins for Outlook and one universal email solution.
These allow you to pass email data into Perform Zone
See: "How do I save an email into Perform Zone?"

9. **Migrate your data**
Perform Zone allows you to import CSV (spreadsheet) data for Candidates, jobs, employers and employer contacts.
It can be dangerous as dirty data and inexperience can corrupt your database.
We recommend that you engage Perform Zone to do this for you (contact support for a quote).
See: "How do I Import spreadsheet data?"
You can safely use the Perform Zone resume importer at any time.
The Perform Zone resume importer will allow you to safely and easily extract data from resumes into Perform Zone and attach the resumes to a candidate profile.
See: "How do I import resumes?"

10. **Set up your System templates (~1 hour per template)**
Save time editing common word files such as candidate summaries, terms of business, contracts, placement summaries and more by merging data directly from your Perform Zone's database into your templates.
See: How do I edit a System Template?"

What are Perform Zone Add-Ons?

Add-Ons are optional modules or Perform Zone. Some are free, some are free for a beta test period, and others are paid for.
You can activate them from within the Accounts login at
http://jobs.performzone.com/Login/Software?Login=SA

Current Add-Ons include:

My Site
Allowing you to integrate Perform Zone with your website. Display your jobs, allow candidates to register and much more.
Price: $1500

Email Forwarder
Keep a truly complete CRM by storing all your sent and received emails into Perform Zone. Create your own custom rules on what gets saved, works on all email software.
Price: $90

Tasks
Set your own reminders and automatically create reminders for critical events such as placement starting, contract about to end and placed contractor's licences.
Price: $590

What are the Minimum Requirements to run Perform Zone?

Perform Zone is compatible on PC and Mac platforms.
To use Perform Zone you will need installed on each user's computer:

- The latest versions of Adobe Flash.
- Minimum Internet Browser settings of either:
  - Mozilla Firefox 3.6.6
  - Safari 5.0
  - Google Chrome 5.0
  - Internet Explorer 7
- Screen resolution set to AT LEAST 1024x768. The higher the better.
- The Internet Browser Zoom set to view at 100%
  - Mozilla Firefox: Ctrl+0
  - Safari: Ctrl+0
  - Chrome: Ctrl+0
  - Internet Explorer: Go the View Menu, Select Zoom and change to 100%

Using IPads & iPhones
You'll need to install Proton Flash, available in the Apps store.

How do I increase my upload limit?

Perform Zone's default maximum upload is 2mb.
We have a limit so that users are not exceeding their storage space.

We can increase it for you; just send us an email asking.
Extra costs do apply if you exceed your database storage (see your contract with Perform Zone)

Users

How do I add a new user?

1. Login as a user with Administrator privileges.
2. Click on "Settings"
3. Double left mouse click anywhere in the list of users and press "ADD"
6. Complete all the fields within the Add New user pop up that appears. Then press "CREATE NEW USER".
7. Edit the details on the right hand side of the User Settings page.

How do I delete a user?
1. Go to **Settings**
2. Highlight the Users name from within the **Users** tab.
3. Double left mouse click and select **Delete**.

You do not need to advise Perform Zone that you are adding or deleting a user

How do I get billed for deleting a user mid-month?
Payments are pro rata, so you only pay for the time that your users are active

How do I re-activate a deleted user?
1. Go to **Settings**
2. Highlight the deleted user that you wish to re-activate.
3. Click the **Reactivate User** Button on the left hand screen under their email address field

About email account settings

It is important that your outgoing email is set up correctly.
The Add New User wizard defaults to sending emails via Perform Zone's server.

You will need to edit your email settings if you wish your email to be sent from your ISP.
There are two options to sending email via Perform Zone: directly from PZ or via your ISP.

Sending via your ISP will provide you with bounced email notifications.
It also allows you to get past email servers that require Reverse Lookup, and hence avoid your email being delayed or not accepted.

Your first account is defaulted to be sent "Direct from Perform Zone".
You will need to enter your ISP's details to change this.

You will need to update this for EACH NEW USER when you create their account.

To set up your email to be sent via your ISP
You can do this within Perform Zone, but the best way is to get your IT person to create an SPF record for your Perform Zone IP address within your DNS records.
This will stop your Perform Zone IP address being black listed because it will appear the email is coming from your mail server.

You're Perform Zone support team will be able to advise you of your Perform Zone IP.

To set up from within Perform Zone…

1. Go to the Users tab under Settings
2. Select the user
3. Click on the Edit button located next to Outgoing Email table.
4. Click on the Change button within the "Set-up Email Address" pop up that appears.
5. Initially, you will notice that the "Authentication" Tab will display "Direct from Perform Zone". To enable you to receive bounced email notifications you must change the "Authentication" Tab from "Direct from Perform Zone" to a different Authentication option.
   Selecting a different Authentication option will enable you to input your own SMTP server, Port, Username & password fields
   Port number refers to the outgoing port number, this can normally found by going into your Microsoft Outlook, Mail Settings and then click the advanced tab.
   The User Name and password are your details used by your email client (Outlook, Mac Mail etc..).
   The tick box "Make this address available to all users" allows all users the ability to for all other users of Perform Zone to be able to send from this email address.
6. Click the "TEST" button. If you get an error message "Server not responding" it means you have input the details incorrectly.

Please Note: The SMTP is your "outgoing" mail server. You can retrieve these settings most likely from Microsoft Outlook or by contacting your I.T Admin.
Choose your email carefully, this is the email that candidates will be receiving and potentially responding to!

For Google Email (Gmail):

Display Name: the user own name
Email: full Gmail email address
Authentication: TLS
SMTP Server: smtp.gmail.com
Port: 587
Username: users full Gmail address
Password: the email's password provided by google.

For Office365

Display Name: the user own name
Email: full Gmail email address
Authentication: TLS
SMTP Server: smtp.office365.com
Port: 587
Username: users full Gmail address
Password: the email's password provided by office365

About Global Emails

A Global Email is an additional email that is available to all users.
This allows them to send bulk emails using a general email address such as
jobs@myagency.com
It can also be used in Auto-Job Alerts.

To set a global email:
1. Login with Administrator rights
2. Go to **Settings > Profile**
3. Select any user from the Profile tab
4. Click the **Edit** button next to Outgoing Email
5. Either Change an email or Add a New email address.
6. Click the "**Make this address available to all users**" tick box.
7. **Save**.

NOTE: You can't have two global emails with the same email address. This causes your automated rejection emails to be sent from root@performzone.com

About the Allowed to send Bulk Email tick box

This is handy when you have new staff and you do not want them to accidently send out 1000's of emails with the wrong message.

This feature also prevents the user from sending Bulk rejection emails to candidates.

1. Go to Settings
2. Select the User from the within the Profile Tab
3. Scroll down using the scroll bar on the far right side of the User Settings page
4. Un-tick the Allowed to send Bulk Mail option
5. Save

About user privileges

A person with User privileges does not have full access to the settings options in Perform Zone.

A person with Admin privileges can:

- Add / edit / delete users
- Edit Job alert settings
- Associate system templates
- Edit configurable lists
- Alter Timesheets online setup
- Export / Import data

Web Editor Privileges are used by Perform Zone to assist you with setting up your My Site.

How do I change the Default Home Page from JOBS?

Each User can choose their own Default Home Page (the page they first see when they log in).
The standard Perform Zone set up has the Jobs page as the Default Home Page.
Options are Jobs, Employers or Candidates.
To set the Default Home Page.

1. login as an Admin user
2. Click SETTINGS, select the User, and scroll down to the Default Home Page field.
3. Make your selection and press SAVE
4. Re-login to see your changes.

Your default view shows your own jobs called My Jobs. These are those that you are assigned as a BDM, Account Manager, or Resourcer.

How do I default my jobs country and currency?

To save you time loading job data, you can default your jobs to always appear in a particular region, country or even state.
This is handy when all your jobs are in a particular region or country.

1. Go to SETTINGS and click on your name within the USER tab
2. Scroll down to User Settings on the right hand side
3. Select your defaults and press SAVE

Lists

About editing drop down lists

Perform Zone allows you to configure some of your drop downs lists.

Industry list

This is a list of Industries that you can associate to an employer or candidate when you open a candidate or employer's details.
It is useful when creating reports and determining which candidates have the same industry experience as your employers.

Job Function List

This is list used in candidate's job alerts, searching in your My Site, in your My Site tab and employer floats.
The Job Function lists has two hierarchies. First you choose a Field. This allows you to drill down to a specialisation within that field.
These also appear in your candidates Register page in your default My Site.

Template Categories

This allows you to refine your directories of templates.

Marketing Lists

These are marketing campaigns that you can apply to an employer contact.
They are searchable, allowing you to create campaigns for specific groups of employer contacts

How do I edit the Job Function lists?

The lists for job Field and Specialization for Floats, Job alerts and My Site browsing can be changed by the user at any time.
This list is collectively known in Perform Zone as the Job Function list.
When you first start up Perform Zone you are assigned a default Job Function List.
You can change this list.

To create or edit a Job Function list:

1. Go to SETTINGS
2. Click on the LISTS tab
3. Select Job Function List
4. Double left mouse click on a Specialisation and CHOOSE NEW, EDIT, MERGE or DELETE

How can I edit my templates folders?

The templates Category list is the folders list found under the template Sections; Candidate Communications, Employer Communications and Internal.

To edit this list;

1. Login as user with Admin privileges
2. Go to Settings
3. Click on the Lists tab
4. Highlight Template Categories List
5. Choose your Templates Section from the drop down list
6. Highlight a template category to edit or enter a category name next to the Add button to create a new category.
7. Save changes

About fixed skills library

You can lock down you skills library so that recruiters can't add random skills.
This reduces recruiters creating duplicate skills with different spellings, reduces changes of spelling mistakes and speeds up adding skills to a job.

How do I turn on the fixed skills library?

1.   Go the LISTS tab in SETTINGS,

2.   Check the "Use the checkbox interface" tick box.

How do I add a new Skill to my fixed Skills Library?
1.   Login as a user with Admin privileges
2.   Go to SETTINGS, select the LISTS tab
3.   Select the Skill Autocomplete List from the Drop Down Lists table
4.   On the left hand side, press the ADD NEW SKILL button
5.   Complete the fields below the button and press SAVE

How do I merge two skills?

You can de-duplicate your skills list.

1.   Go the LISTS tab in SETTINGS,
2.   Select "Skill Autocomplete List" form the Drop Down Lists
3.   Select the Skill you want to keep from the Skills AutoComplete List
4.   Use the Combine options to combine skills into the skill you chose to complete

How do I combine Job Skills?

Login as admin…

1.   Go to SETTINGS, then click the LISTS tab
2.   Select Skills AutoComplete List
3.   On the right hand side, select the skill(s) that you want to lose from the Skill Name list
4.   Select the skill you'd like your skill in step 3 to merge with from the "Combine into" drop down list.
5.   Click COMBINE if just losing one skill, click COMBINE MULTI is merging multiple skills into one.

Enforcing workflow

How do I turn off / on the Job Qualifier?
1.   Go to the LISTS tab under the SETTINGS menu
2.   Untick/Tick the Activate Job Qualifier field.

How do I hide recruitment agency related fields?
This is handy if you are an employer.

1.   Go to the LISTS tab under the SETTINGS menu
2.   Untick the Show recruiter Field.

How do I enforce users entering the time spent on a call?
This is handy if you are billing out your time for recruitment services or wishing to do an audit on your business.

1. Go to the LISTS tab under the SETTINGS menu
2. Tick the "Minutes input mandatory on comments"

How do I enforce that users are using the Application Coversheet sending CVs?
1. Go to the LISTS tab under the SETTINGS menu
2. Tick the "Completed Application Sheet mandatory for placement"

How do I enforce that users are completing reference checks before placement?
1. Go to the LISTS tab under the SETTINGS menu
2. Tick the "Completed reference check mandatory for placement"

This means that the user needs to upload at least one reference check against the applicants profile before they will be able to move them to the Placed stage.

How do I enforce that Users must enter a Candidate's or Contacts' email address?
1. Go to the LISTS tab under the SETTINGS menu
2. Tick "New Candidate emails mandatory" and/or "New contact emails mandatory"

Turn off Gun alert from automatically activating when you create a job
1. Go to the LISTS tab under the SETTINGS menu
2. Tick "Create default gun alert search on new jobs"

Turn off Interview Calendar reminder pop up
1. Go to the LISTS tab under the SETTINGS menu
2. Tick the "Automatically show interview dialog in screening"

How do I add a new Marketing campaign to my Marketing drop down?

1. Go to SETTINGS and select the LISTS tab
2. Select Marketing Lists from the Drop Down Lists
3. Press ADD, give your Campaign a name and select any other options you wish from the Edit marketing pop up.
4. Press the UPDATE button to save.

You will need to re-log in to see the changes.

Templates

About System Templates

System templates are templates files that are commonly used within Perform Zone.
These files allow merging of data that you have stored in Perform Zone.

Signature.
Your default signature that appears in every email that is sent from Perform Zone.

Confirm Application
The Email Received by the candidate when they apply for a job online.

Full Application Summaries
Interview summary Word documents accessible when screening them for a job.
Merges your interview notes into a branded word file that you can insert the candidates resume and send off to your employer.

Reference Check
Allows recruiters to access your reference check template in a word format.

Invoice Details
Summaries the placement details for your bookkeeper.

Contract to Candidate.
Your contract template for signing up a contractor.

Contract to Employer for the Candidate.
Your contract template for signing your client up for the services of your contractor.

Standard Terms of business
Allows users to extract and send your terms of business to the employer.

Job Alert.
This is the email that subscribed candidates will receive when you load a job on My Site.

Vacancy Information Summary (VIS).
This is a summary of information of the jobs details.

How do I edit a System Template?

Perform Zone comes with default System Templates.
You can edit them.

1. Go to the ">Templates" link under the "SETTINGS" menu.
2. Change the Section to "Internal"
3. Change the Category to "System Templates"
4. Locate and highlight your system template
5. Click on the Edit This Template icon
6. Make the changes you wish the body of the template and press save.

How do I assign a template as a system template?

1. Select Settings from the main menu.
2. Select the Templates tab

3. Locate the area that your System Template appears in from the "Assign Templates for" drop down
4. Select your System template from the Standard Templates list.
5. Find the your newly created template by using the "Select new template to use" search options
6. Highlight your new template in the Template list
7. Press the "Set template as default" button

How do I set up my default email signature?

Create the signature

1. Go to the "Templates" link under the "SETTINGS" menu on the left hand side.
2. Change the Section to "Internal"
3. Change the Category to "System Templates"
4. Double left mouse click in the Templates list and select ADD from the pop up.
5. In the editor type "Signature" into the template Title
6. Create your signature content.
   A good idea is to leave the first line blank, it makes it easier for users to type in their emails later.
7. Insert your merge fields by either using the Merge: drop down menu, or typing in the Merge field codes. Commonly used signature Merge field codes are:
   Full name {username}
   Title {user.usertitle}
   First name {user.userfirstname}
   Last name {user.usersurname}
   Position title {user.userjobtitle}
   Qualification {user.userqualification}
   Email {user.useremail}
   Full address {user.useraddress}
   State (address) {user.userstate}
   Street {user.userstreet}
   Suburb {user.usersuburb}
   Country {user.usercountry}
   Postcode {user.userpostcode}
   Mobile number {user.usermobile}
   Home phone {user.userhomephone}
   Business phone {user.userbusinessphone}
8. Insert your images.
   Save your image to the web (your web site for example)
   Click the Image button in the Perform Zone's editor toolbar.
   Paste in your images full URL. Click "OK"}
9. Add your web site URL using the Link icon in the editor tool bar.
10. Press "Save" Template

Assign your template as the Default Signature

1. Go to Settings.
2. Click on Templates tab.
3. In the Assign Templates for drop down select Signatures.
4. Highlight Signature in the box below the drop down.
5. Locate the Signature template you previously created under the Select new template to use area.
6. Click the "Set Template as Default" button.

How do I edit my email signature template?
1. Select "Settings"
2. Select the Templates tab
3. Select your Signature from the Assign Templates from the drop down
4. Highlight your signature in the Table and then
5. Press the "Edit This Template" button

How do I locate my outlook Signatures HTML?
You can insert HTML code directly into your templates by using the SOURCE button in the editor.

1. Open a new email and Save As a html file to your PC
2. Open the saved file in an Internet Browser
3. In the browser, select the option to view the HTML
4. Select and copy all the HTML to your click board.

What options have I have for formatting my Signature template?
The editor can be configured in several different ways - by us at your request. Check with Perform Zone on any specific charges dependent on your contract for performing configuration.

We can, for example:

- Change the default style of your editor and all emails that go out including;
- Setting a default font and font size and colour
- Setting a background colour
- Setting a background image

Many other things that you can achieve using CSS

These are achieved by wrapping your email contents in a HTML 'body' statement with the CSS given as a style in the final email (don't worry if you don't get this, this description is for advanced users with knowledge of HTML).

If you have a specific request please contact us.
We'll let you know if they are possible and what it will cost.

How do I edit my Automatic Confirmation Email template?

After an applicant completes their application online, they are emailed a default application confirmation email. This email is called "Confirm Application".

To edit:

1. Go to Settings
2. Go to the Templates tab
3. Under the Configurable System templates, change the drop down menu to Web Site Responses.
4. Highlight "Confirm Application"
5. Click the "Edit this template" button and make changes to your template.
6. Save changes to the template

How do I set-up / edit my "Standard rejection" email template?

1. Create / edit your template from within the Templates folder under SETTINGS.
   You may want to use the {jobtitle} and {jobid} merge fields in your template.
   A Best Practice suggestion is to create a category folder under the "internal" section called "System Templates" and save all your system generated templates there.
2. Assign the template as the Standard Rejection Letter System Template by:
   1. Go to SETTINGS and click the Templates tab,
   2. Select "Application Summaries" from the "Assign Templates for" drop down,
   3. Locate and select your new template to use from the search templates list on the right hand side of the page.
   4. Click the "Set Template as Default" button.

Job boards

How do I set up a Job Board so that I can load my adverts to them?

Perform Zone comes with a selection of integrated job boards that you can upload your jobs to. These include SEEK, MyCareer and CareerOne.
You will need to contact the job board to set an account with them first.
They will provide you with an account number.
You will be able to upload your adverts into your advertisement template for that job board once you have saved that account number into your Perform Zone settings

To do this:

1. Contact your Job Board's Account Manager and request that they activate Perform Zone to be your uploader.
   Advise them that you are using Perform Zone as your uploader and require a "link out".

The link out that you quote to them is http://<your company name>.performzone.com/app.php.

2. In Perform Zone click on Settings
   Click on Job Boards tab, scroll down to the bottom of the left hand screen using the scroll bar in the middle of the screen. Click on the Job Board you want to activate.
3. Enter the data requested in the fields on the right hand side of the screen.
4. Click Save Changes

Allowing candidates to apply for your job from the unsupported job board.

Not all Job Boards are supported by Perform Zone but there are still ways to use these job boards within the Perform Zone software.
In this instance you will manually have to post the advert on the unsupported job board site and then provide links back to your advert.

If you have the My Site, you can use your jobs URL on your site.
If you don't have the My Site, The format of the link is:

http://69.164.195.105/app.php?jref=1818

The "http://69.164.195.115" is replaced by your Perform Zone web address you use when you log in (for example company.performzone.com.au)
Your job reference number (jref) is the last four numbers (in the example above this is 1818).
You will need to change this to your Perform Zone job reference number.
Candidates who use this link will show their source in Perform Zone as "Website"

Allowing candidates to register into your database from the unsupported job board.

There are three ways we can see:

1. Ask them in your advert to send you an email.
   Once in your inbox you can use the email plugins
   Candidates who use this method will have their source shown in Perform Zone as the name of the recruiter that registered them in using the outlook plug-in.
2. If you have the My Site, insert the URL for your websites registration page into your advert.
3. If you don't have the My Site, direct them to http://69.164.195.105/reg.php, where you replace "http://69.164.195.105" with your Perform Zone URL of the same form (for example company.performzone.com.au).
   Candidates who use this link will show their source in Perform Zone as "Website"
   This page won't allow styling.

How do I allow Perform Zone to post adverts to my SEEK account?

1. Contact SEEK's support hotline on 03 8306 0873 and advise them that you'd like to use Perform Zone to upload your jobs. They will send you an email that may look like this:

> This email is to follow up on the request to have Perform Zone set up as your third party provider on your account.
>
> To help us get this relationship set up on your account(s), could you please reply to this email confirming you would like Perform Zone to act on your behalf to facilitate the below SEEK activities. This means that paragraph 19(f) of the Advertising Terms and Conditions https://talent.seek.com.au/Support/TermsConditions will apply to you, if you could therefore please ensure you review this.
>
> • Fastlane – Upload job ads to the SEEK website.
> • SEEK Application Export – Retrieve job applications directly from SEEK.
>
> As soon as we receive this confirmation we will work with Perform Zone to ensure everything is set up for you.

2. You'll need to confirm your acceptance in an email back to them.
   SEEK will then send both of us an email advising that they have set you up.
   In that email will be your SEEK ID.
3. Click on SETTINGS in the left hand menu, select the JOB BOARDS tab.
4. Select SEEK from the Currently Available Job Boards table.
5. On the right hand side, enter your SEEK ID as provided by SEEK.
   Add your Template, standout logo and Screen ID's (optional), ensuring they have a Description set.
6. Click "Allow Perform Zone to download applications from SEEK"
7. Press ACTIVATE BOARD
8. Click "Do Upload"
9. Press "Save Changes"

If the adverts do not appear on the hour after posting, please first contact SEEK and check that your SEEK account has been activated so as to allow posts from Perform Zone (step 1). Also check with them your SEEK ID (step 5) is correct.

How do I activate SAE (SEEK Application Export)?

10. Contact SEEK and request that they activate SAE for you.
11. Once SEEK has activated SAE, login to Perform Zone as a User with Administrator privileges.
12. Click on Settings in the left hand menu.
13. Click on the Job boards tab
14. Select SEEK from the currently available job boards table
15. Scroll down with the Basic Specific info: fields on the right hand side and click "Allow Perform Zone to download applications from SEEK.
16. Select a "Date to download from:" that was before SAE was activated by SEEK.
17. Press "Save Changes"}

Seek applications that were made after SAE was activated will be exported from SEEK. From then on applicants will continue to be exported every 20 minutes from SEEK, starting on the hour. The applicants will appear in your jobs Applied list.

How do I advertise different brands in my job boards?

Set your Users brand using the Department field in their settings.
Go to the Job boards tab in Settings and enter the merge field {dept} into the Advertise Name field.
Press Commit Change.

What is the Security Clearance field?

Some Government panels require Applicants to have a security clearance.
These are in order of seniority (lowest to highest);

- **Baseline** (Baseline Vetting): permits access to classified information/resources up to and including PROTECTED.
- **NV1** (Negative Vetting Level 1): permits access to classified information/resources up to and including SECRET.
- **NV2** (Negative Vetting Level 2): permits access to classified information/resources up to and including TOP SECRET.
- **PV** (Positive Vetting): permits access to resources at all classification levels, including certain types of caveated and code word information.

Once activated, the Security Clearance a field appears in:

- Job Details, Phone Screening and Candidate Profile forms
- Applicants list as a hide / show column
- Resume Search

To activate, call Perform Zone.

How do I activate Time Sheets Online?

1. Go to **Settings** tab.
2. Click **Timesheets**
3. Under **Time Sheets Online** fill out all the appropriate details below.
   API Key (For an API Key please contact TSO) **TimeSheetsOnline**
   Username and Password
   URL: https://api.timesheetsonline.com.au/webservice/
   You can contact the Timesheets Online Helpdesk 8am to 6pm Monday thru Friday (EST) on 1300 794 070 or helpdesk@astutepeople.com.au if you need further assistance.
4. Click confirm and Test
   Timesheets has now been setup.
   This will activate the **Timesheets** online button in the **Placement** area.

Manage

How do I re-assign stakeholders?

When a user moves on from their area, you may wish to re-assign all their employers and candidates to another user.

1. Go to **Settings**
2. Click on **Manage** tab
3. Click on on **Re-associate User Records**
4. On the right hand page, select **Users** to move associations to and from.
5.

DATA

About importing spreadsheets

CSV files can be imported to create new or update existing Job, Employer, Contact or Candidate data.
Only ADMIN users can import data.

The best data to match on is the Perform Zone ID number for the contact. If you don't have this, the next best is the contacts email address. If there are two contacts with the same email they both will be updated with the new details. Using other fields is dangerous as they are not unique. Using a combination of a unique field (email or contact ID) with other fields is safe, but may result in an incomplete import due to the logic of what you are attempting.

The Use for Match drop down allows you to apply logic to your data import.
For example: By selecting the Use For Match boxes for First name, Surname and Email Address and ticking the import method "import new, update matched", all records in the database that have the same First name, Surname and Email Address will have their details updated, if there is no match found then a new record is added.

You can also Save Assignments to save what column assignments you want, so you can return to do the import later (if you aren't sure about a complex import for example).
The system is intelligent enough to recognize certain common column headings and has pre-assigned all Perform Zone columns fields.

How do I Import spreadsheet data?

Ensure that you have followed the Perform Zone CSV file format rules

1. Go to a list showing the type of data you want to import in (Candidates, Jobs, Employers or Employer Contacts)
2. Click the import button from with the ACTION button's list.
3. Select upload and attach your CSV file.
4. Highlight the file in the Files for Importing Tab and click Prepare >>.
   The **import** column shows the first row of your CSV file. It is the header that describes the type of data in your CSV columns.
   The **example data** column shows data from the second row in your CSV file. It is sample of the data you are going to import.
   The **database fiel**d column shows the field in Perform Zone that your data in that row will map to.
   The **Use for Match** column, allows you to tell the system what you want to use to match these new records up with previously entered records.

   The best data to match on is the Perform Zone ID number for the contact. If you

don't have this, the next best is the contacts email address. If there are two contacts with the same email they both will be updated with the new details. Using other fields is dangerous as they are not unique. Using a combination of a unique field (email or contact ID) with other fields is safe, but may result in an incomplete import due to the logic of what you are attempting.

5. Associate each row in the Import Column to the appropriate Database field.
6. Select the row, choose the field from the assign field column drop down.
7. Select the rows that you want to use as a match.
8. Select the Import Method option
9. Click Begin Import >>
10. Progress of the import will be shown on the Files currently importing list.
11. Once completed the file will move to the previously imported files list.

How do I export spreadsheet data?

Only ADMIN users can export data.
CSV files can be exported from Job, Employer, Contact or Candidate lists.

1. Run a search to show the data that you'd like to export
2. Select Export from the ACTION button.
3. Select all the data fields you want to export by ticking the boxes in the list.
4. Type in the name of the file you want to export – this is so you can identify it later.
5. Click the 'Begin Export' button – this will start the export and the records exported will show on the list to the right.
   You can close the window and logout of Perform Zone if it's a large export – it will be waiting for you in the export window next time you log in.
6. Click Refresh List. Once the export shows 'Complete' in the list, you can double click it, and the option to 'download' will appear.

How do I re-assign a list of employers to another recruiter?

You can do this by either a CSV import or via the Settings option.

Reassigning Employer stakeholders via CSV import
1. When importing your updated CSV file, assign the stakeholder column to "Clear Stakeholder" instead of "Stakeholder"
2. Ensure that the file includes the stakeholder field.
3. Update the stakeholder in the excel file.
4. Upload the updated excel file into the CVS importer tool
5. Assign the Stakeholder column to "Clear Stakeholder" This removes all the existing stakeholders.
6. Import as usual.

When you go to export these employers again, the de-activated stakeholders will appear in the CSV file. These won't appear in your Perform Zone interface.

About exporting backup Data from Perform Zone

As an Admin user you can export basic most data associated to candidates, employers, contacts, and jobs.
We have a FTP backup tool that allows you to schedule backups to your own computer.
Once set up, you will need to run a script to package up your data into CSV files and Zip up your attachments.
This script is best scheduled to run overnight, allowing you to extract your data the next day.
You'll need to set the schedule before 7pm as it runs at 7pm.

The set up cost for the FTP facility is $370.
There are no additional charges.

Email support@performzone.com.au to request the facility to be set up.
It usually takes one working day to set up.

Note: all outstanding payments need to be paid before the facility can be set up.

How do I combine profiles?

Perform Zone allows you to merge/combine Candidates, Contacts, Employers and job skills profiles. This allows you to de-duplicate your database. Perform Zone also alerts you when you try to create duplicate Candidates, Contacts or Employers.

How do I combine duplicate Candidates?

Duplicate Candidates are detected based on them having the same email address.

Combining will create multiple copies of the candidate's skills, applications, attachments, marketing and referees. This ensures you don't lose data.
If before the combine your kept candidate had empty fields and data existing in the duplicate candidates same fields, the data from the duplicates will populate the empty fields.
The data in the kept candidate fields are maintained (e.g. phone number, interview notes), the combined candidate's data is lost.

Any User can combine Candidates.

1. Open the Candidate that you want to combine the duplicates into.
   If another candidate with the same email address exists, you will see an alert at the bottom on the page and a COMBINE button.

2. Press COMBINE

3. A pop-up appears, press YES.
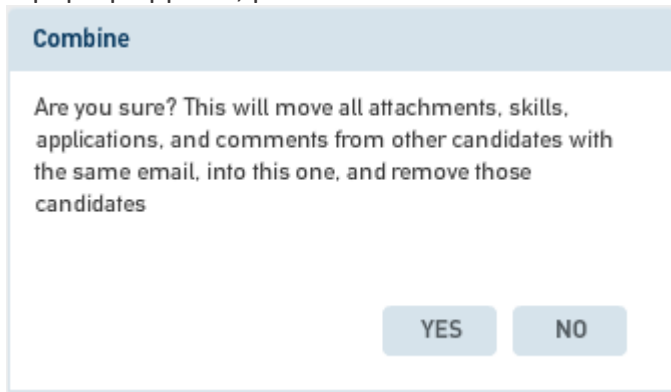
The combining is complete once the text Combined appears at the bottom of your page.

How do I combine duplicate Contacts?

Duplicate Contacts are detected based on them having the same email address.

Combining will create multiple copies of the Contacts attachments and marketing.
This ensures you don't lose data.
If before the combining, your kept Contact had empty fields, the data from the duplicates will populate the empty fields.
The data in the kept Contact fields are maintained (e.g. phone number, position), the combined Contacts' data is lost.

Any User can combine Contacts

1. Open the Contact that you want to combine the duplicates into.
   If another Contact with the same email address exists, you will see an alert at the bottom on the page and a COMBINE button

2. Press COMBINE

3. A pop-up appears, press YES.
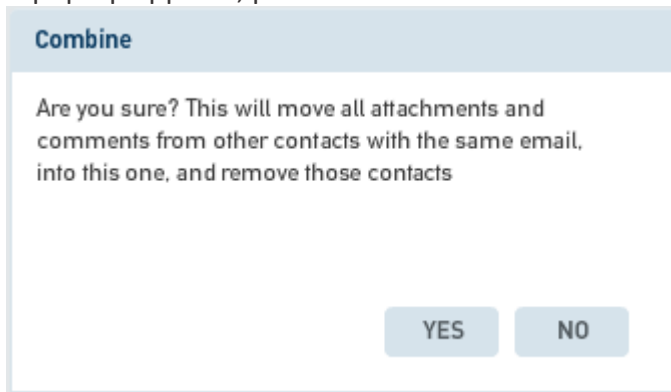
The combining is complete once the text Combined appears at the bottom of your page.

How do I combine duplicate Employers?

Duplicate Employers are detected based on them having the same Employer name.

Combining will create multiple copies of the Employers Contacts, attachments, notes and jobs. This ensures you don't lose data.
If before the combining, your kept Employer had empty fields, the data from the duplicates will populate the empty fields.
The data in the kept Employer fields are maintained (e.g. phone number, address), the combined Contacts' data is lost.

Any User can combine Employers

1. Open the Employer that you want to combine the duplicates into.
   If another Employer with the same email address exists, you will see an alert at the bottom on the page and a COMBINE button

2. Press COMBINE

3. A pop-up appears, press YES.
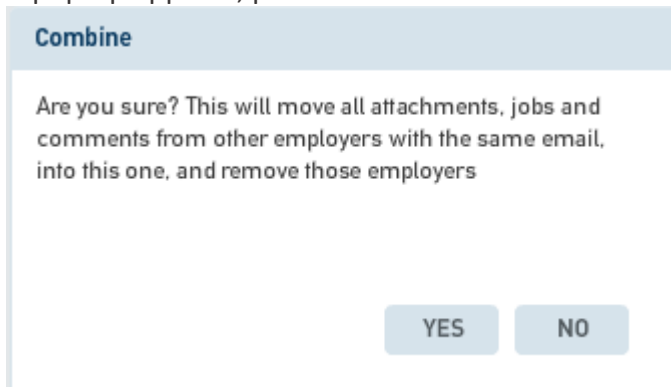
The combining is complete once the text Combined appears at the bottom of your page.

How do I un-combine data?

1. Select the ACTION button and select RESTORE
2. Select the data that was combined.
3. Press RESTORE in the Restore Deleted Data pop up.

TASKS

About the Tasks Odd-On

The TASKS add-on allows you to set calendar reminders manually and also creates important reminders automatically. You can see your Tasks on one page and link to information related to the task with one click (say the employer contacts profile that you wish to call back).

Tasks that are created automatically are called "System Tasks".
System tasks created are:

- Placed candidate start dates, end dates and Guarantee end dates.
- Expiry of job ready licences
- Advertisement expiry date

Upon logging into Perform Zone, a reminder pops up showing your most overdue task.

The number of tasks overdue and due today are shown in a red circle in the TASKS button in the main menu on the left of your screen.

Clicking on the red circle in the TASKS button displays a reminder pop up of the most overdue or next due today task. This reminder pop up appears at the bottom of the screen.

In your tasks list view, you can hyperlink to the associated job, contact, employer, user and candidate. You can do this by selecting them from their cell against your task.

You can also export your tasks to a CSV file.

When am I reminded?

You can set your own reminder date when you create a task.
You can also open system tasks and edit the default reminder date.

The default reminder for a contract ending is two weeks before its end date.

How do I add a task?

Tasks are added with the COMMENT pop up.
Scheduling a due date in the Comments pop up will create a task.

How do I search TASKS?

1. Click TASKS in the left hand menu
2. Display search options by pressing the SEARCH button

Keyword search

Searches on Category, text in your task's summary and content, candidate name employer name, job title, contact name.

Due date

Searches on tasks that start 0.00 after your start date and before 24.00 of your end date, all relative to your PC's time.

I can't see my tasks in the tasks list

The default view in TASKS is to show **status = Overdue, Due today and reminders** for today. This allows you to see all the critical tasks that need to be actioned today.

If you change **Status = All** you will see all the tasks, this includes active, completed and deleted tasks.

How do I create a task?

Tasks are created in the COMMENTS pop up.

You create a task by adding a due date in the COMMENTS pop up.

They can be associated to Employers, Contacts, Candidates, Jobs and Users.

You can also create your own personal task by from within the Tasks list view by double left mouse clicking and selecting NEW from the pop up, or selecting NEW from the ACTION button.

How do I complete a task?

Either:

Select task from the tasks list view and either double left mouse click on the Task and press COMPLETE from the pop up that appears or select the tasks from the TASK list and press COMPLETE from the ACTION button.

OR

Click on the reminder pop up and change the Status field in the Update Tasks pop up to Complete.

What happens if I delete a task?

Tasks can be deleted by using the DELETE option in the ACTION button options when you are looking at your tasks list. They can also be deleted in the Notes tab of your tasks associated job, candidate, employer and contacts.

You can restore deleted tasks by using the RESTORE option in the task list's ACTION button.

How do I export my Tasks?

Run a search in TASKS to locate the tasks that you'd like to export.
Select EXPORT from the ACTION button

NB: we don't have an import function for tasks.

MERGE FIELDS

Job merge fields

Output Needed	Merge Field Required
Job title	{jobtitle}
Job ID	{job.id} or {job.idnumber}
Street address for job location	{street}
Street address for job location	{address}
Suburb for job location	{suburb}
State location for job location	{state}
Country for job location	{country}
Region for job location	{region}
Post code for job location	{postcode}
Date added for job	{dateadded}
Date created for job	{added}
Date created for job	{created}
Work type for the job. e.g. perm, contract	{worktype}
Description of job	{jobdescription}
Description of job	{description}
Description of job	{advert}
Teaser for job	{teaser}
Teaser for job	{webteaser}
Description of job	{details}
Minimum salary for job	{minsalary}
Minimum salary for job	{salarymin}
Maximum salary for job	{maxsalary}

Maximum salary for job	{salarymax}
Number of total staff at employer	{numstaff}
Main product of employer	{productssold}
Web page address for employer	{webpage}
Web page address for employer	{url}
Industry position of employer	{industryposition}
Employer name for the job	{clientname}
Employer name for the job	{employername}
Career options for the job	{careerops}
History of the employer	{history}
Street address for employer location	{clientstreet}
Suburb for employer location	{clientsuburb}
Postcode for employer location	{clientpostcode}
Country for employer location	{clientcountry}
State for employer location	{clientstate}
Contact name for the job at client	{contactname}
Contact email address for the job at client	{contactemail}
Contact phone number for the job at client	{contactphone}
Motivation for the job	{motivation}
Number of positions for the job	{positions}
Security clearance for the job	{security}
Allowance for the job. e.g. car/bonus	{salarybonus}
Advertise rate for the job	{advertisedrate}
Recruiter Name	{username}
Recruiter Name	{recruitername}
Resourcer's Name	{resourcername}
Account manager name	{amname}

Account manager name	{amuser}
Account manager email	{amemail}
Account manager phone	{amphone}
Business development manager name	{bdmname}
Business development manager name	{bdmuser}
Business development manager email	{bdmemail}
Business development manager phone	{bdmphone}
Email address of recruiter	{user.useremail}
First name of recruiter	{user.userfirstname}
Last name of recruiter	{user.usersurname}
state address for recruiter location	{user.userstate}
Street address for recruiter location	{user.userstreet}
Street address for recruiter location	{user.useraddress}
Suburb for recruiter location	{user.usersuburb}
Country for recruiter location	{user.usercountry}
Postcode for recruiter location	{user.userpostcode}
Mobile number for recruiter	{user.usermobile}
Home phone for recruiter	{user.userhomephone}
Business phone for recruiter	{user.userbusinessphone}
Fax number for recruiter	{user.userfax}
Position title for recruiter	{user.userjobtitle}
Title for recruiter	{user.usertitle}
Qualification of recruiter	{user.userqualification}
Email address of recruiter	{user.email}
First name of recruiter	{user.firstname}
Last name of recruiter	{user.surname}
state address for recruiter location	{user.state}

Street address for recruiter location	{user.street}
Street address for recruiter location	{user.address}
Suburb for recruiter location	{user.suburb}
Country for recruiter location	{user.country}
Postcode for recruiter location	{user.postcode}
Mobile number for recruiter	{user.mobile}
Home phone for recruiter	{user.homephone}
Business phone for recruiter	{user.businessphone}
Fax number for recruiter	{user.fax}
Position title for recruiter	{user.jobtitle}
Title for recruiter	{user.title}
Qualification of recruiter	{user.qualification}
Email address of Resourcer	{resourcer.useremail}
First name of Resourcer	{resourcer.userfirstname}
Last name of Resourcer	{resourcer.usersurname}
State address for Resourcer	{resourcer.userstate}
Street address for Resourcer	{resourcer.userstreet}
Full address for Resourcer	{resourcer.useraddress}
Suburb for Resourcer location	{resourcer.usersuburb}
Country for Resourcer location	{resourcer.usercountry}
Postcode for Resourcer location	{resourcer.userpostcode}
Mobile number for Resourcer	{resourcer.usermobile}
Home phone for Resourcer	{resourcer.userhomephone}
Business phone for Resourcer	{resourcer.userbusinessphone}
Fax number for Resourcer	{resourcer.userfax}
Position title for Resourcer	{resourcer.userjobtitle}
Title for Resourcer	{resourcer.usertitle}

Qualification of Resourcer	{resourcer.userqualification}
Email address of Resourcer	{resourcer.email}
First name of Resourcer	{resourcer.firstname}
Last name of Resourcer	{resourcer.surname}
state address for Resourcer location	{resourcer.state}
Street address for Resourcer location	{resourcer.street}
Street address for Resourcer location	{resourcer.address}
Suburb for Resourcer location	{resourcer.suburb}
Country for Resourcer location	{resourcer.country}
Postcode for Resourcer location	{resourcer.postcode}
Mobile number for Resourcer	{resourcer.mobile}
Home phone for Resourcer	{resourcer.homephone}
Business phone for Resourcer	{resourcer.businessphone}
Fax number for Resourcer	{resourcer.fax}
Position title for Resourcer	{resourcer.jobtitle}
Title for Resourcer	{resourcer.title}
Qualification of Resourcer	{resourcer.qualification}
Email address of recruiter	{recruiter.useremail}
First name of recruiter	{recruiter.userfirstname}
Last name of recruiter	{recruiter.usersurname}
state address for recruiter location	{recruiter.userstate}
Street address for recruiter location	{recruiter.userstreet}
Street address for recruiter location	{recruiter.useraddress}
Suburb for recruiter location	{recruiter.usersuburb}
Country for recruiter location	{recruiter.usercountry}
Postcode for recruiter location	{recruiter.userpostcode}
Mobile number for recruiter	{recruiter.usermobile}

Home phone for recruiter	{recruiter.userhomephone}
Business phone for recruiter	{recruiter.userbusinessphone}
Fax number for recruiter	{recruiter.userfax}
Position title for recruiter	{recruiter.userjobtitle}
Title for recruiter	{recruiter.usertitle}
Qualification of recruiter	{recruiter.userqualification}
Email address of recruiter	{recruiter.email}
First name of recruiter	{recruiter.firstname}
Last name of recruiter	{recruiter.surname}
state address for recruiter location	{recruiter.state}
Street address for recruiter location	{recruiter.street}
Street address for recruiter location	{recruiter.address}
Suburb for recruiter location	{recruiter.suburb}
Country for recruiter location	{recruiter.country}
Postcode for recruiter location	{recruiter.postcode}
Mobile number for recruiter	{recruiter.mobile}
Home phone for recruiter	{recruiter.homephone}
Business phone for recruiter	{recruiter.businessphone}
Fax number for recruiter	{recruiter.fax}
Position title for recruiter	{recruiter.jobtitle}
Title for recruiter	{recruiter.title}
Qualification of recruiter	{recruiter.qualification}
Email address of BDM	{bdm.useremail}
First name of BDM	{bdm.userfirstname}
Last name of BDM	{bdm.usersurname}
state address for BDM location	{bdm.userstate}
Street address for BDM location	{bdm.userstreet}

Street address for BDM location	{bdm.useraddress}
Suburb for BDM location	{bdm.usersuburb}
Country for BDM location	{bdm.usercountry}
Postcode for BDM location	{bdm.userpostcode}
Mobile number for BDM	{bdm.usermobile}
Home phone for BDM	{bdm.userhomephone}
Business phone for BDM	{bdm.userbusinessphone}
Fax number for BDM	{bdm.userfax}
Position title for BDM	{bdm.userjobtitle}
Title for BDM	{bdm.usertitle}
Qualification of BDM	{bdm.userqualification}
Email address of BDM	{bdm.email}
First name of BDM	{bdm.firstname}
Last name of BDM	{bdm.surname}
state address for BDM location	{bdm.state}
Street address for BDM location	{bdm.street}
Street address for BDM location	{bdm.address}
Suburb for BDM location	{bdm.suburb}
Country for BDM location	{bdm.country}
Postcode for BDM location	{bdm.postcode}
Mobile number for BDM	{bdm.mobile}
Home phone for BDM	{bdm.homephone}
Business phone for BDM	{bdm.businessphone}
Fax number for BDM	{bdm.fax}
Position title for BDM	{bdm.jobtitle}
Title for BDM	{bdm.title}
Qualification of BDM	{bdm.qualification}

Email address of AM	{am.useremail}
First name of AM	{am.userfirstname}
Last name of AM	{am.usersurname}
state address for AM location	{am.userstate}
Street address for AM location	{am.userstreet}
Street address for AM location	{am.useraddress}
Suburb for AM location	{am.usersuburb}
Country for AM location	{am.usercountry}
Postcode for AM location	{am.userpostcode}
Mobile number for AM	{am.usermobile}
Home phone for AM	{am.userhomephone}
Business phone for AM	{am.userbusinessphone}
Fax number for AM	{am.userfax}
Position title for AM	{am.userjobtitle}
Title for AM	{am.usertitle}
Qualification of AM	{am.userqualification}
Email address of AM	{am.email}
First name of AM	{am.firstname}
Last name of AM	{am.surname}
state address for AM location	{am.state}
Street address for AM location	{am.street}
Street address for AM location	{am.address}
Suburb for AM location	{am.suburb}
Country for AM location	{am.country}
Postcode for AM location	{am.postcode}
Mobile number for AM	{am.mobile}
Home phone for AM	{am.homephone}

Business phone for AM	{am.businessphone}
Fax number for AM	{am.fax}
Position title for AM	{am.jobtitle}
Title for AM	{am.title}
Qualification of AM	{am.qualification}
Name of the employer	{client.name}
Name of the employer	{client.clientname}
Name of the employer	{client.employername }
Name of the employer	{client.employer }
State for employer location	{client.state }
Street address for employer location	{client.street }
Street address for employer location	{client.streetaddress }
Address for employer location	{client.address }
Postcode for employer location	{client.postcode }
Postcode for employer location	{client.pcode }
Suburb for employer location	{client.suburb }
City for employer location	{client.city }
ABN number for employer	{client.abn }
ACN number for employer	{client.acn }
Phone number for employer	{client.phone }
Toll free number for employer	{client.tollfree }
Fax number for employer	{client.fax }
Name of the employer	{employer.name}
Name of the employer	{employer.clientname}
Name of the employer	{employer.employername }
Name of the employer	{employer.employer }
State for employer location	{employer.state }

Street address for employer location	{employer.street }
Street address for employer location	{employer.streetaddress }
Address for employer location	{employer.address }
Postcode for employer location	{employer.postcode }
Postcode for employer location	{employer.pcode }
Suburb for employer location	{employer.suburb }
City for employer location	{employer.city }
ABN number for employer	{employer.abn }
ACN number for employer	{employer.acn }
Phone number for employer	{employer.phone }
Toll free number for employer	{employer.tollfree }
Fax number for employer	{employer.fax }

Application merge fields

Merge Field	Contains
{positiontitle} {title} {jobtitle} {name}	The title you have given this job in the job details section. Any of the 4 on the left will work.
{id} {idnumber} {number}	The Candidate's ID number.
{street} {address}	The street address entered for this job.
{suburb}	The suburb address entered for this job.
{state}	The state for this job.
{country}	The country for this job.

{postcode}	The post code for the address of this job.
{dateadded} {added} {created}	The date this job was created in the Perform Zone system.
{worktype}	A description of the type of work for the job, for example 'Permanent Full Time'.
{jobdescription} {description} {details}	The text entered into the 'Duties of position' input box.
{advert}	The advertisement entered for this job.
{teaser} {webtease}	The teaser entered for this job.
{minsalary} {salarymin}	The minimum salary entered for this job.
{maxsalary} {salarymax}	The maximum salary entered for this job.
{numstaff}	The number of staff at the employer entered in the job details section.
{clientname} {employername}	The name of the employer.
{bdmname}	The full name of the BDM.
{bdmemail}	The BDM's email address.
{bdmphone}	The BDM's phone number.
{bdm.*}	A block allowing access to the full BDM merge fields, so for example; {bdm.mobile} gives the BDM's mobile number, {bdm.firstname} gives the BDM's first name.
{amname}	The full name of the AM.
{amphone}	The AM's email address.
{amemail}	The AM's phone number.
{am.*}	A block allowing access to the full AM merge fields, so for example; {am.mobile} gives the AM's mobile number, {am.firstname} gives the AM's first name.
{username}	The full name of the recruiter.

{user.*}	A block allowing access to the full recruiter merge fields, so for example; {user.mobile} gives the recruiter's mobile number, {user.firstname} gives the recruiter's first name.
{clearance}	The security clearance level required for this job.
{positions}	The total number of positions needed for this job.
{adrate}	The advertised salary for this job.
{priority}	The priority for this job.
{numcv}	The number of non-rejected applications at the CV sent stage.
{numint}	The number of non-rejected applications at the interview stage.
{numshortlist}	The number of non-rejected applications at the shortlist stage.
{numactive}	The number of non-rejected applications at the Applied stage.
{clientsuburb}	The employer's suburb.
{clientstate}	The employer's state.
{clientpostcode}	The employer's post code.
{clientcountry}	The employer's country.
{contactname}	The Contact's full name.
{contactemail}	The Contact's email.
{contactphone}	The Contact's phone.
{sendcontactname}	The send application to contact's full name.
{sendcontactemail}	The send application to contact's email.
{sendcontactphone}	The send applications to contact's phone.
{reportscontactname}	The reports to contact's full name.
{reportscontactemail}	The report to contact's email.
{reportscontactphone}	The reports to contact's phone.
{skills}	A container with a list of all the current skills entered into the job. You can step through this list by doing the below:

{repeat skills as skill} {skill.current+1}. {skill.name} {endrepeat}

This will step through the list showing the name of each skill. |

Invoice Merge Fields

Output Needed	Merge Field Required
Placement Percentage	{placedpercentage}
Invoice date	{invoicedate}
Invoice contact name	{invoicer.firstname}{invoicer.surname}
Invoice contact position	{invoicer.position}
Invoice contact landline	{invoicer.phone}
Invoice contact fax	{invoicer.fax}
Invoice contact mobile	{invoicer.mobile}
Invoice contact email	{invoicer.email}
Invoice contact country	{invoicer.country}
Invoice contact state	{invoicer.state}
Invoice contact suburb	{invoicer.suburb}
Invoice contact address	{invoicer.postcode}
Invoice contact postcode	{worktype}
Employer trading name	{client.name}
Employer ABN	{client.name}
On employer books/on our books	{contractholder}
Actual agreed buy rate	{buyrate}
Actual agreed sell rate	{sellrate}
Payment interval	{payinterval}
Payment frequency	{payfrequency}
End date	{enddate}
Employer terms	{empterms}
Job country	{jobcountry}
Job state	{jobstate}

Contractors Company name	{companyname}
Contractors A.C.N	{acn}
Timesheets approvers first name	{approver.firstname}
Timesheets approvers surname	{approver surname}
Timesheets approvers email	{approver.email}
Timesheets approvers phone	{approver.phone}
Timesheets approvers mobile	{approver.mobile}
Timesheets approvers fax	{approver.fax}
Timesheets approvers position	{approver.position}
Send to Timesheets online	{tso}
The salary the candidate wants	{salary sought}
Actual agreed salary	{salary}
Include salary package in invoice	{incpackage}
ID of the employer terms	{emptermsid}
ID of the approver contact	{approvercontactid}
Approver contact information	{approvercontact}
Invoice contact information	{invoicecontact}

Candidate merge fields

Output Needed	Merge Field Required
First name of the candidate	{firstname}
First name of the candidate	{first}
First name of the candidate	{namefirst
First name of the candidate	{fname}
Last name of the candidate	{surname}
Last name of the candidate	{sname}
Last name of the candidate	{lastname}
Last name of the candidate	{lname}
Email address of the candidate	{email}
Communication skills of candidate	{commskills}
Communication skills of candidate	{communication}
Communication skills of candidate	{commskill}
Communication skills of candidate	{comm}
Visa status of candidate	{visastatus}
Security clearance of candidate	{secclearance}
Visa status of candidate	{visa}
Security clearance of candidate	{clearance}
Security clearance of candidate	{security}
Total commercial experience of candidate	{totalcommexp}
Total commercial experience of candidate	{commexp}
Total commercial experience of candidate	{totalexp}
Total commercial experience of candidate	{yce}
Residing state of candidate	{state}
Residing suburb of candidate	{suburb}
Residing country of candidate	{country}

Street address of candidate	{street}
Street address of candidate	{address}
Street address of candidate	{streetaddress}
Residing city of candidate	{city}
Post code of current address	{postcode}
Qualification of candidate	{qualification}
Qualification of candidate	{qual}
Direct phone line number of candidate	{phone}
Mobile phone number of candidate	{mobile}
Fax number of candidate	{fax}
General feedback of candidate	{generalfeedback}
Reason for leaving	{reasonleaving}
Current employer	{currentemployer}
Available or not	{available}
Available date	{dateavailable}
Password	{password}

Employer Merge Fields

Output Needed	Merge Field Required
Name of the employer	{name}
Name of the employer	{clientname}
Name of the employer	{employername }
Name of the employer	{employer }
State for employer location	{state }
Street address for employer location	{street }
Street address for employer location	{streetaddress }
Address for employer location	{address }
Postcode for employer location	{postcode }
Postcode for employer location	{pcode }
Suburb for employer location	{suburb }
City for employer location	{city }
ABN number for employer	{abn }
ACN number for employer	{acn }
Phone number for employer	{phone }
Toll free number for employer	{tollfree }
Fax number for employer	{fax }

Contact Merge fields

Output Needed	Merge Field Required
First name of the contact	{firstname}
First name of the contact	{first}
First name of the contact	{namefirst}
First name of the contact	{fname}
Last name of the contact	{surname}
Last name of the contact	{sname}
Email Address of the contact	{email}
Residing state of contact	{state}
Residing suburb of contact	{suburb}
Residing country of contact	{country}
Qualification of contact	{qualification}
Qualification of contact	{qual}
Direct phone line number of contact	{phone}
Mobile phone number of contact	{mobile}
Fax number of contact	{fax}
Name of the employer	{employer.name}
Name of the employer	{employer.clientname}
Name of the employer	{employer.employername }
Name of the employer	{employer.employer }
State for employer location	{employer.state }
Street address for employer location	{employer.street }
Street address for employer location	{employer.streetaddress }
Address for employer location	{employer.address }
Postcode for employer location	{employer.postcode }
Postcode for employer location	{employer.pcode }

Suburb for employer location	{employer.suburb }
City for employer location	{employer.city }
ABN number for employer	{employer.abn }
ACN number for employer	{employer.acn }
Phone number for employer	{employer.phone }
Toll free number for employer	{employer.tollfree }
Fax number for employer	{employer.fax }
Name of the employer	{client.name}
Name of the employer	{client.clientname}
Name of the employer	{client.employername }
Name of the employer	{client.employer }
State for employer location	{client.state }
Street address for employer location	{client.street }
Street address for employer location	{client.streetaddress }
Address for employer location	{client.address }
Postcode for employer location	{client.postcode }
Postcode for employer location	{client.pcode }
Suburb for employer location	{client.suburb }
City for employer location	{client.city }
ABN number for employer	{client.abn }
ACN number for employer	{client.acn }
Phone number for employer	{client.phone }
Toll free number for employer	{client.tollfree }
Fax number for employer	{client.fax }

Merge field Syntax

All data to be processed by must be placed inside {} brackets within the template or email.

No formatting is allowed to dissect the merge sections; ie – you can't have half a merge section in one colour and the other half in another.

If merge sections aren't working, look at the HTML of the template and check if the merge section is broken up by any HTML statements.

Within brackets are merge statements. These may be;

- Numbers.
- Calculations giving a numerical or string result.
- References to merge fields which will be replaced by the actual data.
- Functions which perform operations on data.
- Control statements which allow repeating of data and conditional display of data.

Merge fields are case insensitive, so these three will be replaced by the same data; {firstname} {FirstName} {FIRSTNAME}

Merge fields will ignore extra spaces, so these three will be replaced by the same data; {firstname} {   firstname} {   firstname   }

Merge fields may also use the 'dot' syntax, if different types of data can be accessed.

For example {job.positiontitle} will be replaced by the position title of the job; {candidate.firstname} will be replaced by the first name of the candidate.

The following are examples of merge fields and what results they will give;

1. Simple numbers;
{5}   will show 5

2. Calculations;
{2+5}   will show 7
{2+5*3}   will show 17 (due the mathematical operator precedence the multiply is done before the addition)

3. Merge fields;
{firstname}   will be replaced by the first name merge field.
{id}   will be replaced by the ID number of the record (eg; if it's a candidate, then it will be the candidates ID)
(id + 5)   will result in the ID number of the record, plus the number 5.

4. Functions
{uppercase(firstname)}   will convert the first name to all upper case and show that; e.g.; if first name is "Bob" it will show "BOB".

5. Control statements;
{if   id > 200} hello {else} goodbye {endif}   will check if id is greater than 200, if so it will show 'hello' otherwise it will show 'goodbye'.

Merge Field Calculations

Calculations can be done in merge fields. These calculations can be of 2 types; numerical and string. For example;

Numerical;

{ 1 + 2 }   produces 3

(4 * 6 + 10 / 2 }   produces 29

String;

("hello" + "joel" }   produces output "hellojoel".

{ firstname + surname }   will replace merge fields and concatenate them; so if firstname is 'bob' and surname is 'smith' then the output will be 'bobsmith'.

Calculations that are numerical respect mathematical order of precedence and bracketing. The following mathematical operators are available;

+   addition as in 1 + 2 = 3

-     minus as in 1 – 2 = 1

*   multiply as in 2 * 2 = 4

/   divide as in 10 / 5 = 2

%   modulus as in 10 % 4 = 2

^   power as in 4 ^ 2 = 16

For string calculations only the addition operator is available.

Merge Field Control Statements

Control statements allow 2 things; to display information based on certain conditions, and to step through lists of similar information. The two statements which reflect these needs are the 'if' statement and the 'repeat' statement.

The 'if' statement allows a condition to be defined and then a section of the template is included. It can have 1 or 2 sections; the 1st version includes the section if the condition is met, the 2nd version has 2 sections of the template; one which will be included if the condition is true, the other if the condition is false. For example;

Version 1;

{if a > 5}

A is greater than 5

{endif}

Version 2;

{if a > 5}

A is greater than 5

{else}

A is not greater than 5

{endif}

The 'repeat' statement repeats through a list of data, for example a list of candidate skills or a list of jobs, allowing a section of the template to be repeated for each specific item. It generally takes 2 forms; a simple numerical repeat, and a repeat based on a list.

Form 1: simple numerical repeat;

{repeat 5}

Hello

{endrepeat}

Will output; Hello Hello Hello Hello Hello.

You can also do simple numerical repeat based on equations and merged data, for example;

{repeat rating}

*

{endrepeat}

Will output; * * *

(Depending on what number rating is – in this case rating would be 3)

Form 2: loop through a list.

If you have a list of something available (for example a list of jobs) you can loop through the list, performing an appropriate action for each item in the list. For example:

{repeat jobs as job}

Title: {job.title}

{endrepeat}

This will loop through the list of jobs which is in the 'jobs' variable, and print out each jobs title. As the loop steps through each job in the 'jobs' list it assign the current job to the variable 'job' - so the reference '{job.title}' inside the repeat loop refers to whatever the current job's title is.

Merge Field Functions

A range of functions are available; functions are like mathematical functions in Microsoft Excel – they take various arguments and produce an output. For example the 'date' function allows formatting of dates and formatting and display of the current date.

Examples;

{date("d/m/Y")}   produces the current date formatted as displayed – if the date was the 3rd of February 2008, this would show; 03/02/2008.

{date("d/m/Y", available)} would show the date referred to as 'available' (whatever that merge field evaluates to), in the above format.

Function reference;

max

Description: Returns the maximum of a list of numbers.

Options:

Takes a list of numbers or merge field data, e.g.;

Max(5,6,rating)

min

Description: Returns the minimum from a list of numbers.

Options:

Takes a list of numbers or merge field data, e.g.

Min(5,6,rating)

abs

Description: Return the absolute value of a number.

Options:

Takes a simple number, e.g.

Abs(-5)

date

Description: Returns the formatted version of a date.

Options:

1. Format string

2. date value (optional – assumes current date)

Format of the options is compatible with PHP's date function details of which can be found here; http://au2.php.net/date

E.g.;

Date("Y-m-d")

Date("Y-m-d", available)

Functions: minutes, hours, days, months, years

Description:

Returns a number for each of these components of the date.

Options:

Takes the date, e.g.

Days(available)

Minutes(available)

Dates are presented in the internal database format, but can be reformatted any way you like.

 So these 4 lines:

{added}

{date("d/m/Y", added)}

{date("d/m/Y H:m", added)}

{date("D/M/Y", added)}

 Will produce these 4 outputs:

2009-10-01 13:53:43

01/10/2009

01/10/2009 13:10

Thu/Oct/2009

Note: the editor may change the quotes "to html special encodings which trips up the data merge system. If you have problems with these, edit the HTML directly and put your quotes in there, removing the code (which will look something like '&quot').

translate

Description: Translates a number into a piece of text.

Options:

1. a number or merge field representing which of the next arguments should be displayed.

2. or more arguments with what will be displayed.

E.g.

Translate(rating, "1 star", "2 stars", "3 stars")

time function

Description: The UNIX timestamp of a date.

Options:

The date, optional – current date is assumed, e.g.;

Time(available)

lowercase

Description: Changes text to lower case.

Options:

The text to change, e.g.;

Lowercase("HELLO");

uppercase

Description: Changes text to upper case.

Options:

The text to change, e.g.

uppercase("hello");

substring

Description: Cuts out a section of the string.

Options:

1. The string.

2. start character zero based.

3. length of characters to grab.

E.g.;

Substring(firstname, 0, 1)   - this will return the first letter of the first name.

Length

Description: Returns the length of the string.

Options:

The string, e.g.;

Length(firstname)

MY SITE

About the My Site add-on

The My Site add-on allows your website to interact with your Perform Zone.

What can a My Site do for me?
- Advertise your jobs on your web site
- Allow candidates to update their job alert and newsletter subscriptions
- Allow candidates to update their availability
- Allow candidates to update their personal details and resume
- SEO your jobs area to increase traffic to your site
- Allow candidates to register into your database without applying for a role
- Direct candidates that apply on your subscribed job boards to your web site
- Funnel all applicants directly into Perform Zone against your job.
- Allow you the option to plug in additional screening pages such as psychometrics, referees, polls etc.
- Integrates with your Perform Zone database so that you don't have to spend extra time managing your own website

How do I get the My Site Add-on?

Call Technical Support on 1300 045 422.
The cost for the My Site is $1500 + GST (once off)

What are the integration options?

Perform Zone supplies three solutions for integrating My Site

1. API
   Your web developer customises you're my Site forms to fit your web sites style guide.
2. Wordpress plugin
   For websites that have been developed in Wordpress. An extra cost $500 applies to this plugin.
3. Iframe
   A single line of code in your webs site that gives you a non-customizable out of the box solution.

About the My Site API

Perform Zone provides a SOAP web service to allow our clients web site developers to integrate with our backend database, providing the most flexibility in terms of data display, input validation, and work flow.
Service calls exist to perform job searches, to retrieve the information about a job, and to

create or update an application, including resume upload. The client's web developers are then free to organize their sites however they wish.

Recommended Web developers
You can use your own Web developers to insert and customize your My Site.
Should you not have one, we recommend www.memyselfandi.com.au as they have previous experience in customizing our sites

How do I set up my My Site API?

Where do I find my web service?
On your server the web service is accessible in the 'ws' sub folder of your main 3hats URL.
So if you access your Perform Zone system using:
http://yourcompany.performzone.com/performzone/

Then your web service would be located at:
http://yourcompany.performzone.com/performzone/ws/server.php

If you go to that link using your own URL you will see a general web service description and list of functions. Not all of these functions are relevant to the web site - they are used by other systems and not covered in this document. They also need to be accessed in a different way.

How do I setup the web service?
Firstly you need to contact Perform Zone technical support - there may be a charge to make the web site section of the web service accessible. Technical support will switch on the web site parts of the service (covered in this document below), and provide you with an 'Access Key'. This key must be sent with every request that goes to the web service to authenticate you as being allowed to access these services.

This key should be kept private, only given to web developers working on your site.

How do I call the web service?
The web service uses the standard SOAP protocol, one of the most common used on the web. This uses XML to transport data in an easily understandable format.

There are many libraries in many programming languages that make it easy to use SOAP - we will provide examples in the PHP language; these should be easy to convert to other languages.

Basically to access the web service you make calls to the services endpoint providing your access key, and any data required by the specific service call. The service will then process this and provide a response with data, or an error code and message. You can then parse this information and display whatever you need to, however you want.

If you are using PHP there is a library called 'nusoap' which makes it very easy to make SOAP web service calls. Here is an example of calling the basic job information web service (GetJobInfo) using PHP and nusoap:

<?

```
// this should point to your nusoap main include file.

require_once('nusoap.php');

$client = new nusoap_client('http://myserver.threehats.com.au/3hats/ws/server.php');

// Call the SOAP method

$result = $client->call('GetJobInfo',

array(

'accesskey' => 'my_access_key',

'JobID' => 48

)

);

// Display the result

print_r($result);

?>
```

The above code, once the correct values have been entered, will return the details of the job with ID of '48' in your Perform Zone system.

Here is the XML the SOAP service sends through from the above code:

```
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/" xmlns:xsd="http://www.w3.org/2001/XMLSchema" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/">

<SOAP-ENV:Body>

<ns2113:GetJobInfo xmlns:ns2113="http://tempuri.org">

<accesskey xsi:type="xsd:string">bx23a</accesskey>

<JobID xsi:type="xsd:int">48</JobID>

</ns2113:GetJobInfo>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>
```

If you are familiar with SOAP messages the above should look pretty clear.

The 'result' returned will be an array of job detail information - for example:

$result['jobtitle'] will be the position title of the job in your Perform Zone system.

Here is the SOAP XML response which comes from the web service:

```
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:SOAP-
ENC="http://schemas.xmlsoap.org/soap/encoding/" xmlns:tns="urn:hellowsdl">

<SOAP-ENV:Body>

<ns1:GetJobInfoResponse xmlns:ns1="http://tempuri.org">

<return xsi:type="tns:jobInfo">

<id xsi:type="xsd:int">48</id>

<jobtitle xsi:type="xsd:string">A test of advertising</jobtitle>

<errorcode xsi:type="xsd:int">0</errorcode>

<error xsi:type="xsd:string"></error>

</return>

</ns1:GetJobInfoResponse>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>
```

Error Responses

Every response the web service returns will have 2 fields; 'error' and 'errorcode'. 'error' is a plain text description of the error that occurred, 'errorcode' is an integer code referring to the error (more detailed explanations of errors can be seen in the appendix of this document).

If no error, then errorcode will equal '0' (zero).

In the above example code if there was no job 48, the response would include:

$result['error'] = "Job with that ID does not exist."

$result['errorcode'] = 110

Example Web Service Calling Code

Click here to get PHP code using the 'Nusoap' library which shows real world working examples of calling these web services. Below are example XML SOAP requests and responses for calling each of the web services functions.

Function: GetJobInfo
Example Request:

```
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"

xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/">

<SOAP-ENV:Body>

<ns4653:GetJobInfo xmlns:ns4653="http://tempuri.org">

<accesskey xsi:type="xsd:string">bx23a</accesskey>

<Jobid xsi:type="xsd:int">48</Jobid>

</ns4653:GetJobInfo>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>
```

Example Response:

```
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:tns="urn:hellowsdl">

<SOAP-ENV:Body>

<ns1:GetJobInfoResponse xmlns:ns1="http://tempuri.org">
```

```xml
<return xsi:type="tns:jobInfo">

<errorcode xsi:type="xsd:int">0</errorcode>

<error xsi:type="xsd:string"></error>

<id xsi:type="xsd:int">48</id>

<jobtitle xsi:type="xsd:string">A test of advertising</jobtitle>

<adverthtml xsi:type="xsd:string">&lt;ul&gt;

&lt;li&gt;

&amp;nbsp;&lt;/li&gt;

&lt;li&gt;

mysite advert&lt;/li&gt;

</adverthtml>

<jobcityarea xsi:type="xsd:string">11</jobcityarea>

<jobstate xsi:type="xsd:string">TAS</jobstate>

<jobsuburb xsi:type="xsd:string">HOBART</jobsuburb>

<jobcountry xsi:type="xsd:string">AU</jobcountry>

<salary xsi:nil="true" xsi:type="xsd:string"/>

<teaser xsi:type="xsd:string">This is a great test job…</teaser>

<worktype xsi:type="xsd:string">permft</worktype>

</return>

</ns1:GetJobInfoResponse>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>
```

Function:SearchJobs

Example Request:

```xml
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/"
```

xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/">

<SOAP-ENV:Body>

<ns2347:SearchJobs xmlns:ns2347="http://tempuri.org">

<searchParams>

<accesskey xsi:type="xsd:string">bx23a</accesskey>

<offset xsi:type="xsd:int">0</offset>

<limit xsi:type="xsd:int">2</limit>

<keyword xsi:type="xsd:string"></keyword>

<status xsi:type="xsd:string">advertised</status>

<country xsi:type="xsd:string"></country>

</searchParams>

</ns2347:SearchJobs>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>

Example Response:

<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:tns="urn:hellowsdl">

<SOAP-ENV:Body>

<ns1:SearchJobsResponse xmlns:ns1="http://tempuri.org">

<return xsi:type="tns:jobArray">

<errorcode xsi:type="xsd:int">0</errorcode>

```xml
<error xsi:type="xsd:string"></error>

<jobs xsi:type="SOAP-ENC:Array" SOAP-ENC:arrayType="tns:job[2]">

<item xsi:type="tns:job">

<id xsi:type="xsd:int">43</id>

<jobtitle xsi:type="xsd:string">Example Job 1</jobtitle>

<jobcountry xsi:type="xsd:string">AU</jobcountry>

<salary xsi:type="xsd:string">$500 to $700 + fun</salary>

<teaser xsi:type="xsd:string">a teaser</teaser>

<worktype xsi:type="xsd:string">contft</worktype>

</item>

<item xsi:type="tns:job">

<id xsi:type="xsd:int">44</id>

<jobtitle xsi:type="xsd:string">Example Job 2</jobtitle>

<jobcountry xsi:type="xsd:string">AU</jobcountry>

<salary xsi:type="xsd:string">ffdf</salary>

<teaser xsi:type="xsd:string">another teaser</teaser>

<worktype xsi:type="xsd:string">contft</worktype>

</item>

</jobs>

</return>

</ns1:SearchJobsResponse>

</SOAP-ENV:Body></SOAP-ENV:Envelope>
```

Function: CreateApplication
Example Request:

```xml
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
```

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/">

<SOAP-ENV:Body>

<ns5060:CreateApplication xmlns:ns5060="http://tempuri.org">

<appDetails>

<accesskey xsi:type="xsd:string">bx23a</accesskey>

<jobid xsi:type="xsd:string">25</jobid>

<candid xsi:type="xsd:int">-1</candid>

<surname xsi:type="xsd:string">Obama</surname>

<firstname xsi:type="xsd:string">Barack</firstname>

<email xsi:type="xsd:string">pres@gov</email>

<mobile xsi:type="xsd:string">012345678</mobile>

<homephone xsi:type="xsd:string">876543210</homephone>

<country xsi:type="xsd:string">AU</country>

<state xsi:type="xsd:string">Vic</state>

<password xsi:type="xsd:string">captain</password>

<suburb xsi:type="xsd:string">Melbourne</suburb>

<resumedata xsi:type="xsd:string">(base 64 encoded resume data)</resumedata>

<resumename xsi:type="xsd:string"><![CDATA[mycv.doc]]></resumename>

</appDetails>

</ns5060:CreateApplication>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>

Example Response:

<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"

```xml
xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:tns="urn:hellowsdl">

<SOAP-ENV:Body>

<ns1:CreateApplicationResponse xmlns:ns1="http://tempuri.org">

<return xsi:type="tns:appInfo">

<appid xsi:type="xsd:int">2</appid>

<candid xsi:type="xsd:int">2</candid>

<errorcode xsi:type="xsd:int">0</errorcode>

<error xsi:type="xsd:string"></error>

</return>

</ns1:CreateApplicationResponse>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>
```

Function: UpdateApplication
Example Request:

```xml
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope

SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/" xmlns:SOAP-
ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/">

<SOAP-ENV:Body>

<ns5263:UpdateApplication xmlns:ns5263="http://tempuri.org">

<appDetails>

<accesskey xsi:type="xsd:string">bx23a</accesskey>

<appid xsi:type="xsd:string">1</appid>
```

```xml
<surname xsi:type="xsd:string">lastnamechange</surname>

<firstname xsi:type="xsd:string">namechange1</firstname>

<email xsi:type="xsd:string">newemailchange@com</email>

<mobile xsi:type="xsd:string">111111111</mobile>

<homephone xsi:type="xsd:string">22222222222</homephone>

<country xsi:type="xsd:string">NZ</country>

<state xsi:type="xsd:string">NSW</state>

<password xsi:type="xsd:string">major</password>

<suburb xsi:type="xsd:string">Toormina</suburb>

<resumedata xsi:type="xsd:string">(base 64 encoded resume data)</resumedata>

<resumename xsi:type="xsd:string">my new resume.doc</resumename>

</appDetails>

</ns5263:UpdateApplication>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>
```

Example Response:

```xml
<?xml version="1.0" encoding="ISO-8859-1"?>

<SOAP-ENV:Envelope SOAP-ENV:encodingStyle="http://schemas.xmlsoap.org/soap/encoding/"

xmlns:SOAP-ENV="http://schemas.xmlsoap.org/soap/envelope/"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"

xmlns:SOAP-ENC="http://schemas.xmlsoap.org/soap/encoding/"
xmlns:tns="urn:hellowsdl">

<SOAP-ENV:Body>

<ns1:UpdateApplicationResponse xmlns:ns1="http://tempuri.org">

<return xsi:type="tns:appInfo">

<appid xsi:type="xsd:int">1</appid>

<candid xsi:type="xsd:int">1</candid>

<errorcode xsi:type="xsd:int">0</errorcode>
```

```
<error xsi:type="xsd:string"></error>

</return>

</ns1:UpdateApplicationResponse>

</SOAP-ENV:Body>

</SOAP-ENV:Envelope>
```

Can I alter the web application page to request that candidates can enter their own referee's details?
Yes, contact support for a quote

API Functions

Function Name	Parameters	Description
GetJobInfo	accesskey - string access key provided by PZ technical support. jobID - integer ID of job in PZ system.	This returns the detailed information about a single job - for example the title, advert HTML code, location etc.
SearchJobs	Accesskey - string access key provided by PZ technical support.	Search parameters - various parameters to search on - elaborated further in below this summary table. This returns a list of jobs based on the requested search parameters, or returns all jobs in your PZ system, if no parameters are sent through.
CreateApplication	Accesskey - string access key provided by PZ technical support. jobID - integer ID of job in PZ system.	Email address of candidate ID - used to uniquely identify a candidate in the system. Fields used to create this application, more information below. This attempts to create a new application for a job, combining candidate information and a job ID. If a candidate with matching email address doesn't already exist in the system, the web service will create them.
UpdateApplication	Accesskey - string access key provided by	Fields used to update this application, more information below. This updates the details

	PZ technical support. Application ID - used to uniquely identify the application to update.	of an application - it is used in multi page application processes.
GetFieldList	No input parameters	Any web services that take field/subfield values operate on codes only, not on labels (the text that usually shows in Perform Zone) - since your field list is customizable in settings, it may be required that your web site regularly gets updates of your Perform Zone field list, to keep your website in sync with your Perform Zone.

Functions Specifications

Function: GetJobInfo

Description: A job ID from the PZ system is sent to the web service, and the web service sends a data set back with a set of information about the job from within the PZ database.

Calling Parameters:

Field	Description	Type	Example
accesskey	Key given to you by technical support to allow you to authenticate with the web service system.	string	Shjgdfkdj353
jobid	ID of the job within the database whose details to return.	int	25

Returned Data:

Field	Description	Type	Example
errorcode	Number of the error - see appendix for full list and description.	int	111
error	Text description of error.	String	Internal server error.
id	The job ID in PZ.	int	25

jobtitle	The position title.	String	My Job
adverthtml	The HTML for the MySite job created in the system.	String	This is job description with html tags.
jobcityarea	A code referring to the city area list in the MySite details.	String	1
jobstate	A code for the state the job is in.	String	Vic
jobsuburb	Suburb of job	String	Melbourne
jobcountry	2 letter ISO code for the country of this job.	String	AU
salary	The text salary field entered in MySite	String	$40K+bonus
teaser	The web teaser for MySite.	String	Here is a little summary to make you want the job
worktype	A code for the type of work this job is.	String	permft
field	The field code form your database, this job is set to. (the 'field' setting in MySite job board information)	String	23
subfield	The specialisation for the above field, set in MySite job board information.	String	5

Function: SearchJobs

Description: A set of search parameters relating to fields in the PZ system is sent to the web service, and the web service sends an array data set back with a summary set of information about each job matching the search within the PZ database.

Calling Parameters: There is one structure called 'searchParams' which includes at least the first 3 of the following list of tags (the actual search parameters like keyword, status etc are optional):

Field	Description	Type	Example

accesskey	Key given to you by technical support to allow you to authenticate with the web service system.	string	Shjgdfkdj353
offset	Offset and limit work the same as an SQL query - if 25 jobs are available and offset=10 and limit=5, then the result array will start from the 10th job and return 5 jobs.	int	10
limit	See above	int	5
Status	The status to search on - 'all' returns all jobs regardless of advertising status. 'Advertised' is the default and only returns jobs whose MySite is setup.	string	Advertised
country	The jobs country as a 2 letter ISO code.	String	AU
keyword	A string keyword to search job information on.	String	manager

Returned Data:

Field	Description	Type	Example
errorcode	Number of the error - see appendix for full list and description.	int	111
error	Text description of error.	String	Internal server error.
jobs	Array of tns:job structures with basic summary info of each job returned from the web service. For this structure see below.	array	See below.

The job structure: (all fields are lower case)

Field	Description	Type	Example
id	ID of the job	Int	25
jobtitle	Position title of the job	String	My new job

jobcountry	Country the job is located in - represented in standard 2 letter ISO code.	String	AU
salary	Display salary of the job	String	$25K+bonus
teaser	Teaser about the job	String	This is a very interesting job...
Worktype	Code for what type of work the job is (see appendix for codes)	string	Permft

Function: CreateApplication

Description: This call attempts to create a brand new application linking a candidate in the system, with a job. Each candidate can only apply for each job once. There are 2 options for uniquely identifying candidate in the database - candidate ID or email address. If candidate ID is not equal to -1, this ID is used as the candidate in the database. If it is -1, then the email address is searched for in the database, and the first matching candidate is used (even if they have been deleted or archived).

Calling Parameters:

Field	Description	Type	Example
accesskey	Key given to you by technical support to allow you to authenticate with the web service system.	string	Shjgdfkdj353
jobid	ID of the job within the database to create an application for.	int	25
candid	ID of the candidate this job is for. If candidate ID is set to -1, the system will attempt to search for a current candidate using the email address provided. If none is found it will create a new candidate for this application.	int	551
email	An email address for the applicant.	string	Boss@pz.com

firstname	The first name of the applicant.	string	bob
surname	The last name of the applicant.	String	smith
resumedata	The resume binary in base64 encoded format.	String	(base64 encoding)
resumename	The file name of the resume uploaded to the web site.	String	Myresume.doc
coverdata	The cover letter in base64 encoded format.	String	(base64 encoding)
covername	The file name of the cover letter uploaded to the web site.	String	MyCoverLetter.doc
mobile	Mobile phone number	String	0408000000
homephone	Home phone number	String	12345678
country	2 letter ISO standard country code of this candidate	String	AU
state	3 letter state code - see appendix for Perform Zone's state codes.	String	Vic
password	The candidates password - for if you have a candidate login system on your My Site.	String	hellopassword
workphone	Work contact phone number	String	87654321
visastatus	Code for the Visa status of this candidate. The appendix shows all valid codes.	String	auscit
secclearance	Code for the security clearance level of this candidate. The appendix shows all valid codes.	String	restricted

idealrole	Text the candidate has entered describing their ideal role. This text will be added to the text previously entered into your database.	String	Looking for role where I can move up.
optin	The marketing email opt in status. This relates to the candidate marketing information opt in/opt out in the interface. no = opt out, yes = opt in.	String	yes
newsletter	Relates to the 'wants newsletter' (yes or no) option in the interface. Which allows you to send a marketing newsletter to any candidates that would like it.	String	yes
source	The internal code for the source this application has come from. Appendix has a list of the common codes, but specific codes can be setup for each of our clients, so your list may vary form the standard one.	int	1
suburb	Suburb this candidate is from	String	Melbourne
street	Street address for this candidate	String	230 Church St
yeargrad	This is the year the applicant graduated from their highest qualification. It is available as a merge field for documents.	Int	2010
qualification	This is a text description of the candidate's highest qualification.	String	MBA
appstatue	This allows you to set the applications status on creation or on update. Currently only the 'reject' status is supported - allowing you to reject an	String	reject

	application automatically in the system. This is useful if you want to record the application in Perform Zone, but want to reject it automatically as the applicant's answers don't meet the minimum requirements of the job; ie - country must be 'Australia' for example.		
jobalertfield	The next 3 fields are for composite job alerts. This is for creating a set of job alerts mixing several field settings at once. So if candidate wants alerts for Australia and New Zealand and for anything in IT, you can set the 'jobalertfield' to your code for 'IT', and list 2 countries in 'jobalertlocation' and the web service will create 2 alerts for that candidate - one for IT jobs in Australia, the other for IT jobs in New Zealand. Field formats are "Field:SubField|Field:SubField" so you can send a list of field/subfield codes through at once - codes must not have colons (:) or pipes (|) in them. It is important to note that codes are sent through, not the descriptive text you see in the Perform Zone interface. Codes can sometimes be text (not necessarily numbers).	String	24:3|35:4|IT:Programmer
jobalertlocation	See 'jobalertfield' for general description. Location is expressed in a list of country:state, or country by itself. Different country:state or country values are separated by a pipe (|). Countries are 2 letter standard ISO codes.	String	AU:NSW|AU:SA|NZ

	states for Australia are defined in appendix. States for other countries may be provided on request.		
jobalertworktype	See 'jobalertfield' for general description. Can be 'perm', 'contract' or 'perm:contract'.	String	perm
sendconfirm	Whether the system should send out a standard application confirmation email. This email can be setup from within settings on a client's Perform Zone. This will send out this email in the standard way, recording a comment to the database, and logging information. It also allows merge fields. Clients are free to not use this system, however, and create their own confirmation emails from their server directly. The benefit of this may be greater control over the emails contents - for example you may want to embed images or attach a document, neither of which 3hats can do with the standard confirmation letter.	String	yes
skills	An array of the skill structure defining a list of skills to be added to candidates. These are often used in relation to job skills entered in the job description section of Perform Zone - so they match the desired skills of the job. See the candidate skills structure table below this one to get a definition of each skills structure.	Array	(see skills structure table below)
jobalerts	An array of the job alert structure, defining what type of jobs the candidate wants to receive an automated job alert email about.	Array	(see job alerts structure table below)

	(these must be setup within the Perform Zone system - see the manual or contact support)		
poll	A structure defining the answer to a poll question. This is a client specific extension and not generally available to clients at this stage.		

Skills structure:

Field	Description	Type	Example
skill	Text short description of the skill.	String	.Net
comment	The candidate's description of their skills.	String	Have worked on web sites using C#.
yearsexp	Total years commercial experience the candidate claims to have.	Int	5
qualification	The candidate's qualification level in this field, if necessary.	String	B Sc.
yesno	For skills which require a yes or no answer - for example 'do you have a driver's license?'.	String	yes

Job Alerts structure:

Field	Description	Type	Example
field	The code of the field of jobs the candidate is searching for.	String	12
subfield	The code of the specialisation of jobs the candidate is searching for.	String	4
worktype	The type of work they are looking for - either 'contract', or 'perm' for permanent work.	String	perm

Field	Description	Type	Example
state	The state code for the jobs they are looking for. See appendix for Australian state codes.	String	NSW
country	The 2 letter ISO country code for the country the jobs they are looking for are in.	String	AU

Returned Data:

Field	Description	Type	Example
errorcode	Number of the error - see appendix for full list and description.	int	111
error	Text description of error.	String	Internal server error.
appid	The internal application table primary key ID from your database. Will be unique for each application created.	int	5234
candid	The internal candidate table primary key ID from your database. Will be unique for each candidate created.	int	3245

Function: UpdateApplication

Description: This call is essentially the same as CreateApplication above, except it takes an application ID (which is returned by CreateApplication) and doesn't take a candidate ID or a job ID - where these are needed it gets them from the already created application record. It updates the data in the application - all the same fields as in CreateApplication are available for updating. It is used for creating multi page applications (this is where the web site application process is broken into several web pages).

Calling Parameters:

Field	Description	Type	Example
accesskey	Key given to you by technical support to allow you to authenticate with the web service system.	string	Shjgdfkdj353
appid	ID of the application within the database whose details to update.	int	300

Returned Data:

Field	Description	Type	Example
errorcode	Number of the error - see appendix for full list and description.	int	111
error	Text description of error.	String	Internal server error.

Function: GetFieldList

Description: Any web services that take field/subfield values operate on codes only, not on labels (the text that usually shows in Perform Zone) - since your field list is customizable in settings, it may be required that your web site regularly gets updates of your Perform Zone field list, to keep your website in sync with your Perform Zone.

The GetFieldList service call gets an array of arrays of your current field/subfield list.

Calling Parameters:

No calling parameters are required.

Returned Data:

Field	Description	Type	Example
field	Text description of the field.	String	Mining
code	code referring to the field.	String	Mng
subfield	An array of all subfields in this field.	Array	Array

Subfield array structure:

Field	Description	Type	Example
subfield	Text description of the subfield.	String	Coal
code	code referring to the subfield.	String	123

How do I style the candidate page (cand.php)?

The candidate page allows candidates who have been registered with your site to login and change their details themselves - change contact information and update resumes for example.

It uses the template 'cand.tpl', so the default template for this gives examples showing how this page works.

How do I style the jobs list page(jobs.php)?

The jobs list page does a search of all your available jobs using search parameters sent via HTML variables, and gives the page a list of active jobs with basic details about those jobs. It uses the 'jobs.tpl' for its template.

Checkout the default 'jobs.tpl' for details on the variables available for the job information you can display.

Check the default page 'jobsearch.tpl' for details about sending the search variables. Below are how to setup the search variable select lists.

Searching on Country

To create a country selection list which allows the user to search on the country of a job, use the following Smarty template code.

```
<select class="searchSelect" name="searchcountry" id="searchcountry"
onchange="getLocationList('searchlocation', 'searchcountry')">

    {foreach key=key item=item from=$countryListVals}
       {if $item == $jobSearchCountry}
        <option label="{$countryList[$key]}" value="{$item}"
selected>{$countryList[$key]}</option>
        {else}
        <option label="{$countryList[$key]}"
value="{$item}">{$countryList[$key]}</option>
        {/if}
     {/foreach}

    </select>
```

Please Note:

The 'onchange' handler is optional - you must include the javascript file 'js/comms.js' in your page if you want to use it. It uses AJAX to fetch a list of states for the chosen country and sets this list in the select control named 'searchlocation' (which you must add in also).

The 'name' must be 'searchcountry' - this is what the code behind the page uses when it does its country search.

Searching on Active Country

There is a second country list that can be used to seed the country search - this is the 'active' country list. Only the countries that have currently active jobs with adverts assigned to them will be shown in this list.

To create a country selection list which allows the user to search on the country of a job, use the following Smarty template code.

```
<select class="searchSelect" name="searchcountry" id="searchcountry"
onchange="getLocationList('searchlocation', 'searchcountry')">

    {foreach key=key item=item from=$activeCountryListVals}
      {if $item == $jobSearchCountry}
      <option label="{$activeCountryList[$key]}" value="{$item}"
selected>{$activeCountryList[$key]}</option>
        {else}
        <option label="{$activeCountryList[$key]}"
value="{$item}">{$activeCountryList[$key]}</option>
        {/if}
      {/foreach}

    </select>
```

Please Note:

The 'onchange' handler is optional - you must include the javascript file 'js/comms.js' in your page if you want to use it. It uses AJAX to fetch a list of states for the chosen country and sets this list in the select control named 'searchlocation' (which you must add in also).

The 'name' must be 'searchcountry' - this is what the code behind the page uses when it does its country search.

Searching on State

To search on state, we should already have the country list. Perform Zone has a partial list of all states connected to their countries and can use AJAX to fetch them. Use the country search above with this code below to achieve a state search:

```
<select class="searchSelect" name="searchlocation" id="searchlocation">

    {foreach key=key item=item from=$locationListVals}
      {if $item == $jobSearchLocation}
      <option label="{$locationList[$key]}" value="{$item}"
selected>{$locationList[$key]}</option>
        {else}
        <option label="{$locationList[$key]}"
value="{$item}">{$locationList[$key]}</option>
        {/if}
      {/foreach}
```

```
        </select>
```

Searching on Region

You can also search on the region in the world a job is in. Perform Zone has a list of regions and countries connected with those regions. It can use AJAX to fetch the countries associated with a region - to do this use the code below:

```
        <select class="searchSelect" name="searchregion" id="searchregion"
onchange="getCountryList('searchregion', 'searchcountry', 'searchstate', 'searchlocation')">

        {foreach key=key item=item from=$regionListVals}
          {if $item == $jobSearchRegion}
            <option label="{$regionList[$key]}" value="{$item}"
selected>{$regionList[$key]}</option>
            {else}
            <option label="{$regionList[$key]}"
value="{$item}">{$regionList[$key]}</option>
            {/if}
        {/foreach}

        </select>
```

Please Note:

The 'onchange' handler is optional - it triggers an AJAX call which gets a list of all countries for the selected region. You must include 'js/comms.js' in your page for this to work.

Searching on Employer Industry

The search shows jobs based on industry of employer posting that job. Use the following code to do this:

```
 <select class="searchSelect" name="clientindustries" id="clientindustries" >
   <option value="" label="Any">Any</option>
   {foreach key=key item=item from=$clientIndustryListVals}
      {if strtolower($item) == strtolower($clientindustries)}
         <option label="{$clientIndustryList[$key]}" value="{$item}"
selected>{$clientIndustryList[$key]}</option>
         {else}
         <option label="{$clientIndustryList[$key]}"
value="{$item}">{$clientIndustryList[$key]}</option>
         {/if}
   {/foreach}

</select>
```

Search on Job Field

This search shows jobs based on what Field the Job is in.
Use the following code for this:

```
<select class="searchSelect" name="searchindustry" id="searchindustry"
onchange="getJobTypeList('searchindustry', 'searchjobtype')">

   {foreach key=key item=item from=$industryListVals}
     {if strtolower($item) == strtolower($jobSearchIndustry)}
       <option label="{$industryList[$key]}" value="{$item}"
selected>{$industryList[$key]}</option>
     {else}
       <option label="{$industryList[$key]}" value="{$item}">{$industryList[$key]}</option>
     {/if}
   {/foreach}

</select>
```

Search on Job Field & Job Field Specialisation

This search allows the jobseeker to drill down on Job Field Specialisation after selecting the Job Field.
Use the following code for this:

```
<select class="searchSelect" name="searchjobtype" id="searchjobtype">

   {foreach key=key item=item from=$functionListVals}
     {if strtolower($item) == strtolower($jobSearchJobType)}
       <option label="{$functionList[$key]}" value="{$item}"
selected>{$functionList[$key]}</option>
     {else}
       <option label="{$functionList[$key]}" value="{$item}">{$functionList[$key]}</option>
     {/if}
   {/foreach}

</select>
```

new job type

```
<select class="searchSelect" name="searchjobtype" id="searchjobtype">
</select>
```

Search on Work Type

This search searches on the jobs work type - 'full time', 'part time' etc. Use the following code to do this search:

```
<select class="searchSelect" name="searchworktype" id="searchworktype">

   {foreach key=key item=item from=$worktypeListVals}
     {if $item == $jobSearchWorkType}
```

```
        <option label="{$worktypeList[$key]}" value="{$item}"
selected>{$worktypeList[$key]}</option>
        {else}
        <option label="{$worktypeList[$key]}"
value="{$item}">{$worktypeList[$key]}</option>
        {/if}
    {/foreach}

    </select>
```

Adding a 'Hot Jobs' feature

Sometimes you will want to display on the top few jobs, maybe of a particular priority. You can create a special jobs list page using the 'page' parameter and reference it in an iframe. For example:

<iframe src="jobs.php?page=hotjobs" />

Then in jobs.tpl you will use an 'if' statement to provide 2 alternative jobs list pages:

{if $page=="hotjobs"}

Contents to show for hot jobs list.

{else}

Normal jobs page contents

{/if}

You can put default search parameters in the iframe source parameters to define the jobs to be displayed:

<iframe src="jobs.php?page=hotjobs&searchpriority=1&&searchoffset=0&searchlimit=2&jobsearch =1" />

searchpriority means only show jobs with priority = 1 (this is set in the job details in Perform Zone).

searchoffset means start at the first job (job = 0) in the list of jobs that the search produces - ie; start with the most recently added job.

searchlimit says how many jobs to display in the search = 2 in this example meaning display top 2 jobs.

jobsearch = 1 tells the system to actually perform the search.

How do I Style the application page (app.php)?

The application page processes an application for a job. Usually the jobs list page has links to the application page of that job - external job boards will also have a link to the application

page, and also a special variable to identify which job board the application has come from - so you can track advertising effectiveness.

The application page uses the template 'app.tpl' - the default template has examples of all the features available.

The app page is given Smarty variables with all the job details, as well as the standard candidate login information that all pages get.

It also gets info about skills requested for this job, so you can display input boxes for the applicant to enter details of these skills.

Inputs Available In This Page

See the default 'app.tpl' for an example, but basically you need to setup a form, and use some hidden variables for the job number and an 'apply' indicator, to tell the system this is an application it needs to process. Then the fields you ask the applicant for within the form can be any of the following:

- Email (Mandatory)
- First Name (Mandatory)
- Last Name (Mandatory)
- Contact Phone
- Mobile Phone
- Secondary Email
- Current Industry
- Current Job Function
- Current Position Title
- Country
- Resume Upload
- Requested Skills
- Job Alerts (applicant can request for alerts to be sent for new jobs similar to this one)

How do I style the candidate registration page (reg.php)?
The candidate registration page allows candidates to register their details.
It uses the template 'reg.tpl' - check the default version for information on how this page works.

About the My Site iframe

If you don't have the My Site, Candidates can apply to your job via a standalone Perform Zone application page.
Once they have completed their application, the page closes down.

The format of the URL for the standalone page is:

****.performzone.com/app.php?jref=1818

The "****" is replaced by your companies PZ name.

Your job reference number (jref) is the last four numbers (in the example above this is 1818).
You will need to change this to your Perform Zone job reference number.
Candidates who use this link will have their Source in Perform Zone set as "Website"

Allowing candidates to register into your database from your website.

There are two ways:

1. Ask them on your web site to send you an email. Once in your inbox you can use Perform Zone's Outlook Plug-ins. Candidates who use this method will have their source shown in Perform Zone as the name of the recruiter that registered them in using the outlook plug-in.

2. Direct them to ****.performzone.com /reg.php, where you replace "****.performzone.com" with your Perform Zone URL of the same form.
Candidates who use this link will have their Source in Perform Zone set as "Website".
This page won't allow styling.

About the My Site Wordpress plugin

My Site can be interfaced to any wordpress site with the use of a plugin that adds the ability to

- List currently available Jobs
- Apply to a listed job
- Register as a candidate

The plugin automatically updates your Perform Zone software with candidate details, resumes and application documents

How do I install the My Site wordpress plugin?

Import pzplugin.zip into your site thru the wordpress admin page.
Once the plugin is imported, activate it.

Usage
Currently the plugin has 3 available views for your website. With simple shortcodes you can add these options to any wordpress website.

To add a view into your website you only need to add the short code into the page in wish you wish to display a view. This can be a standalone page or ie a page linked to the wordpress menu for "Job Search" or inserted into an existing page at any point.
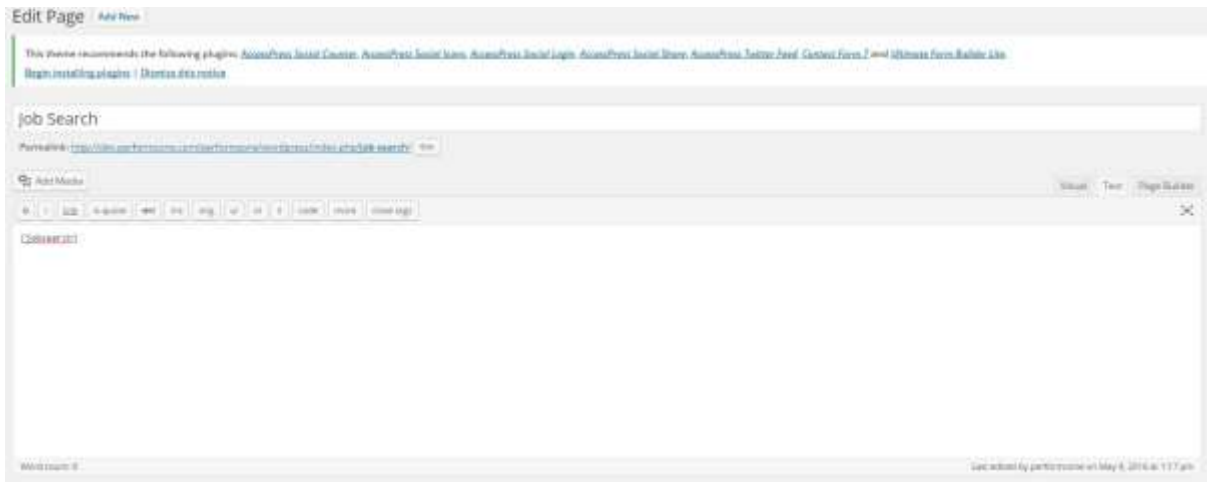
In wordpress login as administrator, select a page to edit or create a new page and type in the shortcode as shown in the image above. Save and publish the page and you have now added a job search feature to your website that displays currently active jobs.

There is no need to worry about candidate application page as this is automatically called when a candidate selects a job from the jobsearch listing.

Modifying the Plugin

When a wordpress theme is fully compliant with wordpress standards the plugin will use colours from that theme. If not some minor modifications may be required to the code of the plugin. This is quite simple and in most cases your website admin should have no trouble with these adjustments.

You can alter the behaviour of the plugin through the edit plugin options within Wordpress. This includes hiding and showing fields as well as making fields mandatory.

Updates to the Plugin

Over time we will occasionally add features to the plugin these updates will be automatically available through the wordpress plugin manager.
Any modifications to the plugin will be overwritten when you install a plugin update.

Register as a Candidate
Short code [register]

Register

First name:*	
Surname:*	
Email:*	
Alternate email :	
Choose password:*	
Re-enter password:*	
Contact number:*	
Mobile number:	
Country:*	Select... ▼
State:	Select.. ▼
City:*	
Postcode:	
Visa status:	Select a visa status... ▼
Upload CV:*	Choose File No file chosen
Current industry:*	Any ▼
Current function:*	Any ▼
Current position title:*	
	☑ I want to receive emails about available jobs
	Create Account

Search for Jobs
Short code [jobsearch]

Narrow the search to jobs thru an incremental search filter which will match the search criteria in any part of a jobs description.

Apply For a Job

No shortcode as this view is automatically displayed when a job is selected in the job search view.

Mapping My Site / Job Function fields

You can map your My Site field and Specialisations to Perform Zone's Category and Sub-Category fields. This allows you to speed up your advert posting.
When you create a job, one of the mandatory fields is the Perform Zone Category fields. These are used to your advert on Perform Zone's job board. If you map these to your My Site Fields it will pre-populate your My Site Field and Specialisation fields when you create an advert. All you'll have to do then is press POST after you've created your advert content. Handy yes, but also improves your advertisement accuracy when you've got new staff.

To map My Site fields

1. Go to SETTINGS, select the LISTS tab and then choose Job List from the Drop Down Lists.
2. Select EXPORT from the ACTION button.
   This will down load an excel sheet for you to edit.
3. Enter your My Site Field and Specialisation against each Perform Zone sub category.
   If you have Fields and Specialisations that don't match any sub-categories, enter them in the My Site Column next to empty Perform Zone rows. They wont map, but it will save you time entering them this way.
   Don't edit any of the Perform Zone columns
4. Save your edited file and upload it back into Perform Zone by pressing IMPORT in the ACTION button.

To restore your previous mapping press the RESTORE button.

Other options exist when you double left mouse click on a Specialisation from within your Job Function list in settings. This will allow you create a single NEW My Site specialisation and map it, MERGE it with another specialisation, or EDIT its label, or DELETE it.

JOB READY POOL

About Job Ready Pools

Job Ready is add-on that you can purchase.

Job ready pools are an efficient way to pre-screen candidates for potential jobs in the future, allowing you to respond fast to a requirement.

It is useful when you have clients giving you a high volume of similar jobs.

How does the job ready pool tool work?

1. Create a job that you want to pool candidates for a future need in the future.
   In the Reference field, type in the word "pool"
2. When assigning skills to the job, save the skill as a "Job ready" skill
3. Set up your Gun Alert and assign Candidates from your database to your pool job
4. As your recruiters screen these candidates, Candidates that meet your Pool job's job ready skills are moved automatically to shortlisted.
5. When an actual job comes in, clone the pool job and move your shortlisted job ready candidates to that job. Now you have a pre-screened current list against your job.

How do I make a Job a Pool Job?

Enter the word "pool" into your jobs reference field.

How do I make a Job Ready Skills?

In job details, double left mouse click in the skills area, press ADD and add your skill. When adding, change the skill priority to "Job Ready".

If you are using the check box method of adding skills (fixed library), add the skill first, then double left mouse click on the skill in the skills table and press open.
Change the priority to job ready.

Job ready can be set as the default status for a skill with SETTINGS.

1. To do this, go to SETTINGS, select the LISTS tab.
2. From within the Drop Down Lists, select "Skill Autocomplete List"
3. Select your skills from the right hand side table and alter its priority to Job Ready.
4. Press SAVE.

What happens if a job ready skill expires?

Job ready skills can have a date associated to them.
This represents that date that the skill or licence expires.
If a candidate's job ready skill later expires, the candidate drops back to either Applied or Database.

Color coding rules for job ready candidates

The rules are:

- Green if you have all job ready skills + references
- Red if you have references but not all job ready skills
- Yellow if you have no references but all job ready skills
- No color if you don't have both references and all job ready skills

These can be customised in your SETTINGS by Perform Zone's support staff.

Why don't my job ready candidates don't appear with the right color coding?

Expected green or yellow

- It could be that you have a job ready skill with an expiry date.
  Although the candidate had the skill, it has now expired or there is no date.
  This means that they have a YES for the skill but it's out of date.

KONEKTIVA API

What candidate data is transferred from Konektiva when I create a new Case?

Once you have created your candidate within Konektiva, Konektiva will then transfer the following data to Perform Zone:

- Case ID
- Referral ID
- Consultant
- Candidate Given name
- Candidate Last name
- Candidate Home
- Candidate Mobile
- Candidate Address (street)
- Candidate Address (suburb)
- Candidate Address (postcode)

To see this data, locate your Candidate by searching within the Candidates tab.

How do I see the Candidate comments added from Konektiva?

1. Add your comments on the candidate from within Konektiva. Konektiva passes the comment data into the candidates file.
2. Open your candidates profile from within Perform Zone.
3. Select the Comments tab.
4. Highlight a comment within the comments list.

How do I record a placement from Reverse Marketing into Konektiva?

1. Move your Employer to the Placed stage
2. Complete the Placement Detail section from within the Reverse Marketing Module.
3. Press the "Send to Konektiva" button

EMAIL

How do I save an email into Perform Zone?

Perform Zone provides three email Add-on s that will allow you to save content from any email into your Perform Zone database.

1. The Email Forwarder, which is $90 and compatible with all email software.
2. The Standard Outlook Plug-in is free, unsupported and compatible with Office 2007
3. The Advanced Outlook Plug-in is free, unsupported and is compatible with Outlook 2007 and 2010.

About the Email forwarder Add On

The Email Forwarder Add On allows you to save all the emails that you send and receive from any 3rd party email software (such as outlook, google mail, lotus notes etc.) into Perform Zone.

The price is $90 and can be used by all of your staff.

You set the rule in your email software to CC your sent and received emails to a Perform Zone address that we'll provide you with.

Emails that you CC are added into your Perform Zone database.
They are matched to your existing candidates and contacts via their email address.

Return SMS's are also added into your existing candidate and contacts notes.

If they are not already in your database, you will see a NEW PERSON alert appear in the bottom left hand corner of your Perform Zone.
Clicking on that alert will open a pop up that allows you to assign then as a contact or a candidate, or ignore them.
New people emailing you from Gmail, Hotmail, Bigpond and Indeed are automatically created as Candidates.
This saves you opening up the New Person pop up an adding them in.

Internal emails are ignored by the Email Forwarder.
This prevents a trail of emails between staff members being recorded.

Contact Perform Zone support to have the Email Forwarder Add On activated.

How do I set outlook rules to work with the Email Forwarder add-on?

Received Emails

The best way is to set the rules up on your Microsoft email exchange (server side). See your IT Admin person for this. This allows emails to be saved into Perform Zone whilst your outlook is off.

The next best way is to set your rule within your Outlook (client side).

The rule is:

Check messages when they arrive
forward it to people or distribution list

This link may help:
https://support.office.com/en-ca/article/Automatically-forward-my-messages-to-another-e-mail-account-9f124e4a-749e-4288-a266-2d009686b403

Sending emails

The best way is to set within your Outlook.

The rule is:

Check messages after sending
Cc the message to people or distribution list

This link may help:
https://support.office.com/en-ie/article/Automatically-send-someone-a-copy-of-messages-that-you-send-0e8e32e9-777f-49fc-878f-41ed7c58677a

Why does the email forwarder only work on CC and not the TO field?

When you CC the email to us, we get to see who the email is intended to be sent to in the TO field. This allows us to save the email content to the right person.

If you just forward a received email using the TO field, we don't know who to assign it to.

Using google mail with the email forwarder

In your Google mail you can set up a rule to forward emails via the Email Forwarder. Advise us once you've done this by sending an email to Support@performzone.com. We need to accept your request by confirming with Google.

I'm getting different candidate resumes saved to one profile

The Email Forwarder plugin saves attachments to the profile of the candidate or employer by matching their email address.

If this is an issue (say a recruiters emailing you multiple applicants):
Delete the email address from their Perform Zone profile. When a new email appears, add the Candidates name via the New Person pop up in Perform Zone.

NB: we are developing a website wherein recruiters can upload their applicants and you get them assigned straight into your job.

Standard Outlook Plug-in

Please note this plugin is not supported by Perform Zone's help desk or developers.
The plugin will disable if your outlook crashes and is compatible only with Outlook 2007.

With one click you will be able to add the details of a candidate (First name, last name, email address, resume) who has emailed you their resume and upload it into Perform Zone automatically.

The system will search for the candidates email address in your database - if found it will update that candidate, adding any attachments that came with the email, and putting in a comment with the emails body and subject heading. (It will not duplicate the candidate)

If no matching candidate is found, it will add a new candidate profile to your database.

To do this it will use email address, first name and surname from the display name of the email, add the contents of the email and add any documents attached to the email to the new candidate profile.

How do I install the Standard Outlook Plug-in?
The Perform Zone Standard Outlook plugin only works with Outlook 2007.
For 2010, use the Advanced Outlook Plugin.

1. Download the installation file from this link:
   http://try.performzone.com/plugins/3Hats.zip
2. Close your Outlook.
3. Extract the contents of the zip file to the desktop (if not sure how try using WinRar or Winzip)
4. Run the vstor.exe and complete the installation Wizard.
5. Run the setup.exe and complete the installation Wizard.
6. Open Outlook.
7. Press the padlock icon that appears in your Outlook toolbar and update your details.

The URL is the web address that you use to log into Perform Zone.
The user name and password are your user login details for Perform Zone.

Advanced Outlook Plug-in

Please note this plugin is not supported by Perform Zone's help desk or developers.
The plugin will disable if your outlook crashes and is compatible only with Outlook 2010 and 2008.

The features of the advanced plug-in are:

- Auto-saving of your candidate and employer emails into Perform Zone
- Unsubscribe facility
- Add new employer contacts into Perform Zone
- Add more data on new candidates into Perform Zone

Auto-saving

If their email exists in your database, they will have the contents of their emails saved into your database automatically. You can still see the email in outlook. It will be tagged with a Flag in Outlook so that you know it has been saved into Perform Zone.

Add Employer Contact

When an email is received from a client contact that is not in your database:

- You will be able to see that they are not in your database.
- You press "add contact". A pop up appears that allows you to check their data before saving.
- Perform Zone tags the email as coming from you.

Add Candidate

When an email is received for a candidate not in your database:

- You will be able to see in outlook that they are not in Perform Zone
- You press "add candidates".
- A pop up appears that allows you to check the data before saving.
- Perform Zone tags the candidate email as coming from you

Unsubscribe

Pressing the unsubscribe buttons allows you to opt them out from receiving marketing.

Why did the outlook add-on save the person's name as their email address?

The outlook plugin uses the candidates or contacts email display name to create their name in their profile within Perform Zone.

This is the most reliable data available in the email to use (email signatures are too random to rely on)

If sender's email software does not have a display name set up, their email display name defaults to their email address.

When you first go to add a person via the outlook plug-in, a form pops up with the extracted name and email address populated.

This gives you a chance to edit the candidates name before saving to your database.

Does the Outlook plugin prevent my emails from being sent?

No. The outlook plugin does not process outgoing emails.
It only reads incoming emails.

It is possible that receiving emails with large attachments will slow down your Outlook as they are being uploaded and saved into Perform Zone by the outlook plugin.

Emails would still have been sent once the outlook process had been completed.

How do I install the advanced Outlook Plugin?

1. Close your Outlook

2. Download and run the latest .NET Framework from http://msdn.microsoft.com/en-us/netframework/aa569263.aspx)
3. Download VSTO from http://www.microsoft.com/downloads/en/details.aspx?FamilyID=54eb3a5a-0e52-40f9-a2d1-eecd7a092dcb&displaylang=en
4. Run the Installation file; TH_Plugin_Setup at http://try.performzone.com/plugins/TH_PluginSetup_3_1_4.msi and complete the installation Wizard.
The URL is the URL that you go to when logging into Perform Zone.
The User name and Passwords are the same that you use when logging into Perform Zone.
5. Open Outlook
6. Click the configurations button and check that your settings are correct by clicking the Validate button.
7. Save the settings

How do I uninstall the outlook plug-in?

1. Close your Outlook.
2. Go to your control panel and uninstall the 3Hats Outlook Add in file for standard outlook plug-in and TH_Plugin file for advanced outlook plug-in (in programs and features - windows 7)
3. Open up Outlook and reset your toolbar-- This is done by clicking on the Add Remove >> Standard>> Reset toolbar
4. Close your Outlook.

How do I insert a hyperlink into an email?

1. Highlight the text in your email that you would like to add the hyperlink and click the LINK button in your editor's tool bar.
2. Complete the fields in the Link pop-up that appears.

This same button allows you to edit your hyperlink later.
Next to the button is an unlink button that removes the hyperlink.

SMS

About SMS

Perform Zone allows you to send SMS's to Candidates, Contacts and Users in the same way that you send emails.
This includes single and bulk sms's.
You can also set up a return SMS function that emails you the candidate's reply to your SMS.
If you are using the Email Forwarder Add On, this reply then gets stored automatically against their profile in Perform Zone.

What is the cost?

There are no set up costs.
SMS Message packages including GST are:

Messaging Package	Included SMS	Cost per SMS
$220	1000	22c
$1,000	5000	20c
$1,700	10000	17c
$8,000	50000	16c

How do I activate SMS?

Contact Perform Zone support on 1300 083 488 or support@performzone.com
we'll set up an account for you with our SMS provider.

You'll be able to login into their site with the passwords we provide you and purchase SMS credits.

How do I prevent users sending SMS's?

You need to add the SMS login details to each user's settings page.
If they are not entered, they won't be able to use.

DASHBOARD GRAPHS

This is a dashboard display for production metrics per recruiter.
The metrics are displayed in a speedometer style, along with totals shown in small table.
Although this is an Add-on module, the first release won't have as a purchasable item.

What data is used?

The only **jobs "considered"** are those with status = Active, Placed, On-hold of Closed (not deleted, leads, draft, pending terms).
The jobs used relate the user selected in the Job SEARCH drop down. All considered jobs that this User is assigned as the Account Manager will be used in the calculations.

Applicants considered have any status (Rejected, Withdrawn, On-hold, Active, Placed)

- **Jobs**
  Number of considered jobs assigned to the User
- **Applied**
  Total number of Considered Job Applicants in Applied + all those and made it to shortlisted, cv sent, interviewed, placed stages for considered jobs assigned to the user.
- **Shortlisted**
  Number of considered applicants that were moved from to shortlisted + CV sent + Interviewed + placed stages for considered jobs assigned to the user.
- **CV sent**
  Number of considered applicants that were moved from to CV sent + interviewed + placed stages for considered jobs assigned to the user.
- **Interviews**
  Number of considered applicants that were moved from to Interviewed + placed stages for considered jobs assigned to the user.
- **Placed**
  Number of Candidates moved to Placed for considered jobs assigned to the user.

Initial Dashboard graphs

When you first turn on the Dashboard Graphs, three pre-set graphs will appear.

Fill Rate = placed applicants for jobs the user was the Account Manager for divided by total number of considered jobs that the User is and was the Account Manager for.

CV Sent / Job = total number of considered applicants at cv sent + interviewed + placed stages divided by number of considered applicants at either Interviewed or placed stage for Considered Jobs.

Interviewed (interviews per cv's sent) = number of considered applicants at either Interviewed or placed stage for Considered Jobs divided by the Number of considered applicants at either CV sent, Interviewed or placed stage.

How do I edit graphs?

Only an Admin user can edit the metrics.
The metrics editor is activated by clicking on the graphs or the metrics editor button.

If no gauges are displayed, the metrics editor button is used to activate the editor.
The same graphs settings appear in all users' screens, the only difference being the User shown in jobs search will change numbers.

- **None**
  Only displays in the denominator = 1 This allows you to set a total instead of a percentage.
- **The Start date** is the start date from when the data used in the graph. Start date is global for all showing graphs.
- The **End date** is now
- **Target** sets the start of the Green color.
  Red always starts at 0%
  orange = target /3
  yellow = target x 2/3
  blue = target x 4/3

How do I clean up my data so that the Dashboard Graphs are accurate?

Associate the correct Account Manager.
Jobs are assigned to a Resourcer and an Account Manager. Only the Account Managers jobs are used in the Graphs. To ensure that you've got the jobs assigned correctly, export a csv with columns job title, employer, date added, job ID and account manager. Manually check you have the right account manager assigned, if not edit in the CSV file. Import the CSV.

VMS

Vendor Management System (VMS) is an add-on.
The add-on allows you to act as a Vendor Manager, receiving applicants from multiple

recruitment agencies, and/or act as a recruitment supplier to a company using the VMS Add –on. Contact support@performzone.com to activate the VMS add-on.

Perform Zone has its own Vendor Management System in place and services clients as a Vendor Manager.
If you are a recruitment agency, you can register to become a vendor to Perform Zone by clicking on http:// www.performzone.com/recruiters/tenders/
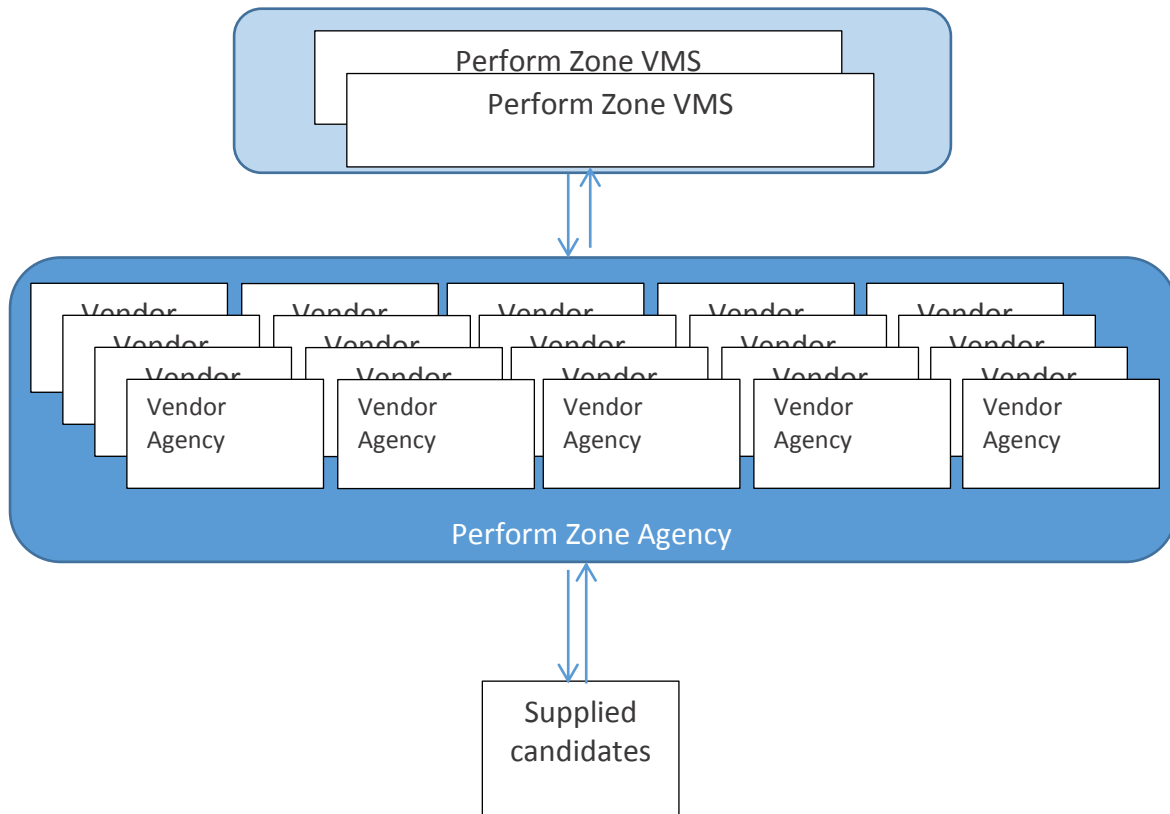
The Vendor managers Add-on we call VMS, the vendor or agency's version we call Agency.

The Vendor Manager authorises certain agencies to provide recruitment services to them. They can then pass job details to their supplier agencies with the click of one button.

The Agency can respond by sending their applicants back to the Vendor manager's VMS. Each has their agency and client has their own database.

How do I create a group of vendors?
Creating a group of vendors allows you to authorize and assign specific vendors to service each of your clients. Ask Perform Zone to create the group.

How do I create a new Vendor?
Each person who works for a Vendor has their own unique login.
You can manually create a Vendor and authorise them.

1. Open the Contact that you want to Authorise

2. Tick Authorise VMS Login
3. Assign them a password
4. Assign them to a VMS group

Next step is to tell the contact their login details.

These are their email and the password you assigned.

How do I temporarily block an Vendor user from using VMS?

Click Block VMS login.
This allows them to still see the list of jobs they can submit candidates for, but prevents them from logging in.

How do I post a job to my vendors?

Select the Group that you would like to Post to within the ADVERTS section for the Career Centre.

SFIA

SFIA (Skills Framework for an Information Age) is a framework for categorising the level of experience that professionals have. See https://www.sfia-online.org.

Perform Zone has embedded inside it this framework as an Add-On for screening applicants.

How do I add SFIA skills to my job?

1. When adding a requirement, select SFIA from the TYPE drop down.
2. Complete the requirements fields in the pop up and press SAVE

TESTS

You can ask one of your internal staff to mark the test, or you can ask Perform Zone support to do the assessment.

An assessment is charged as one hours training. The user will be provided with a report on how they went and directed to links in the Perform Zone manual for areas that they may like to improve upon.

Basic User test

1.   Add an Employer with included contacts

2.   Create a float code against a contact for that employer

3.   Create a Job, filling out all the fields in the Job Details Tab

4.   Create a Gun Candidate Alert

5.   Advertise the job (but make sure that the Job Alert button is un-ticked before you click 'go live')

6.   Manually add a candidate (and assign yourself as a stakeholder)

7.   Add a Job Alert to the Candidate

8.   Assign the newly created candidate to the new job.

9.   Create a Coversheet for the candidate

10.   Set up a Bulk email to relevant candidates for the new job. (Do not send it, just save it)

11.   Move a candidate through to 'Placed' for a job

12.   Assemble rejection letters to unsuccessful candidates (do not send it, just save it)

13.   Set up a manual Job Alert (do not send it, just save it)

14.   Create a new Candidate Communications Template under the Newsletter Category.

Admin User test

1. Save your Outlook Signature as your Perform Zone signature
2. Change one of the Job functions in Settings. Check that it appears on your My Site.
3. Import 10 resumes in zip file
4. Import a CSV file that has three columns and three rows: candidate ID, first name, last name into the candidate database

5. Set the Job Alert email up
6. Set the application confirmation email
7. Add yourself as a user
8. Log out and log back in using your new account
9. Add the Outlook Plugin to your Outlook using your new User Account details
10. Email yourself a word file from your personal email (Hotmail, Gmail etc.)
11. Add yourself to the database using the Outlook Add Candidate Button
12. Subscribe yourself to a job alert
13. Email yourself from within Perform Zone
14. Try to export your candidate data into a CSV file. (You should not be able to as a logged in with User privileges, you need Admin privileges for this)
15. Add a job and check that the default countries appear.
16. Send the job alert out for your job. Ensure it will be sent to you.
17. Apply for your job via the email job alert
18. Inspect your application confirmation email
19. Set Seek account up

TROUBLESHOOTING

Error codes

100
Web site services are not available to you - you need to contact technical support to have them switched on and provide you with an access key.

101
The access key you sent through is incorrect - check your key and then contact technical support to make sure these match.

110
GetJobInfo error - a job with that ID does not exist in your system. Check the job ID being sent through is one that is in your 3Hats/Perform Zone system.

111
Internal server error - these must be referred to technical support, along with details of the call you made.

120
An application already exists for this job and candidate. This occurs when you are trying to create a new application, however the candidate applying already has an application for the job sent through - only 1 application is allowed per job for each candidate.

121
Login of given details failed - no candidate in the database matches the provided details.

124
Website configuration not setup for emails. Some email services need info to be setup on your Perform Zone server in order to successfully send out emails. Please contact technical support to get this setup performed.

300
Error Code 300 is an error returned from SEEK due to unexpected data being sent to them. To see the error, click on the SEEK advert in the Job Boards tab, then go to the right of the screen. Scroll down you will see this error code in the advert status.
Below are some examples.

> Discipline "category" no longer being used
> In July 2010 SEEK updated their Category lists.
> If you clone a SEEK advert that was placed prior to this date, your Categories will need to be reset.
> This means that you will need to go into Job Board Information of your advert, change either the Seek Advertising Section, Industry or Job Classification.
> Once you have changed these, hit the Save icon down the bottom, then hit the Update button on the job boards tab. The changes will occur within the hour.

Invisible salary is a required data entry...
In July 2010 SEEK updated their mandatory fields.
They required a Salary range to be inserted into all their adverts.
SEEK also uses predefined ranges for Salary.
If your My Site salary range in job Board Information is too large, your SEEK advert will show this error.

2038
The error 2038 is a communications error.
The most common reason for this appearing because you are trying to upload a file using a shortcut folder on your server.
Anything that has a directory structure with "//" at the front is a short-cut. You may see something like: //(server)(F)/
Perform Zone cant load documents using a shortcut.
Perform Zone can load using a mapped drive.
Your IT person can easily create a mapped drive link to replace your short cut link.
If the error remains, the next most likely cause is that you have a connection drop out issue or you have a virus in the file you are trying to upload.

How do I map a drive so I can upload files using my shortcuts?

Perform Zone does not accept loading of files from shortcuts, it only accepts loading from mapped drives.
Mapping a network drive is simply connecting to a share on the local network.

How this is done depends on your version of Windows and whether or not you are in a peer-to-peer or client/server environment.

It means creating a connection to a drive that isn't physically connected to your computer so that you can access its contents.

For Windows Vista, go to "Computer" and click "Map Network Drive" on the tool strip toward the top of the window.

For Windows XP, go to "My Computer", click on "Tools" from the menu bar and then "Map Network Drive..." and follow the instructions from above.

For Windows 7

1. Open Windows Explorer by double clicking on the Computer icon on the Desktop.
2. Click on Tools menu and select "Map Network Drive".
3. In the Map Network Drive window select the drive letter from the dropdown list.
4. Type the name of the location of the folder to be mapped or click on Browse button and select the folder to be mapped.
5. Browse for Folder dialog box, navigate to the folder to be mapped and press ok.
6. Click Finish button in the Map Network Drive window.

Your mapped network drive will appear in the Computer folder

Login Problems

If you can't login at all, or the system reports errors during login or simply stalls while loading for more than 10 seconds, please refresh the page in your browser and try again. If after a second try it has the same problem contact Perform Zone support.

These problems are usually due to one of the following issues:

1. Network problems from an unstable or slow link to the internet.
   Perform Zone support can confirm this by a speed test.
   Wireless links will sometimes have this problem.
2. User has been provided with incorrect user name or password.

Outlook Plugin Troubleshooting

My plugin did not install successfully
1. Open and close Outlook: sometimes this will fix things.
2. Reset the Outlook tool bar: click the down arrow on the tool bar which will show 'add/remove buttons' option. Go to the 'standard' section and select the 'reset toolbar' option from this list. Close outlook and re-open
3. Try Adding it from buttons list: click the down arrow on the tool bar which will show 'add/remove buttons' option. Go to the 'standard' section and select the "3Hats add-in" buttons from this list. If not there, try next suggestion.
4. Check if button has been installed: go to Outlook 'Tools' menu. Select 'Options'. Choose tab marked 'Other'. Click 'Advanced options' button. Click 'COM Add-Ins...' button. Look for '3HatsAddin' with a green tick next to it. If no tick, look at the 'Load Behaviour' text at the bottom. Send any errors to Perform Zone support.
5. In Outlook 2007, go to Tools > Trust Center. Click on the Add-ins section. You will now see all active, non-actives, and disabled add-ins. Click on the add-in you want to enable/disable and then click on the Go button towards the bottom. This will then open up the COM add-ins page. You can then check/uncheck the add-ins you want to enable or disable.

My outlook plug-in button intermittently disappears
This occurs when your Outlook crashes.

Outlook has a safety feature that disables plugins when restarting after a crash.

To enable the plug-in:

1. Go to Outlook, select the 'Tools' menu. Select 'Options'.
2. Choose tab marked 'Other'.
3. Click 'Advanced options' button.
4. Click the 'COM Add-Ins...' button.

5. Look for '3HatsAddin'. If there is no tick next to this, please check the check-box to enable the Add-in and press OK.
6. You may need to restart Outlook for the button to re-appear.

To enable the plug-in within Outlook 2007

1. Go to Tools > Trust Center. Click on the Add-ins section.
2. You will now see all active, non-actives, and disabled add-ins. Click on the add-in you want to enable/disable and then click on the Go button towards the bottom.
   This will then open up the COM add-ins page.
3. Check/uncheck the add-ins you want to enable or disable.

To check the Disabled Items in Outlook

1. Go to Outlook and select 'Help' from the main menu, select 'About'.
2. In the 'About' pop-up at the bottom right choose 'Disabled Items...' If you see any items labelled 3Hats or add-In in this menu, select any/all items and click 'Enable'.
3. You should not have any disabled items unless advised by your Administrator.
4. Close and open Outlook and the add-in will reappear.

In Outlook 2007 >

1. On the Tools menu, click Trust Center.
2. In the categories panel, click Add-ins. In the details pane, locate the add-in in the Disabled Application Add-ins list.
3. The Name column specifies the name of the assembly, and the Location column specifies the full path of the application manifest.
4. In the Manage box, click Disabled Add-ins, and then click Go. Select the add-in and click Enable. Click Close.

My Outlook plugin button is installed but will not function
You may get a message saying "No user with those credentials in our system".
Check that your plugin settings are correct.
In the Standard Outlook plugin:

1. Press the lock icon
2. Update the Connection URL to the URL that you use to log into Perform Zone
3. Update the user name and password to your Perform Zone login ones.

My Outlook plugin installed, but I can't see the created comment with email details in Perform Zone.
1. Navigate to the profile of the person you expect to see comments attached
2. Change the comments "Show Only:" drop down to "General"

I can't activate the Outlook plugin on my mac
The outlook plug-in is designed to work only on Windows PC.
Even if you have outlook for macs, it won't work.

I get an "Unhandled exception..." error
Internal emails between Perform Zone Users can't be added as a Candidate or Contact for privacy reasons.

This error occurs when you Select ADD/UPADTE CANDIDATE or ADD/UPDATE Employer Contact when selecting an email from another staff member.

To save the contents into Perform Zone, ignore the error.

The next screen that pops up will allow you to create a new profile or update an existing one based on a match with the email address that you enter.

When I receive an email from Perform Zone, a "download image" box appears.
This is due to Outlooks default security settings. Outlook is configured by default to not automatically download pictures and other linked content from the Internet when you open or preview a message.
Please refer to http://support.microsoft.com/ for the latest information on these settings from Microsoft. Perform Zone uses a 3rd party industry standard email editor to display images. This standard is used by most email mail houses to send newsletters, and they also have the same issue with displaying images in Outlook

Sometimes I get overlapping text

Check that your internet browser zoon is set to 100%.
If it is, try closing your browser and refreshing.

When I enter a phone number in an employer profile it is not saving all of it

There is a limit of 14 numbers, with spaces for telephone numbers.
There is an additional 4 numbers with spaces, for the area code.
The number will cut off at 14 numbers.
If you have a number over 14 numbers check if the first part of it is an area code, if so enter that in the area code field.

Why am I getting a warning about Adobe Flash Player?

Perform Zone uses the most current version of Adobe Flash Player to optimise performance and enhancements for the application.
If you see this warning then you need to update your Flash version.
It is free and very easy to install.

To do so:

1. The first thing to do is work out if you have permission to install software.
   If yes go to step 2 if no you need to contact your system administrator and get permission to install the software.
2. Follow this link http://www.adobe.com/shockwave/download/alternates/#fp
3. Choose the correct operating system, download and install.

If you have issues with installation or using Flash Player go here
http://www.adobe.com/support/flashplayer/

4. Restart your browser and go to your Perform Zone log-in page.

Why do I get connection drop outs?

Connection issues are rarely due to Perform Zone software failure.
All connection issues we have seen to date stem from the user's own local environment.

To troubleshoot:

1. Clear your browser cache.
2. Are the issues occurring on every company computer?
    Log into Perform Zone on every computer in your office and leave on until a drop is detected.
    If the drop out does not occur on all computers there is a local connection issue, see your IT administrator for the solution.
3. Is your screen saver logging you out of the internet?
    If you are only running one office, locate an offsite computer and run the same test as above. If a drop out does not occur on the remote computer, then the issue is related to the office internet connection. See your IT administrator for the solution.
4. Replicate what you were doing just prior to getting the drop out.
    If doing the same thing in Perform Zone results in a drop out, send an alert to support stating what you did to get the drop out.

Why do odd characters appear in my emails?

The odd characters are HTML characters most likely generated from pasting form Word.
To avoid these, instead of using keyboard shortcuts, either manually type in the text or use the paste from Word button in your Perform Zone editor.

Why does the search window seem too small for my screen, I can't get to "close" or "save"?

Most likely your screen resolution on your PC is too small.

To fix this in windows

1. Go to "Control Panel" on your PC and click on "Display" then got to settings.
2. From here you can increase the screen resolution.

If this does not solve the issue, it could be that your internet browser zoom is not set to 100%.

It might be that too many personalized toolbars are restricting the screen view.
To fix this Click on view on top of your browser and untick any options that you do not need.
This will increase the screen size.

Why doesn't my Location link open up in Google maps showing the actual street address?

The location link requires you to have Google's latest version of Google Maps installed.

SPAM bounce backs

We're continually updating Perform Zone's email systems to ensure that your emails are not caught in spam filters.

Gmail has a filter that records the behaviour of other Gmail users, such as many people reporting spam from a particular sender. This one we can't get past.
You can see how spammy your email content is by running a spam check, this is a handy site
: http://www.emailspamtest.com/run-spam-test.aspx
There are some more anti-spam tools in the setting up email section of this manual that your IT person can follow.

Locating missing data

Ever have that feeling that you've created a profile - but can't find it? Here are a few tips:

- Someone may have deleted or merged the profile.
  Search within the RESTORE option in the ACTION button.

- Someone may have archived the Candidate.
  Change the SEARCH option in CANDIDATES to include archived Candidates

- You may be searching on wrong spelling.
  Do partial searches on names, phone numbers and email addresses in the Keyword search.

"I can't copy and paste in Safari"

This is mostly likely a security setting in Safari.

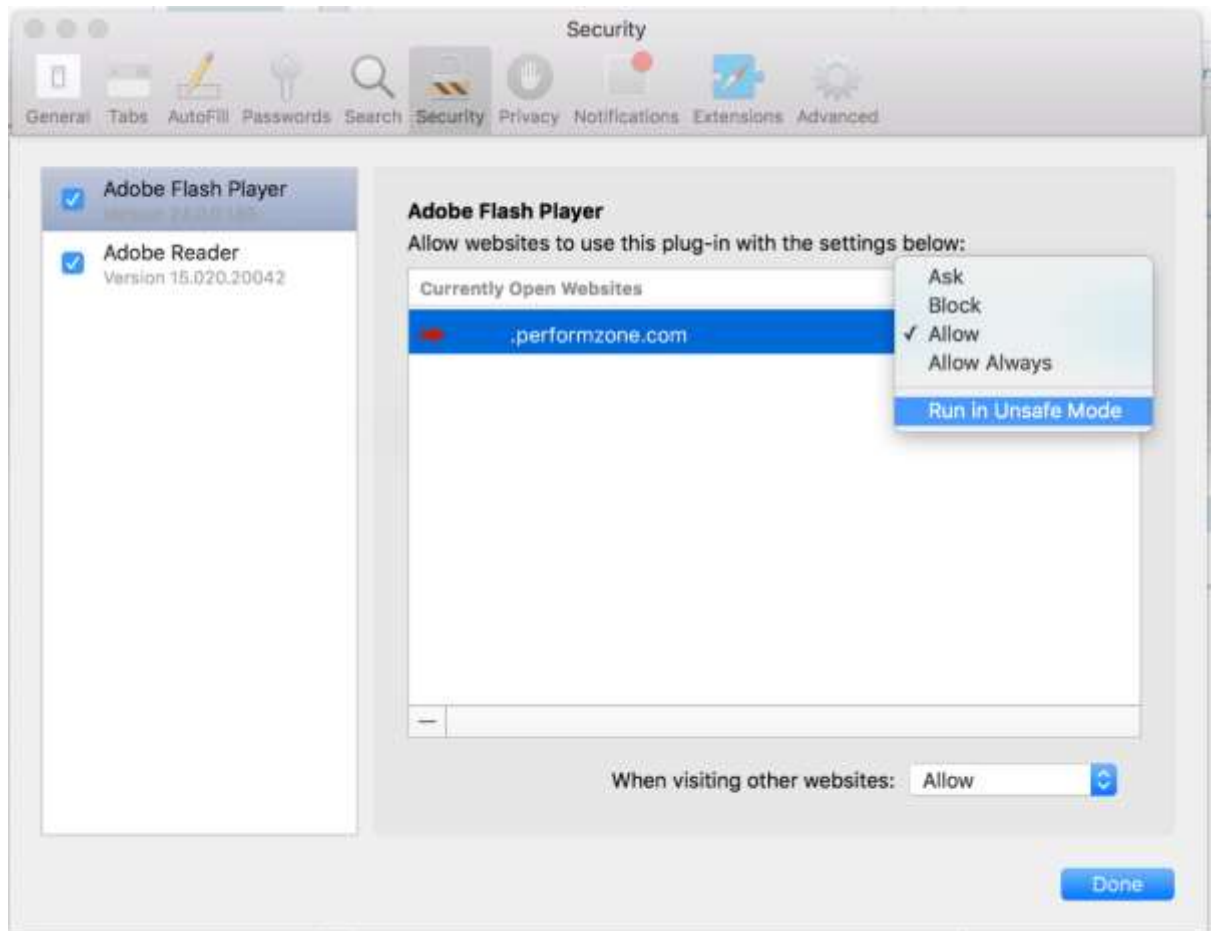1. Open up Safari, click "Safari" menu item and select "Preferences"

2. Select Security

3. Select Plug-in Settings

4. Select Adobe Flash Player, highlight your PZ website, select "Run in Unsafe mode". Press done

5. Close down Safari and reopen it.

GLOSSARY

Comment Type	Allows user to group comments, for example client visits, left message, spoke to.
Changed	Appears as a column in PLACED. This is the last time application data was changed.
Currency	The dollar currency of the salary. Appears in the job DETAILS tab and can be used as a merge field in adverts.