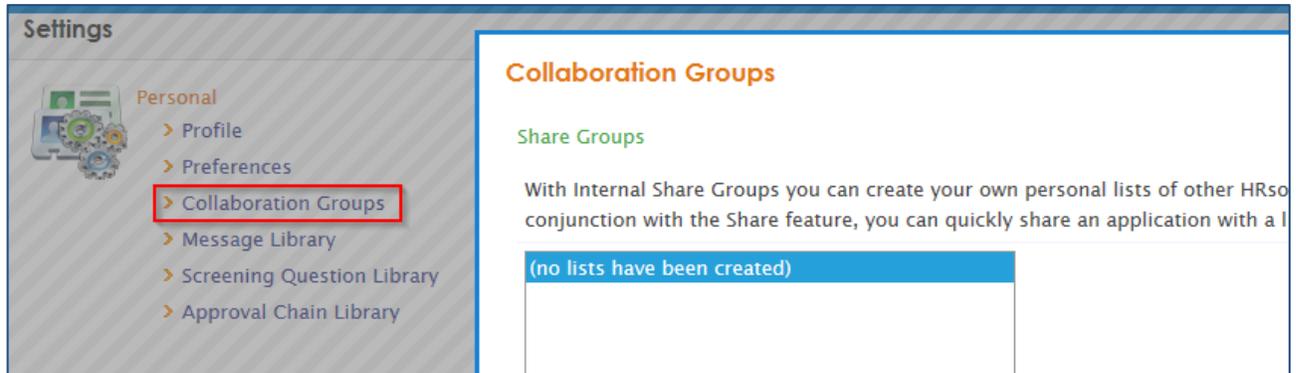


Job Aid – Collaboration Groups – January 2015

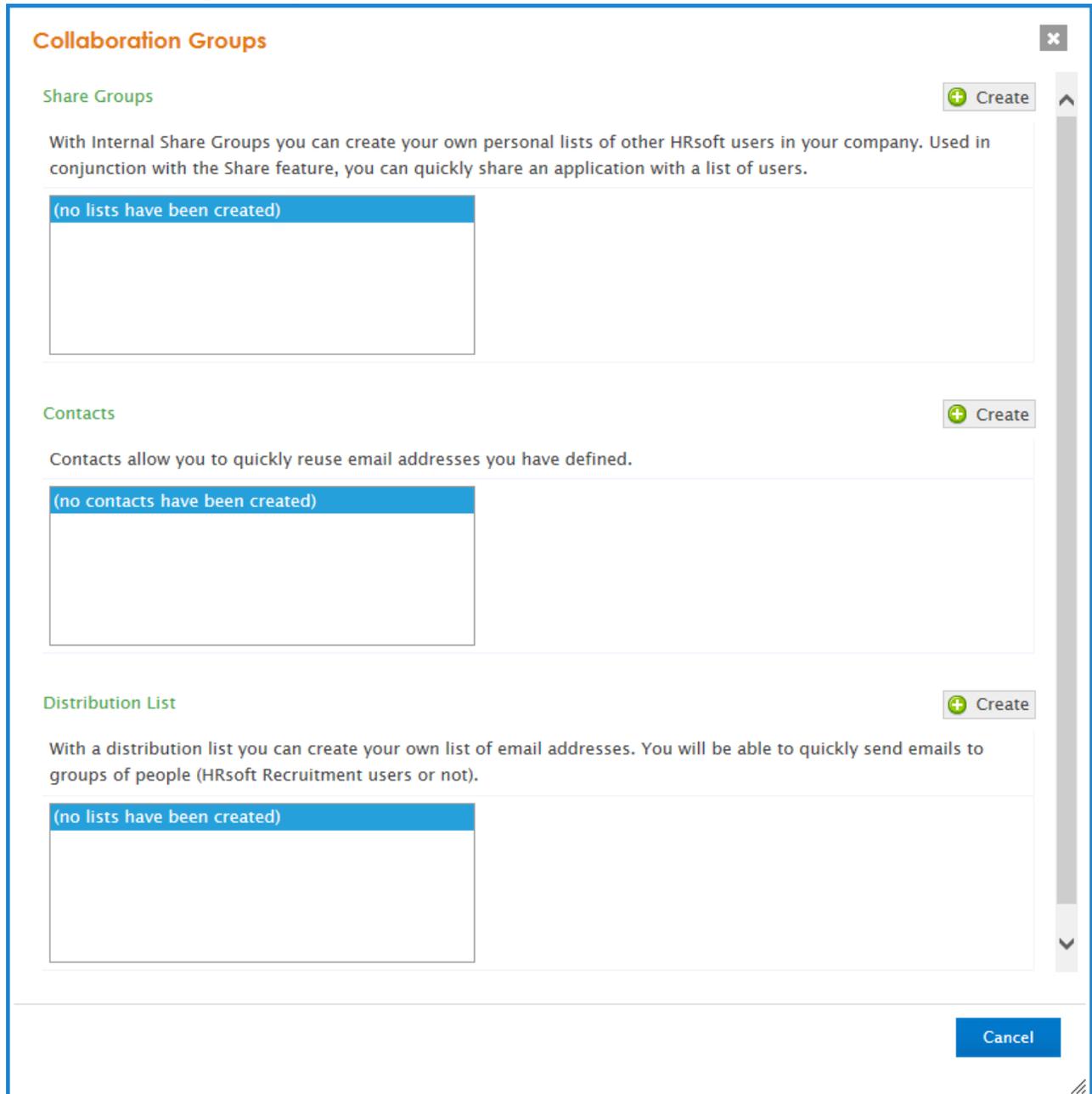


RECRUITview users can set up collaboration groups in their personal preferences to facilitate communication of data from within the system to other RECRUITview users and others. There are three types of collaboration groups:

- **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.



The screenshot shows a dialog box titled "Collaboration Groups" with a close button (X) in the top right corner. The dialog is divided into three sections, each with a "Create" button (plus icon) in the top right corner:

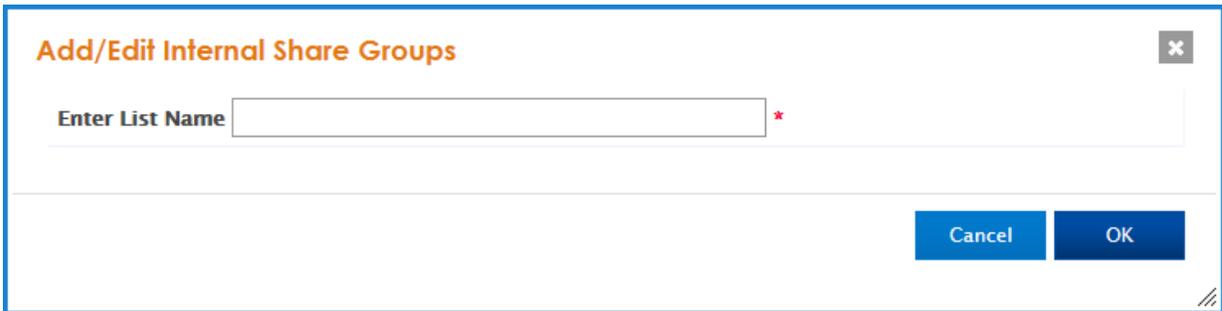
- Share Groups:** Includes a description: "With Internal Share Groups you can create your own personal lists of other HRsoft users in your company. Used in conjunction with the Share feature, you can quickly share an application with a list of users." Below the text is a list area with a blue header that says "(no lists have been created)".
- Contacts:** Includes a description: "Contacts allow you to quickly reuse email addresses you have defined." Below the text is a list area with a blue header that says "(no contacts have been created)".
- Distribution List:** Includes a description: "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 (HRsoft Recruitment users or not)." Below the text is a list area with a blue header that says "(no lists have been created)".

A "Cancel" button is located at the bottom right of the dialog box. A vertical scrollbar is visible on the right side of the dialog.

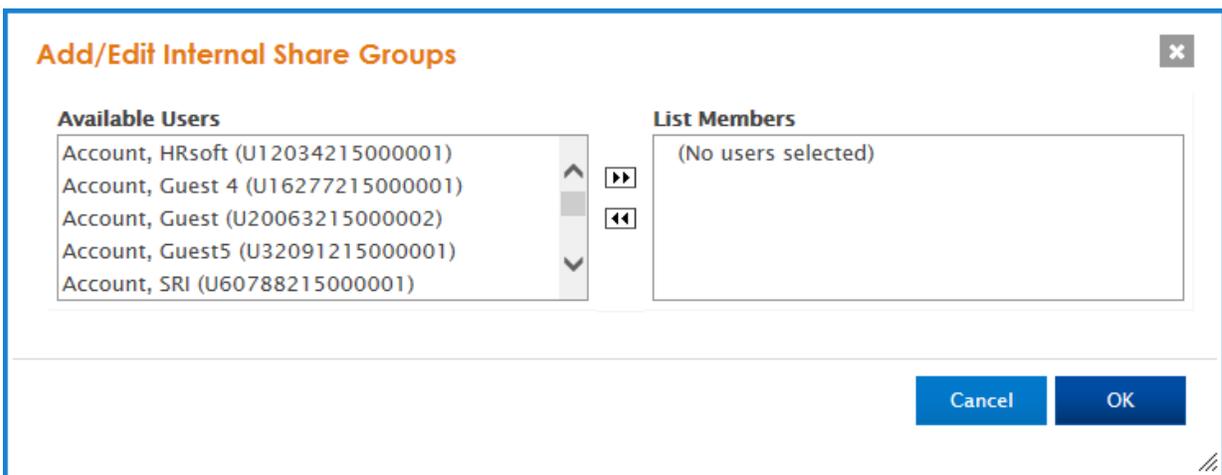
Configuring Share Groups

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

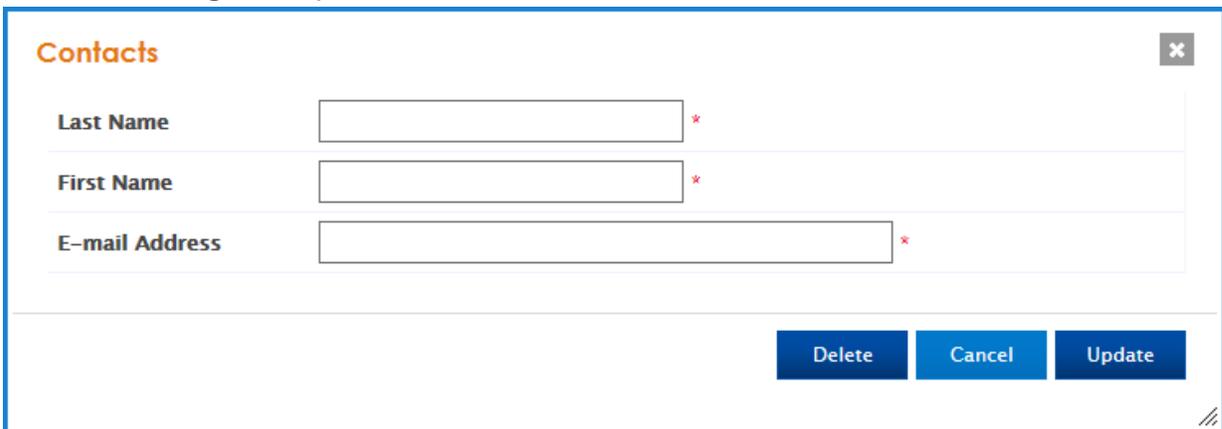
1. In the Collaboration Groups dialog box, select a Share Group from the list and click the Edit button next to Share Groups. The Add/Edit Internal Share Groups dialog box opens.

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.



The screenshot shows a dialog box titled "Contacts" with a close button (X) in the top right corner. It contains three text input fields: "Last Name", "First Name", and "E-mail Address". Each field has a red asterisk (*) to its right, indicating it is a required field. At the bottom right of the dialog box, there are three buttons: "Delete", "Cancel", and "Update".

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.

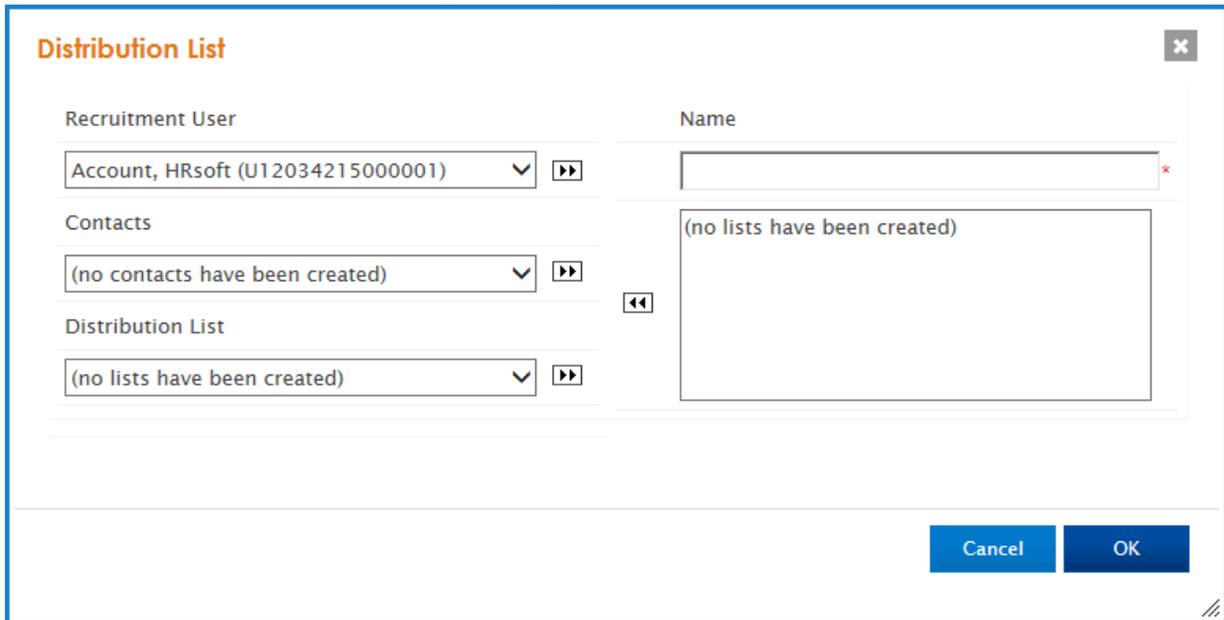
To delete a contact

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.



The screenshot shows the 'Distribution List' dialog box. It has a title bar with a close button. The main area is divided into two columns. The left column contains three dropdown menus: 'Recruitment User' (selected: 'Account, HRsoft (U12034215000001)'), 'Contacts' (selected: '(no contacts have been created)'), and 'Distribution List' (selected: '(no lists have been created)'). Each dropdown has a right-pointing arrow button. The right column has a 'Name' text input field (empty) and a larger list box below it containing the text '(no lists have been created)'. There are left and right arrow buttons between the two columns. At the bottom right, there are 'Cancel' and 'OK' buttons.

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.