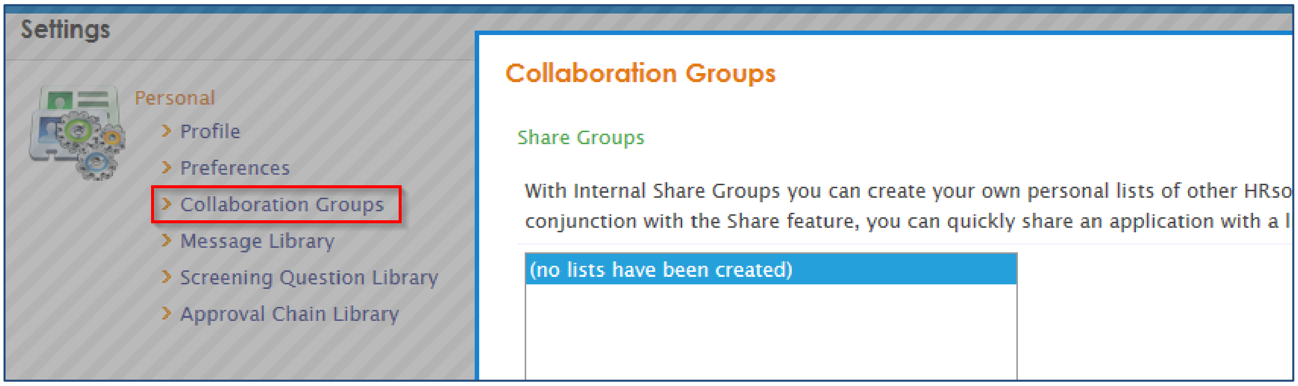
Job Aid – Collaboration Groups – January 2015

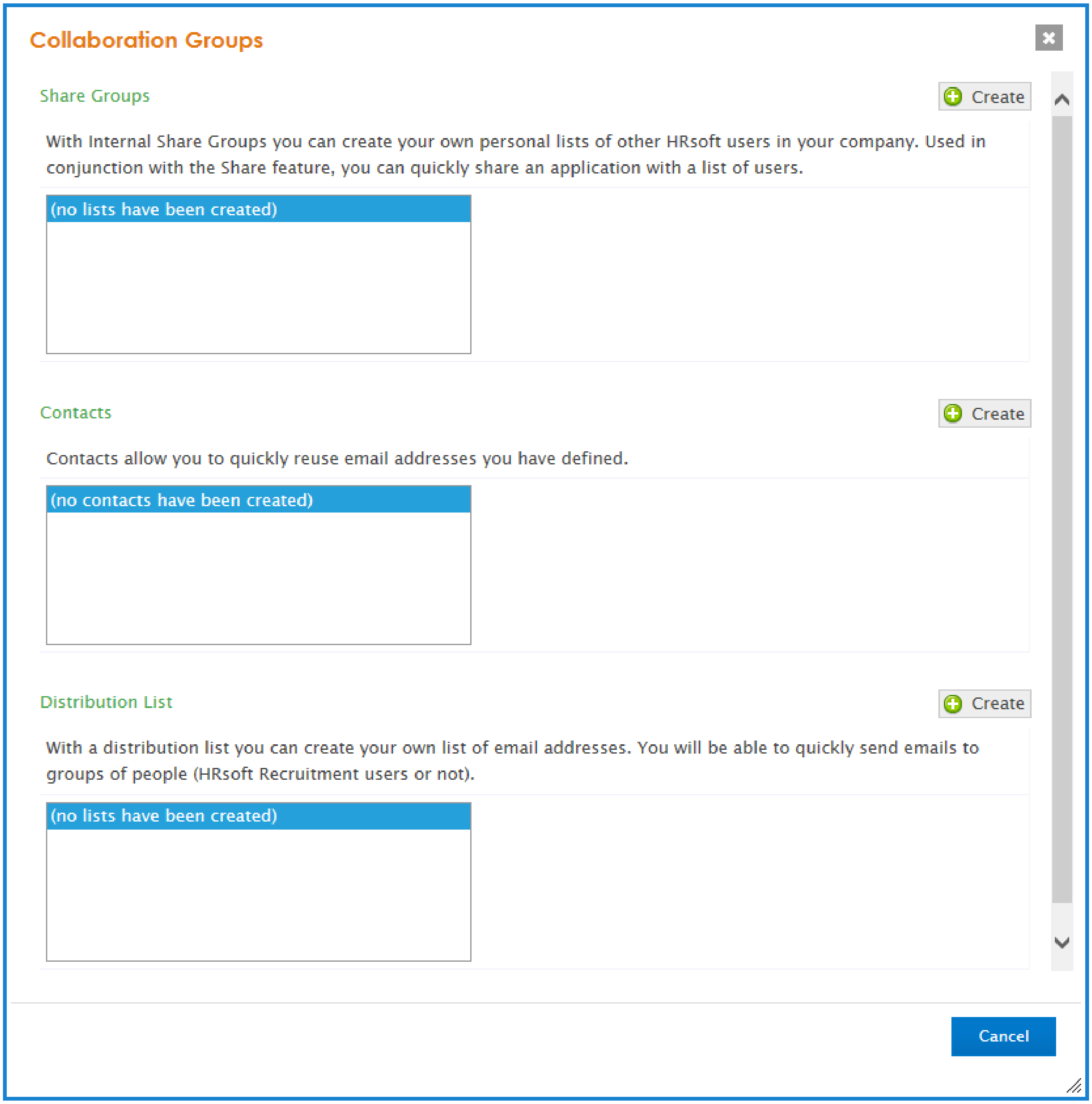


RECRUITview users can set up collaboration groups in their personal preferences to facilitate communication of data from within the system to other RECRUITview users and others. There are three types of collaboration groups:

- **Share Groups** – With Internal Share Groups you can create your own personal lists of other HRsoft users in your company. Used in conjunction with the Share feature, you can quickly share a job or a candidate with a list of users.
- **Contacts** – Allows you to quickly re-use email addresses you have defined (note that non-system recipients must be defined under Contacts before they can be used in Distribution Lists).
- **Distribution List** – With a distribution list you can create your own list of email addresses. You will be able to quickly send emails to groups of people, whether RECRUITview users or not.

Configuring Collaboration Groups

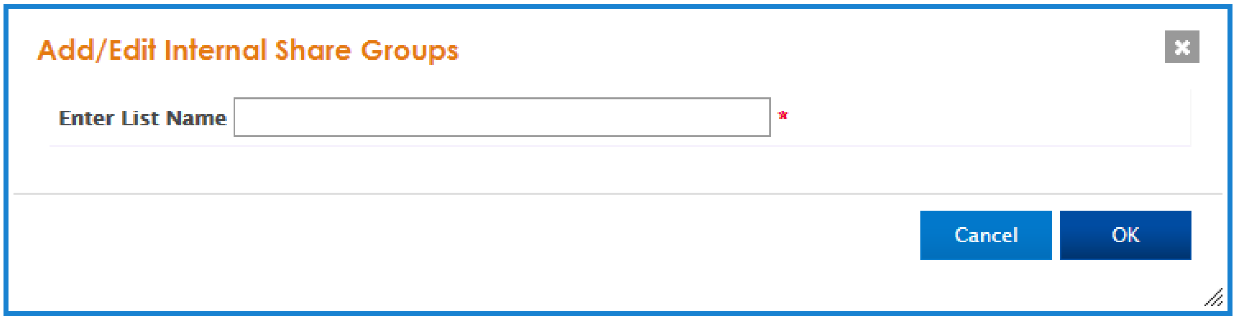
1. Click the **ADMINISTRATION** button.
2. Under the **Settings** >> **Personal** menu, click **Collaboration Groups.** The Collaboration Groups dialog box opens.



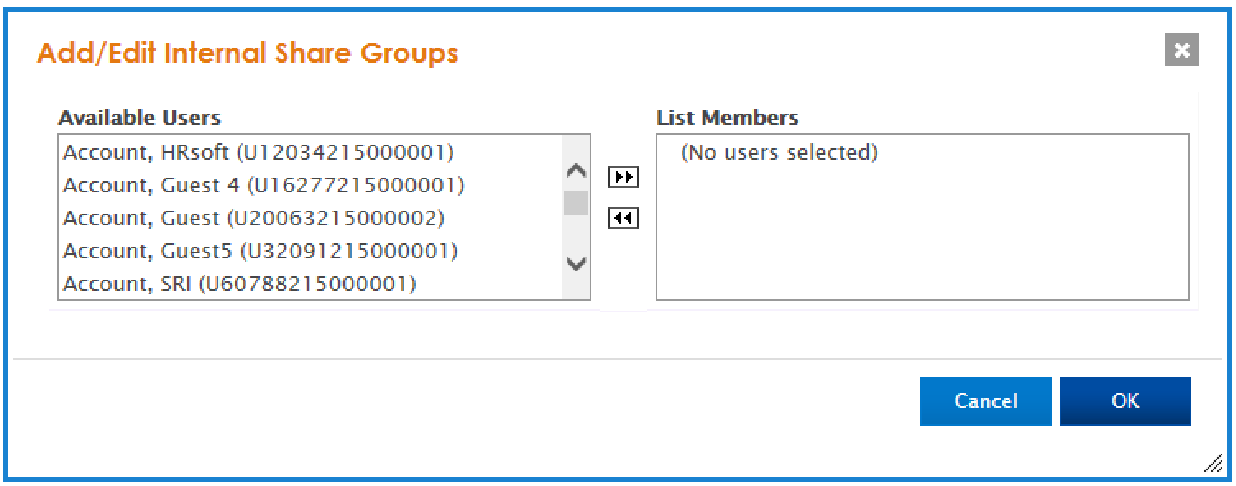
Configuring Share Groups

To add a Share Group

1. In the Collaboration Groups dialog box, click the Create button next to Share Groups. The Add/Edit Internal Share Groups dialog box opens.



2. Enter a List Name and click OK.



3. Select users from the Available Users box on the left (to select more than one user at a time, press and hold the Ctrl key while clicking) and click the right-arrow button to move to the List Members box on the right.
4. To remove users from the list, select users in the List Members box on the right and click the left-arrow button to move to the Available Users box on the right.
5. Click OK.

To edit an existing share group

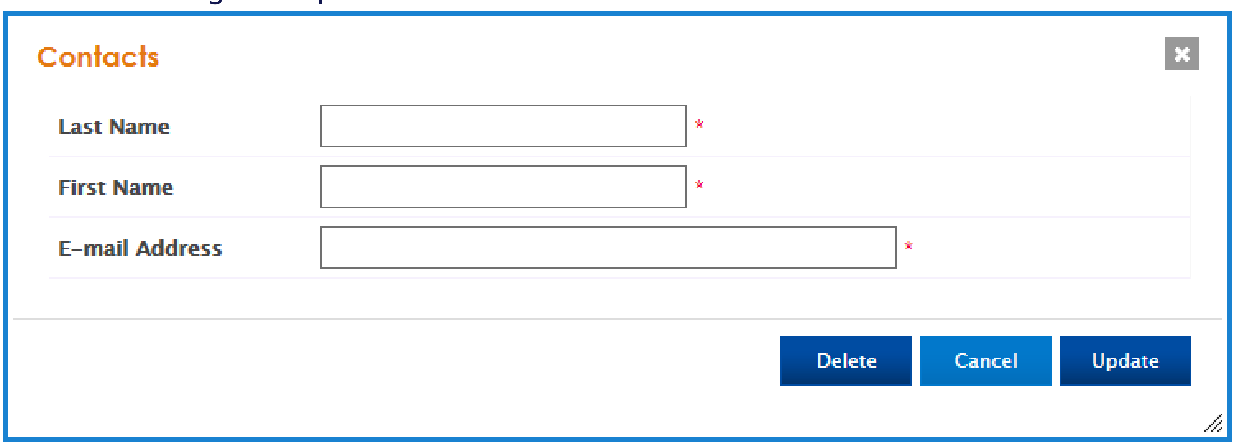
1. In the Collaboration Groups dialog box, select a Share Group from the list and click the Edit button next to Share Groups. The Add/Edit Internal Share Groups dialog box opens.

2. Select users from the Available Users box on the left (to select more than one user at a time, press and hold the Ctrl key while clicking) and click the right-arrow button to move to the List Members box on the right.
3. To remove users from the list, select users in the List Members box on the right and click the left-arrow button to move to the Available Users box on the right.
4. Click OK (removing all list members and clicking OK will delete the list).

Configuring Contacts

To add a Contact

1. In the Collaboration Groups dialog box click the Create button next to Contacts. The Contacts dialog box opens.



2. Enter the required fields.
3. Click Add.

To edit an existing contact

1. In the Collaboration Groups dialog box, select a Contact from the list and click the Edit button next to Contacts.
2. Make the desired changes.
3. Click Update.

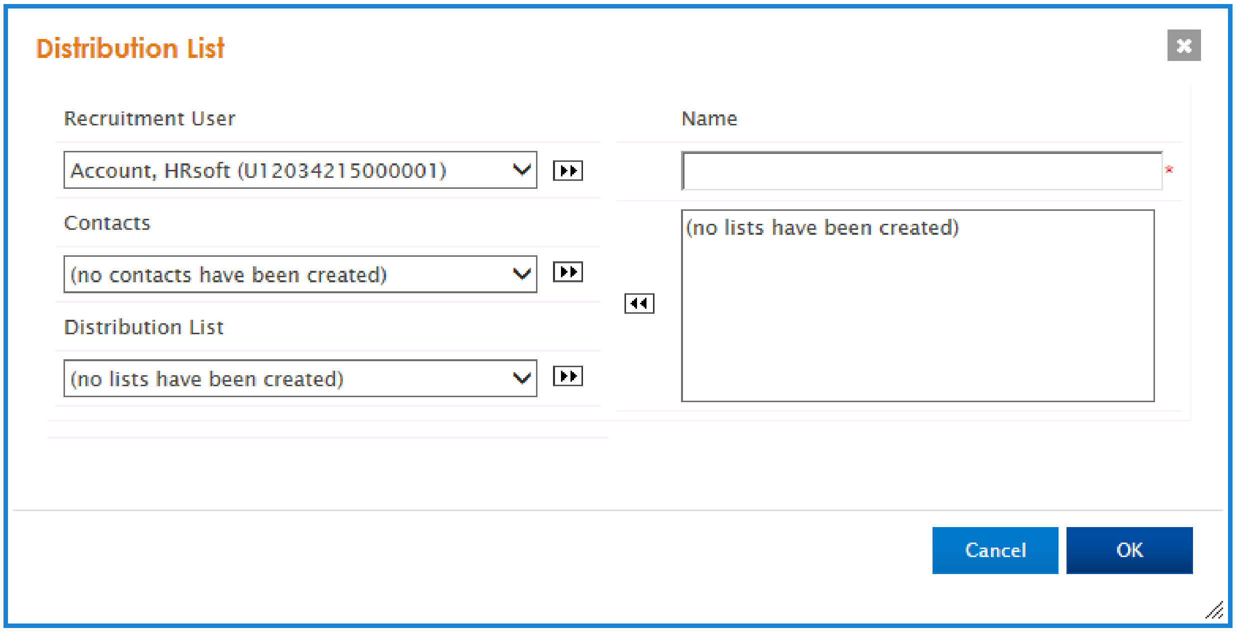
To delete a contact

1. In the Collaboration Groups dialog box, select the Contact from the list and click the Edit button next to Contacts.
2. Click Delete.

Configuring Distribution Lists

To add a Distribution List

1. In the Collaboration Groups dialog box, click the Create button next to Distribution List. The Distribution List dialog box opens.



2. Enter a name for the Distribution List.
3. Select from Recruitment Users, Contacts, or Distribution Lists on the left and click the right-arrow button to move into the List Members box on the right.
4. To remove users from the list, select users in the List Members box on the right and click the left-arrow button.
5. Click OK.

To edit a Distribution List

1. In the Collaboration Groups dialog box, select the Distribution List from the box and click the Edit button next to Distribution List.
2. Make the desired changes.
3. Click OK.

To delete a Distribution List

1. In the Collaboration Groups dialog box, select the Distribution List from the list and click the Edit button next to Distribution List.
2. Click Delete.