intelligence Cheat Sheet: Admin

Use the Admin section of Intelligence to customise your database to your specifications.

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Add a New User

Intelligence Administration

User	Details
Admin	ABC Recruitment
Laura	ABC Recruitment
Colin	ABC Recruitment
John	ABC Recruitment
Shane	ABC Recruitment
Berni	ABC Recruitment
Berni2	ABC Recruitment - Hidden

Left-hand column:
- Users
- Access Code
- Classifications
- Templates
- User Defined Fields
- Can' Contact Classification
- Client Contact Classification
- Booking Status
- Connection
- Email Synchroniser
- System Settings
- Site Names

Edit User Details

Field	Value
User Name	Berni
Password	berni
Site	ABC Recruitment
Security	Bulk Delete
Email Address	berni@intel-sw.com

Hide User   Log This User Off

Edit User Details

- User Name
- Password
- Site
- Security
- Email Address

Normal Access
Reporting Access
Bulk Delete

Hide User

Select **Users** on the left-hand column – you will see the selected icon is yellow.

1. Click on the Plus (Add) button to add a new username.

2. Set (and confirm) the password

3. Select the Site from the drop-down menu

4. Select the appropriate Security level:
   a. Normal Access – everything except Reports and Bulk Delete access
   b. Reporting Access – access to Reports
   c. Bulk Delete – access to Bulk Delete options from Saved Searches.

5. Input the new user's email address. This is required to identify the user in the Email Synchroniser and Chrome Extension that integrates LinkedIn with Intelligence.

6. Edit a User by selecting the user and clicking on the Edit (pencil) button
   a. Hide a User to make that username inactive.
   b. Log This User Off – this button will allow you to log a user off from the database.

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Set up Email Synchroniser (non Outlook 365)

Activate the **Email Synchroniser** for to track incoming and outgoing emails to any matching email address in your candidates and company contacts database. This requires the email account to be IMAP compatible - please contact us if you would like further information on this option.

Select **Email Synchroniser** on the left-hand column to add or edit an email account for email synchronisation.

1. Click on the Plus (Add) button to add a account, or the Edit (pencil) button to edit an existing entry.

2. Input the hostname, username, password and Intelligence username, and click on **Enable** to activate. If you don't know these details, your email service provider will be able to provide this to you.

3. Click on Save – you will be prompted to input the email account password. This is encrypted for your security.

4. If the connection is successfully validated, you will see a SUCCESS message. If it fails, then one of the parameters entered may be incorrect. Please contact Intelligence to assist further.

Set up Email Synchroniser (Outlook 365)

Activate the **Email Synchroniser** for to track incoming and outgoing emails to any matching email address in your candidates and company contacts database. This requires the email account to be IMAP compatible - please contact us if you would like further information on this option.

We have a new email synchronisation system for our customers who use Microsoft as their email platform, which makes use of Microsoft's Modern Authentication. It may be that your mail administrator will have to authenticate our application before other users can log in.

Email Synchroniser

Please note that you have to use an authenticated Admin profile on a Microsoft Exchange account.

Select your server region & sign into your account

EUROPEAN SERVER

AFRICAN SERVER

To subscribe:
1. Go to the web site https://www.intel-sw.com/blog/email-synchroniser/ and login with the password Berni
2. Please select the European or African Server to connect to, depending on your region.
3. The page will redirect to a Microsoft login page. Please login in with your email address and password.
4. Once logged in, we will check your email address against your Intelligence database and, if there is a matching user record, it will allow you to subscribe to this service.

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Add Custom Fields

You can set 21 Custom Fields in Intelligence – these are split over the Candidate, Client and Company Contact screens.
Simply type your value next to the field to activate it.

Intelligence Administration

★ Users	
★ Access Code	
★ Classifications	
★ Templates	
★ User Defined Fields	
★ Can' Contact Classification	
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★ System Settings	
★ Site Names	

Description	Value
Text field 1- Candidate Edit Screen	Availability
Text field 2 - Candidate Edit Screen	Expected Salary
Text field 3 - Candidate Edit Screen	
Text field 4- Candidate Edit Screen	
Text field 5 - Candidate Edit Screen	
Text field 6 - Candidate Edit Screen	
Text field 7 - Candidate Edit Screen	
Text field 8 - Candidate Edit Screen	
Text field 9 - Candidate Edit Screen	
Number field 10 - Candidate Edit Screen	
Date field 11 - Candidate Edit Screen	Drivers Licence Date
Date field 12 - Candidate Edit Screen	

Date field 13 - Candidate Edit Screen	Date of Qualification
Text field 14 - Candidate Main Screen	Alt Email
Text field 15 - Client Staff	UDF1
Text field 16 - Client Staff	UDF2
Text field 17 - Client Screen	
Text field 18 - Client Screen	
Text Field 19 - Candidate Fax	
Text Field 20- Candidate Web	
Text Field 21 - Employment History	Reports to
Long Text Field 22 - Candidate	Notes
Long Text Field 23 - Candidate	Opening
Long Text Field 24 - Candidate	Education (Computer Skills)

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Add Custom Fields (continued)

Custom fields for Candidates

Rename Labels on Candidate screen:

- Fax, Web, Notes, Opening Statement, Other Information, Education

Candidate Record:

- Text field #14 is commonly used for an alternative email field, as this 2nd email is also checked by the Email Synchroniser)
- This is displayed together with the primary email address on the candidate screen.

Extra fields for Candidate records:

- Up to 9 Text fields
- 1 Number field
- Up to 3 Date fields

Add Custom Fields (continued)

Custom fields for Candidate Employment records, Clients and Company Contacts

Extra fields for Candidate Employment records:

- 1 x Text field (commonly used for Reason for Leaving)

Extra fields for Client records:

- 2 x Text fields

Extra fields for Company Contacts records:

- 2 x Text fields

Add Classifications for Communication entries

Select either the **Can' Contact Classifications** (Candidates) **or Client Contact Classification** on the left-hand column to add contact note classifications.

New Candidate Contact

Contact Detail		Diary Event	
18 Jul 2022	Classification	Time / Date	

Call
CV
Email
Email
Interview
SMS

Intelligence Administration

Users	Classification
Access Code	Email
Classifications	Mail
Templates	SMS
User Defined Fields	Phone
Can' Contact Classification	CV
Client Contact Classification	Interview
Booking Status	
Connection	
Email Synchroniser	
System Settings	
Site Names	

Click on the Add (Plus) button to add a new line, and simply type in your required value.

It is not advisable to rename the entries for **CV** and **Interview** as these are used specifically in the shortlist process.

Be aware that editing an existing item will change all existing contact note classifications of the edited item to the new name.

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Add Classifications for Candidates, Clients or Vacancies

Select **Classifications** on the left-hand column to add or edit classifications for candidates, clients or vacancies. This is a tree structure of classifications of any size and depth. For example, you can create candidates classification structures for job type, industry, location etc.

Click on the Add (Plus) button to add a new classification

1. ID is an automatically generated number and it not editable.

2. ParentID links sub-classifications to its parent classification.
- The ParentID is always 0 (zero) when it is the 1st level of classification
- In the example shown, the ParentIDs of all the sub-classifications of "Highest Qualification" is 160 – this matches the ID of the entry "Highest Qualification"
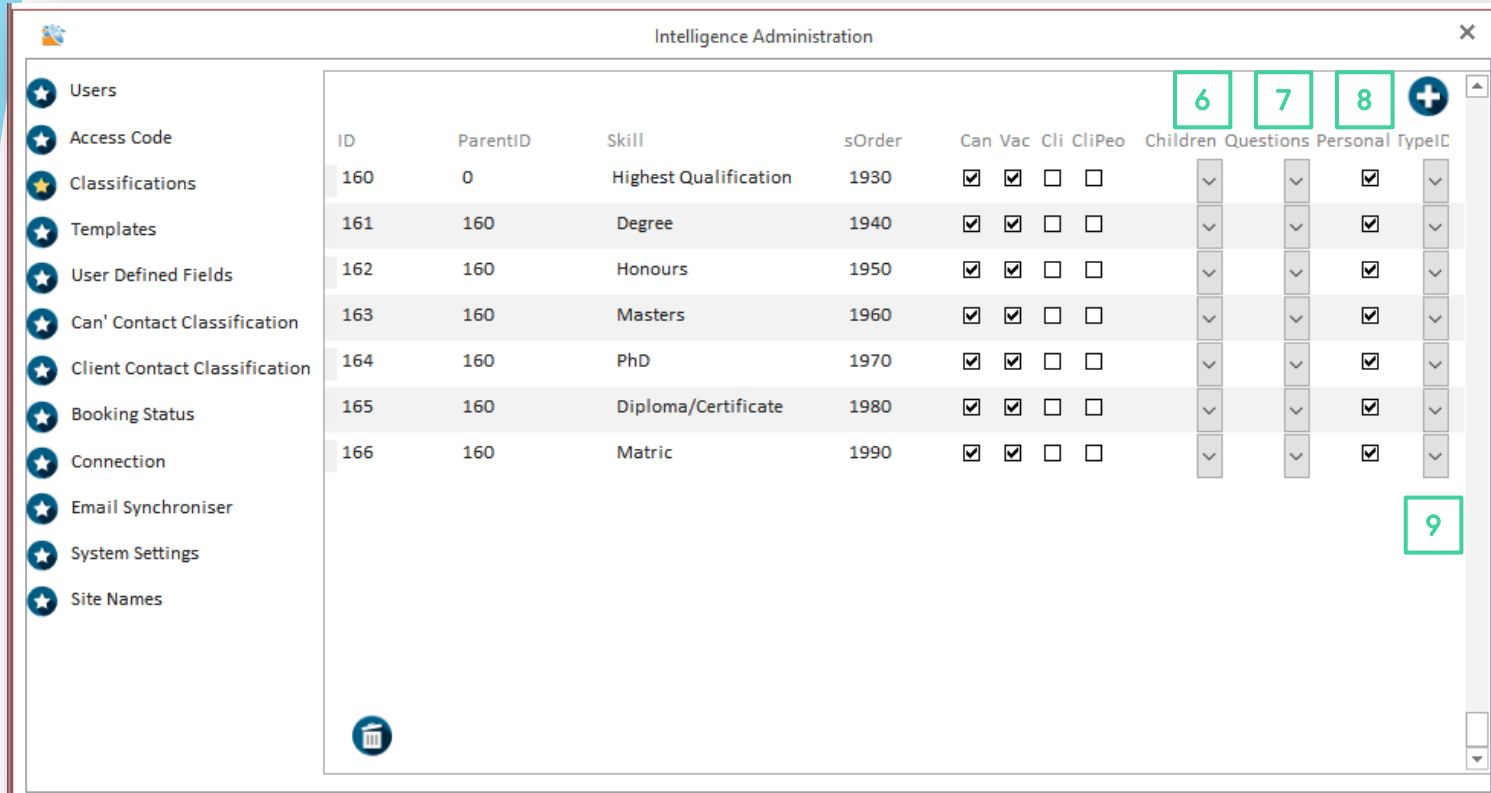
3. Type in the Skill as you wish to see it on-screen.

4. sOrder controls the sort order of the classifications – to change the sort order, simply change the sOrder value. Closing the form with update the sort order.

5. Can | Vac | Cli | CliPeo tickboxes:
Tick the relevant box to display where the classification will appear.
Can = Candidate
Vac = Vacancy
Cli = Client
CliPeo = Company Contacts

Add Classifications for Candidates, Clients or Vacancies (continued)

Select **Classifications** on the left-hand column to add or edit classifications for candidates, clients or vacancies.This is a tree structure of classifications of any size and depth.
Typically, Intelligence customers will create candidates classification structures for job type, industry, location etc.

Intelligence Administration

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ID	ParentID	Skill	sOrder	Can	Vac	Cli	CliPeo	Children	Questions	Personal	TypeID
160	0	Highest Qualification	1930	☑	☑	☐	☐	∨	∨	☑	∨
161	160	Degree	1940	☑	☑	☐	☐	∨	∨	☑	∨
162	160	Honours	1950	☑	☑	☐	☐	∨	∨	☑	∨
163	160	Masters	1960	☑	☑	☐	☐	∨	∨	☑	∨
164	160	PhD	1970	☑	☑	☐	☐	∨	∨	☑	∨
165	160	Diploma/Certificate	1980	☑	☑	☐	☐	∨	∨	☑	∨
166	160	Matric	1990	☑	☑	☐	☐	∨	∨	☑	∨

6. Children – set the number of sub-classifications that should be selected for an answer:

- Null = anything (multi-select tickboxes)
- 0 = one or more (multi-select tickboxes)
- 1 = no more than one (drop-down box to select only one option)
- 2 = exactly one (drop-down box to select only one option)

7. Questions –the available options control how free-text custom questions are answered.

See Cheat Sheet 3 – Add & Edit Vacancies to see how this is used.

8. Personal tickbox – if a classification is ticked under Personal, it will be deleted with the rest of the candidate profile when **Delete Personal Information** is selected.

See Cheat Sheet 1 – Add & Edit a Candidate to see this in action.

9. TypeID – set the entry "Custom Questions" to 1 (Custom Vacancy Question Root) to activate adding a custom question with a free text answer directly from a Vacancy.

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Create Word templates

Create Word templates that can be used for a wide range of purposes - ranging from a quick way to send standard letters to candidates/clients to creating formatted CVs to send to clients.

These templates work by making use of the Bookmark feature within Microsoft Word. Intelligence looks for these bookmarks and replaces them with information from the Intelligence database.
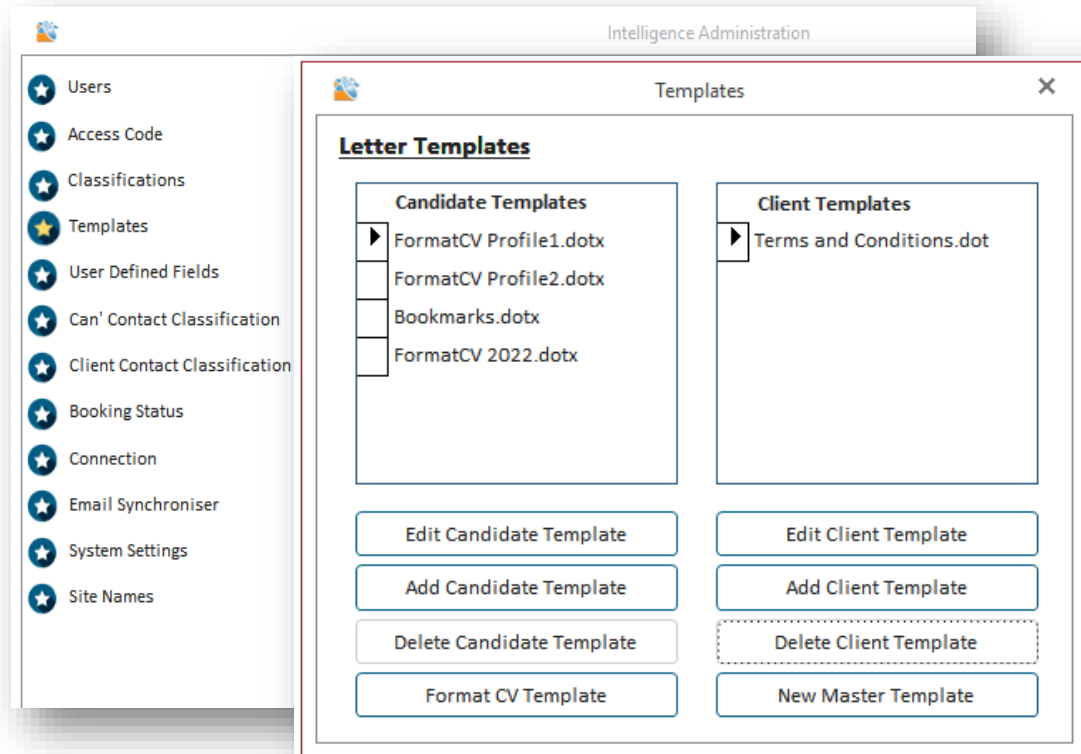
Select Templates from the left-hand menu to open your Letter Templates section.

You can create Candidate- or Client-specific templates by selecting the button "Add Candidate Template" or "Add Client Template" respectively.

Select the button "Format CV Template" to create the template that will format a candidate's CV to send to your client.

You can set up multiple Format CV templates for your company – click on "Add Candidate Template" and name it "FormatCV [name]" e.g. "FormatCV 2022".

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Create Word templates (continued)
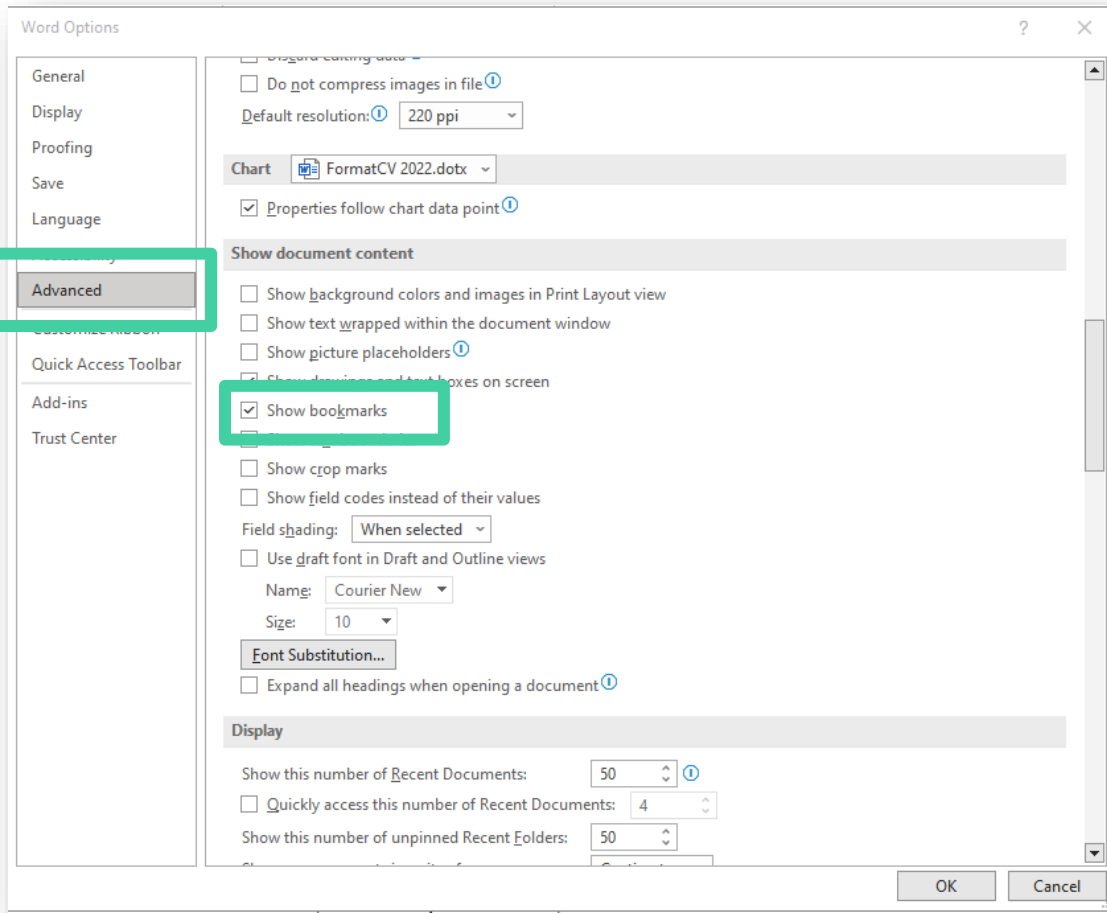
TIP: To view the bookmarks as you work with the document, go to Options in your Word document and under the Advanced tab, tick the box to Show Bookmarks. This will indicate all the bookmarks by surrounding them with square brackets.
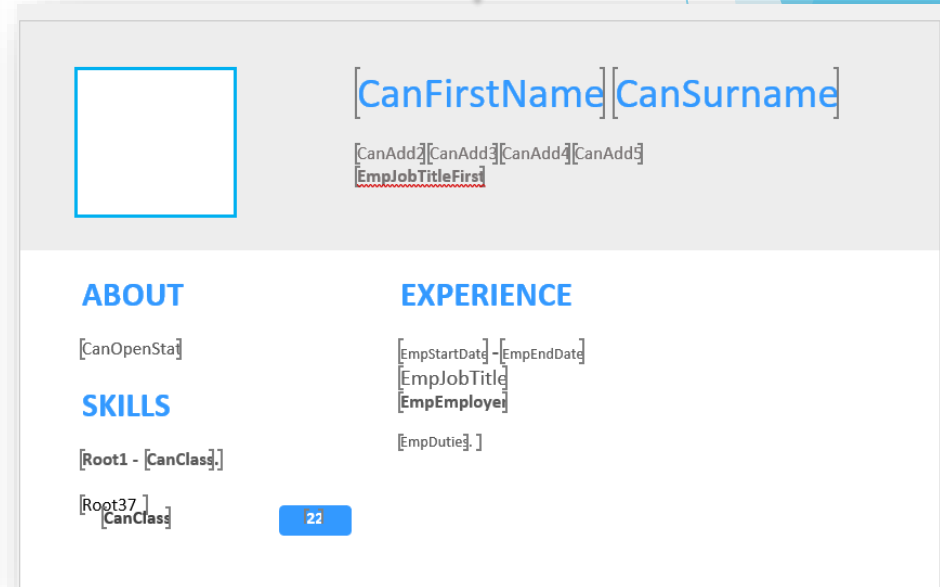
Create Word templates (continued)

Bookmarks
The Candidate Table – All the fields relating to the current candidate selected in Intelligence

Candidate Photograph. This rectangle may be moved and resized onto the first page and will be replaced by the photograph of the current candidate

[CanID]	Intelligence Candidate ID field
[CanTitle]	Title e.g. Mr, Ms, Dr
[CanFirstName]	First name
[CanMiddleName]	Middle name
[CanSurname]	Surname
[CanSalutation]	Salutation or known-as name
[CanAdd1]	Address line 1
[CanAdd2]	Address line 2
[CanAdd3]	Address line 3
[CanAdd4]	Address line 4
[CanAdd5]	Address line 5
[CanPostCode]	Post Code
[CanMobile]	Mobile/Cell Phone number
[CanTel]	Telephone
[CanWork]	Work telephone
[CanEmail]	Email address

TIP: When you create a new template, there is some explanatory text and a list of all available bookmarks.

Bookmarks can easily be cut and pasted like any other section of text, or simply delete the text and bookmarks you don't need.

TIP: Leave a space or carriage return character between bookmarks as Word tends to merge adjacent bookmarks together and this will prevent Intelligence entering all the information required. Example: [CanFirstname] [CanSurname]

Information from Intelligence may relate to ONE record or MANY records.

For example, one record may be the current candidate record and would contain information such as the candidates Name and Contact details. With one record, the bookmarks will relate to the fields within Intelligence.

Alternatively, templates can be constructed with lists of records - such as all the employment details for the current candidate, or vacancies for the current client.

With multiple records, there is a overall bookmark which contains other bookmarks relating to the individual fields.

Templates using Tables to create entries for multiple records

[EmpHistory	This is the Table header for the Candidates employment history
[EmpStartDate]	Start date
[EmpEndDate]	End date
[EmpJobTitle]	Job title
[EmpEmployer]	Employer
[EmpSalary]	Salary
[EmpDuties]	Employment duties
]	End of record marker
[References	References Table for the current candidate
[RefName]	Referees name
[RefJob]	Referees job title
[RefEmployer]	Referees employer
[RefContact]	Referees contact details
[RefTakenBy]	The consultant who took reference
[RefDate]	Date reference taken
[RefDetail]	Detail of the reference

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Repeating Bookmarks

Intelligence allows you to create templates where the information can be made available for each repeating bookmark.

For example, you may want to display a candidate's name in multiple places in a Formatted CV template, such as the header and introduction.

To do this, go to the Insert tab, select Links and Bookmark, and simply create a bookmark with the standard bookmark name and adding an underscore and a number between 1 and 9.

In this example, the bookmark for a candidate's first name is [CanFirstName], but to use it a second time - the bookmark can be called [CanFirstName_1].

This way, both these bookmarks will be replaced with the candidate's firstname.

Create Word templates (continued)

Multiple bookmarks

With multiple records – such as employment histories – there is an overall bookmark that contains other bookmarks relating to the individual fields.

You can insert the **overall bookmark** for Employment History in a similar way to adding a repeating bookmark.

To do this:
- highlight the whole section of the employment details including an extra line above and/or below the section
- go to the Insert tab, select Links and Bookmark
- simply create a bookmark with the standard bookmark name – in this example, the bookmark name is EmpHistory.

This will insert opening and closing bookmark square brackets without the placeholder text.