CREATE OFFICIAL OFFER DOCUMENT



The <u>offer outline form</u> **must** be approved <u>before</u> this step can be complete. Once the outline form is approved, the candidates HR status should automatically update to "<u>Extend Offer</u>" by the system. This process performs best in the Mozilla Firefox browser.

- 1. From within the **REQ** folder, select the chosen candidate from the list of candidates.
- 2. Click "Create Document" via the Actions menu on the left. See Figure 1-1.

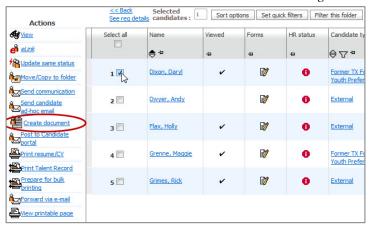


Figure 1-1: Create Offer Document

- 3. Select the <u>correct</u> document template from the list and click <u>Go</u>. Templates are labeled **HOURLY** or **MONTHLY**, select according to how the position was posted.
- 4. The Create document page displays. See Figure 1-2.

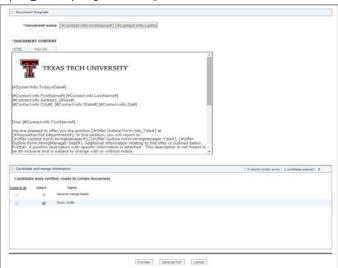


Figure 1-2: Create document page

- 5. Click "Preview" to see what your document will look like when printed. Click the **X** in the top right corner to close the preview window.
- 6. Click "Save as PDF" to create a PDF version of this document.

7. Click GO to post the document to the Candidate Zone.

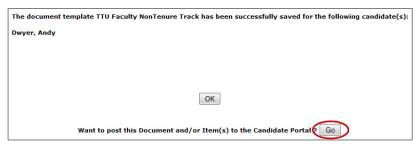


Figure 1- 3: Option to post to Candidate Zone

- 8. Confirm the document is selected. If it does not appear, search by typing Offer Document in the box. See Figure 1-4.
- 9. Choose a date to remove the letter from the Candidate ZONE. All offers should have an expiration date.
- 10. Click "Post to Candidate ZONE".



Figure 1-4: Section of page to post to Candidate ZONE

- 11. The confirmation window will open and show whether the posting was successful or unsuccessful. The option to send an email communication to the candidate will appear. See Figure 1-5
- 12. Ensure the <u>correct</u> email template is selected: **External** or **Internal**, then click **Go**.



Figure 1-5: Post to Candidate Zone Confirmation

13. The next screen will include the email template. See Figure 1-6.

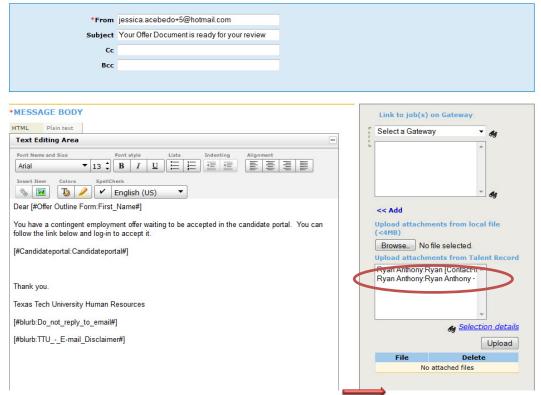
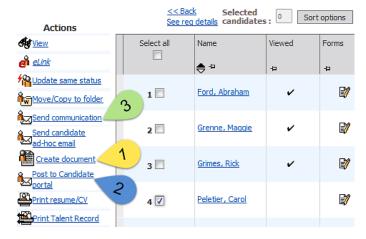


Figure 1- 6: Candidate Offer Email

- 14. The **Position Description** should be added to this email to send to the candidate.
 - Click "Browse" under the Upload Attachments from local file header. See Figure 1-6.
 - Browse for your document on your computer and follow screen instruction to upload.
 - Once the process is complete, the file will show up in the bottom right corner under **File**. See Figure 1-6.
- 15. Click "Preview" to see what your email will look like. Click the X in the top right corner to close the preview window.
- 16. Click "Send" to complete and notify the candidate of the offer.

NOTE: Should a screen close before completion of this process, **ALL** steps can be completed at any time from the actions on the left-hand side.



(Process may also be initiated while in the candidate's talent record from the actions drop-down.)