

SUNGARD

PUBLIC SECTOR
APPLICANT ONLINE

IFAS
Integrated Financial &
Administrative Solution

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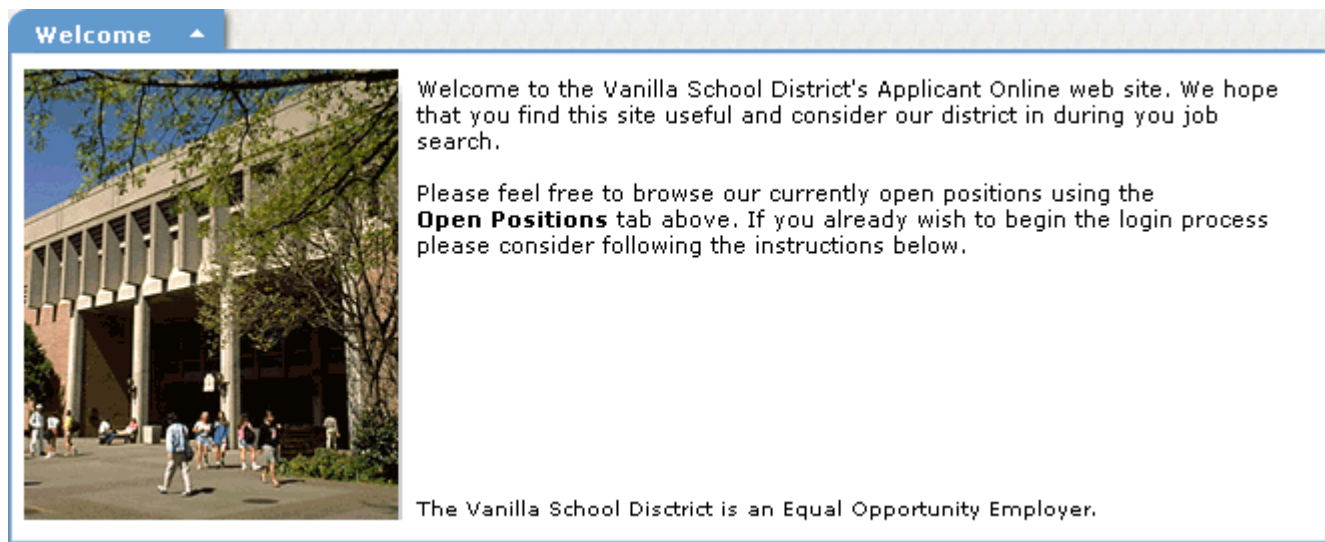
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1 Applicant Online Overview

1.1 Introducing Applicant Online

Applicant Online is SunGard Public Sector's fully automated applicant processing solution. It not only enables you to better locate the most qualified applicants by automating the initial recruitment process, but also significantly reduces the data entry burden on your HR staff by requiring applicants to take responsibility for entering their own application information into the system. You may choose to require staff to review and verify applicant information before it is transferred into the system.

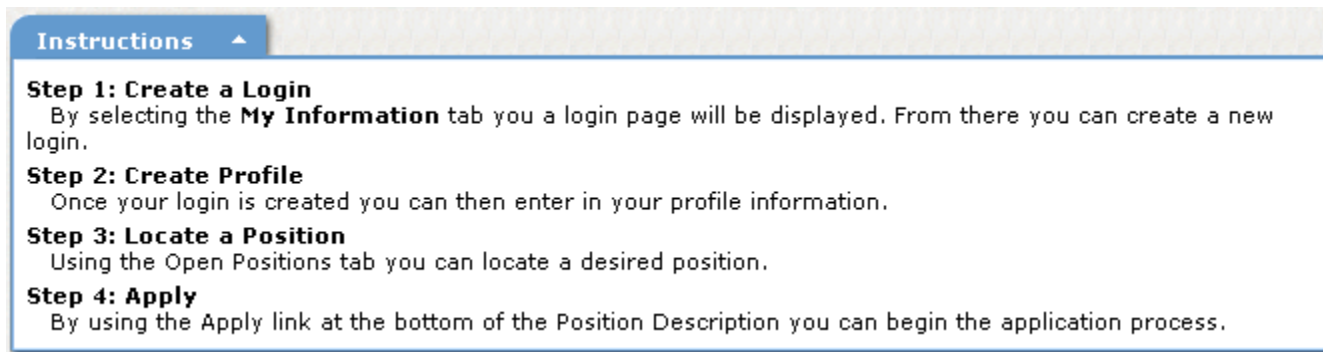


Every Applicant Online screen is highly configurable. The Applicant Online system is custom built by SunGard Public Sector for your particular institution with the data you provide. You may include text and photographs in your AO system pages.

Anybody with Web access may browse openings, but a Login and Profile is required to apply for a position.



Each screen includes instructions to direct users through application process in addition to a “wizard” to guide them, step by step, though the process.



1.1.1 The Applicant Online System

Your AO system can be broken down into two distinct groups of screens: Public Pages and Internal Pages. Each group of screens is described below.

Application Pages

Samples of the Application pages are shown below. Beginning with the Instructions Page and ending with the Submit Page, there are a total of twelve pages used to complete the application process. Your system may vary slightly, as customization is possible.

Instructions Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#)

Application Instructions

Welcome to our Application process. Please take the time to fill out each of the following application pages. You can choose **Finish Later** at any time to disrupt the application process but you must return later and submit the completed application to be considered for this position.

The following steps will be required for completion of this application:

- Start Page
- Name and Address Information
- General Information
- Convictions
- Education
- Licenses
- Skills
- Prior Employment
- Experience
- References
- Attachments
- Finish Page

 [Finish Later](#)[Next](#) 

Demographics Page

Applicant Certificated

1 2 3 4 5 6 7 8 9 10 11 12

Name Information

Login: TERRY

First Name: Terry Middle Initial: Last Name: Hansen

Social Security Number: Preferred Name:

Address Information

Address Line 1: 1010 Main St.

Address Line 2:

City: State: Alaska

Zip: - Country: Canada

Email: TERRY@AOL.COM

Phone Number: CONTACT PHONE NUMBER

 Finish LaterNext 

General Information Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#)

General Information

Are you a U.S. Citizen? ☐ Yes ☐ No

Are there any other names or social security numbers that you have used? ☐ Yes ☐ No

If **Yes**, please include:

Are you fluent with any languages other than english? ☐ Yes ☐ No

If **Yes**, list language(s):

[!\[\]\(d3102649f02e825ddb76dc3de0190154_img.jpg\) Finish Later](#)[Next !\[\]\(4b7a79268f6ba26c1471d4232fffa85a_img.jpg\)](#)

Conviction Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#)

Conviction Information

I do hereby certify under penalty of perjury, either:

- ☒ I have never been convicted of committing a felony or misdemeanor (other than a misdemeanor traffic offense or traffic infraction).
- ☐ I have been convicted of committing a felony or misdemeanor (not including a misdemeanor traffic infraction).

Information specifying the felony or misdemeanor for which I was convicted is as follows:

[Finish Later](#)[Next](#) 

Education Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#)


Education Information

| Degree | School | Major | Minor | Issue Date | GPA | |
|-----------------------|------------|--------------------|------------|------------|-----|------------------------|
| Associate Of The Arts | CSU, Chico | Accounting/Finance | Accounting | 12/7/2003 | 3 | Delete |

Add Education Information

Degree: School:

Major: Minor:

Issue Date:  GPA:

 [Finish Later](#)[Next](#) 

Licenses/Certification Page



Applicant Certified

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#)

License/Certificate Information

| License/Certificate | Issue Date | Expiration Date | |
|---------------------|------------|-----------------|------------------------|
| 2-11 Endorsement | 4/3/1998 | 12/13/2006 | Delete |

Add License/Certification Information

License/Certificate Type: Issue Date: Expiration Date:  [Finish Later](#)[Next](#) 

Skill Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#)

Skill Information

| Skill | Experience | Education | |
|------------|------------|-----------|------------------------|
| Accounting | 5 | 2 | Delete |

Add Skill Information

Skill:

Years from Experience:

Years from Education:

[Finish Later](#)[Next](#) 

Prior Employment Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) **8** [9](#) [10](#) [11](#) [12](#)

Prior Employment

Have you been employed by Vanilla School District? ☐ Yes ☒ No

If **Yes**, please list position:

From:

To:

Are you currently employed with another school district? ☐ Yes ☒ No

If **Yes**, Name of District:

Have you ever been discharged, terminated, fired or forced to resign from a job? ☐ Yes ☒ No

If **Yes**, Name of District:

[Finish Later](#)[Next](#) 

Experience Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) [12](#)

Experience

Experience Type

Teaching

Years Experience

4

[Delete](#)

Add Experience Information

Experience Type: Experience Years:  [Finish Later](#)[Next](#) 

References Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) **10** [11](#) [12](#)

References

| Title | First Name | Last Name | Phone | Years Known | E-Mail |
|-------|------------|-----------|-------|-------------|--------|
|-------|------------|-----------|-------|-------------|--------|

Add References

| | | | |
|-------------|----------------------|--------------|----------------------|
| Title: | <input type="text"/> | Years Known: | <input type="text"/> |
| First Name: | <input type="text"/> | Last Name: | <input type="text"/> |
| Phone: | <input type="text"/> | E-Mail: | <input type="text"/> |

 [Finish Later](#)[Next](#) 

Application Level Attachments

Applicant Certificated

123456789101112

Document/Image Attachments

| Description | Type | Delete |
|--------------------------------------|-----------------------------|------------------------|
| Another Cover Letter | COVERLETTER | Delete |
| Cover Letter | COVERLETTER | Delete |

Add Attachment


Description:


Attachment Type:


COVERLETTER

Local File:

Browse...

 **Add**

 **Finish Later**

Next 

Submit Page

Applicant Certificated

[1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#) [8](#) [9](#) [10](#) [11](#) **12**

You have successfully completed your application. By using the "Apply" link below you can submit your application. Once the application is submitted you cannot edit it. By closing this window without submitting it you can return at a later date and complete the application.

 [Finish Later](#)

 [Apply](#)

Attachments

The Attachments page enables applicants to add information files, such as a resume, to their applications.

The screenshot shows the 'Attachments' page within the 'My Information' section. The navigation bar includes 'Home', 'Open Positions', 'My Information', 'Profile', 'Applications', 'Attachments' (highlighted), and 'E-Mail Preferences'. The main content area is titled 'View Attachments' and features a 'Help' icon. Below this is a 'New Attachment' section with a 'Description' text field, an 'Attachment' dropdown menu currently set to 'HRDOCS', and a 'Local File' text field with a 'Browse...' button. An 'Add' button with a document icon is located at the bottom right of the form.


E-mail Preferences Screen

This page enables users to elect to receive e-mail notifications and indicate the type of position they'd like to be notified about.



The screenshot shows the 'E-mail Preferences' page within the 'My Information' section. The navigation bar includes 'Home', 'Open Positions', 'My Information', 'Profile', 'Applications', 'Attachments', and 'E-Mail Preferences' (highlighted). The main content area is titled 'E-Mail Preferences' and features a 'Help' icon. Below this is a list of notification preferences: 'New Certificated Position' with an unchecked checkbox, and 'New Classified Positions' with a checked checkbox. A 'Save' button with a floppy disk icon is located at the bottom right of the form.

Internal Pages

The internal pages begin with the Application Status page where employees can examine the responses that have been received. Links are displayed in blue. In this example, clicking an item in the Position column will display the description associated with that position.

| Position/Application Status | | | | | | | | | |
|---|----------|--------|----------|----------------|-----------|-----------|----------|----------|--|
| Position | Openings | Filled | FTE | All Incomplete | Submitted | In Review | Verified | Rejected | |
| Administrative Clerk | 1 | 0 | <u>3</u> | <u>2</u> | <u>1</u> | <u>0</u> | <u>0</u> | <u>0</u> | |
| Principal | 1 | 0 | <u>2</u> | <u>2</u> | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> | |
| 7th Grd Math Teacher | 2 | 0 | <u>3</u> | <u>2</u> | <u>1</u> | <u>0</u> | <u>0</u> | <u>0</u> | |
| Status Descriptions: Incomplete - Started but not submitted Submitted - Submitted but nothing verified In Review - At least 1 item verified Verified - All items verified Rejected - Rejected for some reason | | | | | | | | | |
| | | | | | | | | |  Help |

Clicking the All link will provide a list of the applicants for that position. In this case, three applications were received for this position, but they were all submitted by the same person. Rather than submitting three applications, the user may have simply used the “Complete Later” option and submitted only one application. Note only one application was completed. Note also that the confidence level for this user is “0%.” As employees verify/confirm the information submitted in the application, the confidence percentage will go up.

| Position Review - All Submissions | | | | |
|--|--------|------------------|-------------------|--|
| Applicant | Status | Confidence Level | Application Score | Interview Score |
| Adams, John | C | <u>0%</u> | 0 | 0 |
| Adams, John | I | <u>0%</u> | 0 | 0 |
| Adams, John | I | <u>0%</u> | 0 | 0 |
|  Back | | | |  Help |

Click on the Applicant link will display the complete “Application Report” for that individual applicant.

Application Report

Name Information

Login: JADAMS

First Name: John Middle Initial: Last Name: Adams

Social Security Number: Preferred Name:

Address Information

Address Line 1: 1010 Main St.

Address Line 2:

City: Chico State: CA

Zip: 95928 - Country: USA

Email: john.adams@sungardbi-tech.com

Phone Number:

General Information

U.S. Citizen?

Are there any other names or social security numbers that you have used? False

Different Name:

Fluent in Other Languages: False







Other Language List:

Conviction Information


Convicted of a Felony: False

Information specifying the felony or misdemeanor is as follows:


Remember, from the Position Review page, the confidence level for this application was 0%? If you click the Back button on the bottom of the Applicant Report, you may click the Confidence Level link to get the Applicant Verification page for this applicant.

| Applicant Verification  | | | | |
|--|---------------------|--|-----------------|-------|
| Position: 7TH GRD MATH TEACHER | | Applicant: Smith, John | | |
| License Information  | | | | |
| License Verification History | | | | |
| Verification Date | License/Certificate | Issue Date | Expiration Date | |
| Verified | License/Certificate | Issue Date | Expiration Date | |
| Education Information  | | | | |
| Education Verification History | | | | |
| Verification Date | Degree | School | Major | Minor |
| Issue Date | GPA | | | |
| Verified | Degree | School | Major | Minor |
| Issue Date | GPA | | | |
| Skill Information  | | | | |
| Skills Verification History | | | | |
| Verification Date | Skill | Experience | Education | |
| Verified | Skill | Experience | Education | |
|  Back | |  Save | | |

Clicking the expand button (+) will display the requirements for this position.


Applicant Verification 

Position: 7TH GRD MATH TEACHER **Applicant:** Briggs, James


License Information 

License Verification History



| Verification Date | License/Certificate | Issue Date | Expiration Date |
|--------------------------|----------------------------|------------|-----------------|
| <input type="checkbox"/> | California Drivers License | 9/10/2004 | 9/17/2004 |

Education Information 

| Verified | Degree | School | Major | Minor | Issue Date | GPA |
|----------|--------|--------|-------|-------|------------|-----|
|----------|--------|--------|-------|-------|------------|-----|

Skill Information 

| Verified | Skill | Experience | Education |
|--------------------------|--------|------------|-----------|
| <input type="checkbox"/> | 10-key | 30 | 0 |

 **Back**  **Save**

As staff verify the applicant's requirements, the percentage level for that applicant will increase.


1.1.2 The Public Pages

The Applicant Views are the screens within the AO system that are used for recruitment purposes. These screens include lists of current openings and detailed job description views. They also include the login screen, and all of the applicant information screens.

Active and Open Positions Screen

The Open Positions tab provides applicants with a basic list of open positions with hyperlinks to the Description page for that position. Applicants may view the detailed record for the positions that interest them with a click of a button. You can decide what information to include on this screen, but a basic example is show below.

[Home](#) [Open Positions](#) [My Information](#)



Open Positions

Use the Search Field to Locate Desired Positions



[Search](#)

| Position | Type | Posted | Closing |
|--|---------------|----------|-----------|
| Fire Fighter Ii | Fire Fighter | 3/1/1997 | 4/15/1997 |
| Clerk Ii | Clerical | 1/1/2000 | 1/31/2000 |
| Elementary Principal | Principal | 8/1/2003 | 10/1/2004 |
| Public Safety Sergeant | Public Safety | 1/1/2004 | 1/20/2004 |
| Science Teacher | Teacher | 1/1/2004 | 1/24/2004 |

[? Help](#)

The Position Description Page

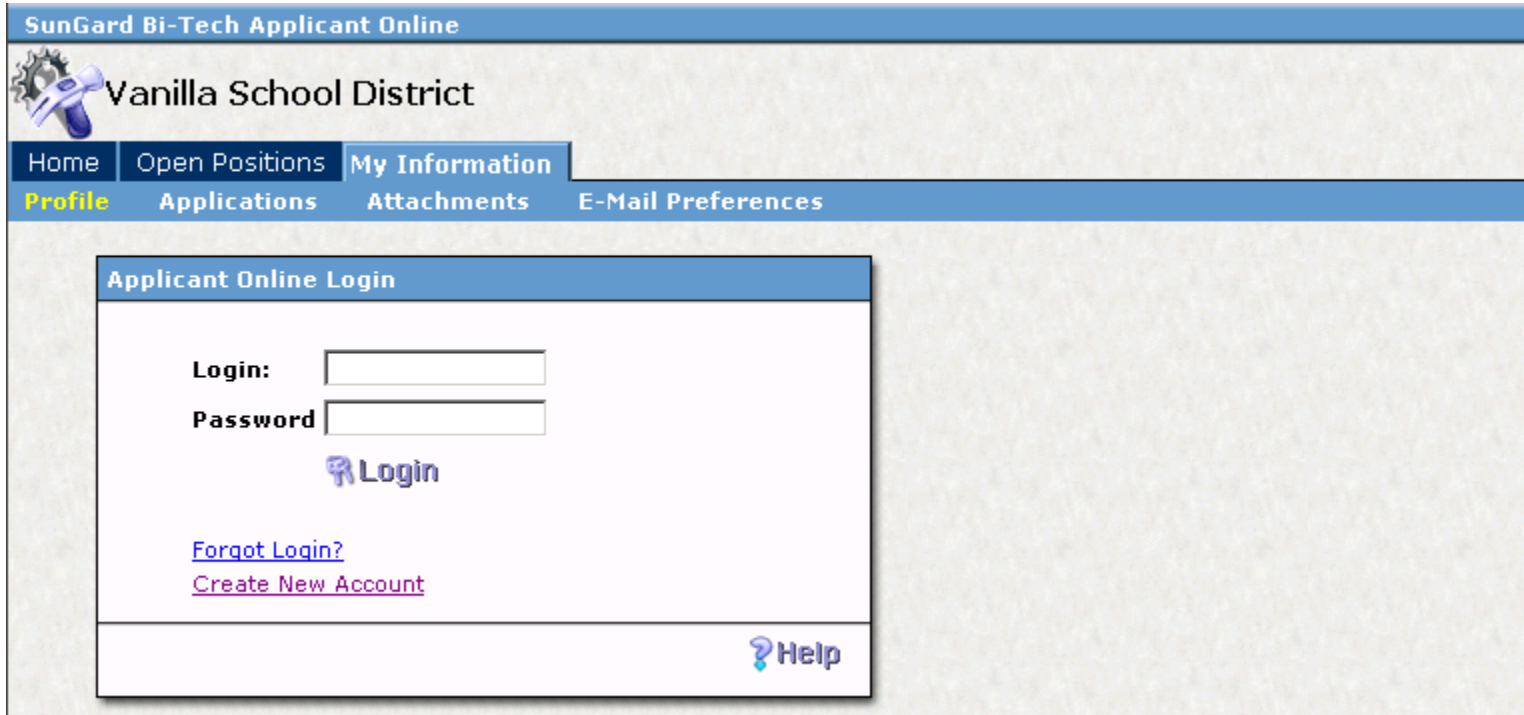
A sample position description is shown below. Note the view includes details about the position and the necessary qualifications. A link to the online help is included to provide the applicant with general information about this page and a back button is provided to enable applicants to navigate back to the Open Positions screen if they wish to look for other positions.

| Position Description  | |
|---|---------------------------|
| Job Title: Elementary Principal | Location: |
| Posted: 8/1/2003 | Closing: 10/1/2004 |
| Salary Range: \$75,000.00 - \$85,000.00 | |
| Job Summary: Hire, evaluate, and help improve the skills of teachers and other staff confer with staff to advise, explain, or answer procedural questions visit classrooms, observe teaching techniques, review instructional curriculum standards, develop mission statements, and set performance goals and objectives meet and interact with other administrators, students, and representatives of the community prepare budgets and reports | |
| Degree Requirements: Bachelors Of Arts | |
| Major Requirements: Elementary Education | |
| Skill Requirements: Spanish Speaking MS Office Supervisory Skills/Exper | |
| License Requirements: ESL Endorsed Spanish Teacher | |
| Hurdle Requirements: Background Check CPR Certificate Security Check | |
|  Back | |

The Login/Create Account Screen

The Login screen uses NUUPUS security to verify existing accounts and allows the applicant to create an account if they wish. It is launched when the applicant clicks the “Apply” button if they have not previously logged in. It may also be launched by clicking the Profile link on the “My

Information” tab. Existing users may login with a valid password and new applicants may click “Create New Account” to launch the Applicant Wizard.



The screenshot displays the 'SunGard Bi-Tech Applicant Online' interface for the 'Vanilla School District'. The page features a top navigation bar with 'Home', 'Open Positions', and 'My Information' tabs. Below this, a secondary bar contains 'Profile', 'Applications', 'Attachments', and 'E-Mail Preferences' links. The main content area is titled 'Applicant Online Login' and includes input fields for 'Login:' and 'Password:', a 'Login' button with a key icon, and links for 'Forgot Login?' and 'Create New Account'. A 'Help' link with a question mark icon is located at the bottom right of the login box.

SunGard Bi-Tech Applicant Online

Vanilla School District


Home Open Positions My Information

Profile Applications Attachments E-Mail Preferences

Applicant Online Login


Login:

Password

 Login

[Forgot Login?](#)

[Create New Account](#)

 Help

Applicant Wizard

The first step in applying for a position is creating an account. When the applicant has completed entering the login information, clicking “Create Account” will save the entry and immediately update your HR system with this information. The wizard will display the next screen the applicant is to complete.

Applicant Online Login

Name and E-Mail

First Name: **Last Name:**

E-Mail Address:


Login Information


Login:

Password:

Confirm:

Create Account

 **Back**

 **Help**

Name and Address Information Screen

The Name and Address screen are accessed via the My Information/Profile tab and is the second screen used for creating applicant profiles. After this screen is completed and saved, it will automatically be attached to the applicant's record the HR system.

The screenshot shows a web application interface with a navigation bar at the top containing 'Open Positions', 'My Information', 'Applications', 'Attachments', and 'E-Mail Preferences'. The 'My Information' tab is selected. Below the navigation bar is a header for the 'Name and Address Information' screen, which includes a 'Help' icon. The form is divided into two main sections: 'Name Information' and 'Address Information'. The 'Name Information' section includes fields for 'Login' (pre-filled with 'R32'), 'First Name' (pre-filled with 'r'), 'Middle Initial' (pre-filled with 'i'), 'Last Name' (pre-filled with 'j'), 'Social Security Number', and 'Preferred Name'. The 'Address Information' section includes fields for 'Address Line 1', 'Address Line 2', 'City', 'State' (a dropdown menu), 'Zip' (with a hyphen separator), 'Country' (a dropdown menu), 'Email' (pre-filled with 'A'), and three phone number fields: 'Phone Number1' (Home Phone, pre-filled with '(333) 333-3333'), 'Phone Number2' (Cell Phone, pre-filled with '(333) 333-3333'), and 'Phone Number3' (FAX NUMBER, pre-filled with '(444) 444-4444'). A 'Save' button is located at the bottom right of the form.

1.2 Key Features

1.2.1 IFAS: Applicant Online

Applicant Online is a Web-based human resources tool enabling job applicants to search, review, and apply for available openings via the Internet. Its features include powerful “back-office” components for processing applicant information without redundant data entry, as well as a variety of baseline Web pages for applicant data entry of educational background, skills, licensure, work experience, and references. In addition, Applicant Online supports the creation of custom data entry pages unique to site-specific needs and is fully integrated with the IFAS Human Resources system, thereby enabling real-time Internet postings as job openings become available. In tandem, Applicant Online and the IFAS Human Resource system streamline the entire hiring process, reduce data entry, and assure maximum recruiting exposure at your Web site.

System Features

- Post job openings to the Internet.
- Automatically score applicant information based on user-defined weighting factors.
- Score custom interviews based on user-defined values and weights.
- Define and perform a variety of user-defined Workflow operations (e.g. automatically notify applicants of new available positions, e-mail notification of forgotten login/passwords, etc.).
- Retain and use applicant data with subsequent applications, thereby reducing redundant data entry over time.
- Additional data entry pages can be added and customized to meet organization's unique requirements.
- 24-hour access.

Applicant Features

- Review position requirements and apply for positions online.
- Perform keyword searches on available positions.
- Attach relevant documents to a job application.
- Apply for multiple job openings.
- Receive automatic notifications of designated position openings.

HR Staff Features

- Review, approve, or reject applicant information.
- Assign applications with a status defined by their stage in the application process (e.g. "incomplete", "submitted", "in review", "completed", etc.). These statuses are dynamically ranked in columnar format to easily identify applicant progress in the review process.
- Identify top candidates by applicant rating reports based on user-defined application weights and aggregate scores.
- Review applicant summary reports displaying all of the data entered by each applicant for specific job openings.
- Note: Applicant Online captures online applications for review and central hiring decisions, but does not provide an automated mechanism for routing or reporting applicant information to support a distributed review and hiring process.

Requirements

- Applicant Online requires Imaging or Documents Online to function.

Symantec Compatible Technology Partner

SunGard Public Sector is a Compatible Technology Partner with Symantec. Applicant Online interfaces with Symantec's Antivirus software to provide safe resume and document uploads. The Symantec Antivirus product is not included with Applicant Online and must be purchased separately.

1.3 Getting Started

Under Construction

1.4 Basic Steps

Under Construction

1.5 Flow Diagram

Under Construction

2 Applicant Online Setup

2.1 Basics

2.1.1 Terms and Definitions

Under Construction

2.1.2 Concepts

AO Installation

Before You Begin

Update Services Version - If you do not have 7.9 running on your UNIX server you will require database and TRIAD updates to the 7.7 HFS in order for Applicant Online to function properly.

7i Server Setup - This document assumes that you have installed and configured 7i properly on the server prior to attempting to install and configure Applicant Online.

HR Applicant Tracking – Applicant Online directly interacts with the HR Applicant Tracking module. If you have not yet implemented this module in IFAS much of the setup needed for Applicant Online to function properly may be missing. Please be sure you have at least started your Applicant Tracking implementation prior to attempting to setup or run Applicant Online.

Installing the Application

First, if you are installing this product as part of a service pack, you will need to obtain a full install of the service pack version you are trying to install. To do this, contact the Helpdesk and request a new full install of the desired version. Otherwise, you will not be prompted to re-enter your Installation Code/Key and select “Applicant Online” from the product list.

Once the product is installed the majority of the configuration options should be defaulted. The following are configuration options that you can optionally override.

Connection – You can force Applicant Online to use a particular connection by adding the appropriate node to the “Connections” section of the web.config file. By default, the application will use the default connection on the server. Typically, this will be the first one in the connection list for the 7i server. This change would really only be necessary if there were multiple connections enabled on the server. It is recommended that you change only the Connection for the Home/Applicant web.config settings.

Product Name – If for some reason you would like Applicant Online to use a different product name you can override that value in the web.config as well. It is recommended that you change only the product name for the Home/Applicant web.config settings.

Attachment Restrictions – There are different options to restrict the type and size of attachment files for Applicant Online. Please consult the “Attachment Protection” portion of the user guide for additional details.

Browsing to the Site

The General Public view of Applicant Online resides in the /ifas7/home/applicant/public path on your 7i server (for example, **<http://server/ifas7/home/applicant/public>** (*<http://server/ifas7/home/applicant/public>* (<http://server/ifas7/home/applicant/public>)). Once you go to the site you can view the open positions defined in HR Applicant Tracking.

Home Page Customization

Once you have made sure the basic page works, you will want to proceed to customizing the Home Page. In most cases this will require the creating of custom Web parts to display your site specific information to the user. Please consult the “Home Page Customization” section of the user guide for additional information.

Forgot Login

In order to have the site e-mail an applicant their login if lost you will need to setup a workflow task to handle that. Please consult the “E-mail Login” section of the user guide for additional information.

Application Process

The actual job application is a very site-specific process. This will typically require custom development from SunGard Public Sector. In general this will entail creating custom application pages and then a workflow model to control their processing.

E-mail Alerts

Applicant Online also provides a method of allowing the applicant to subscribe to e-mail alerts. Please consult the “E-mail Preferences” section of the user guide for additional information.

Applicant Online Installations Steps

Note: the following instructions assume that you are running a version of the software compatible with Applicant Online and that you have a fully operational 7i Server. It is also required that the HR Applicant Tracking is installed and configured prior to installing Applicant Online. This software also requires the Microsoft .Net Framework (version: 1.1) be installed properly on the server.

Steps to be Completed for Each Connection

The following steps should be applied to the Connection Manager connection to be used with Applicant Online.

Open the System Administrator (BTAdmin) and for the connection you intend to use for Applicant Online enter a valid User ID and Password in the “7i Portal” section of the App User Tab on the connection properties. Note: this user must have the ability to view and update HR Applicant Tracking tables as well as access to update the ROOTDB tables in Nucleus.

Open the Workflow Designer and Load the “default” AO Application Workflow Model (the Forgot Login model) from the Install CD. See section 6 and 8 of the Applicant Online User Guide for more information about these workflow models. It is very likely that after loading the workflow models you will also need to set the “WHO” on each of the activities in those models.

Create the Imaging Attachment Definition for Applicant Online. See the Applicant Online section for more information.

Create the Applicant Online Identity Association Common Code. See the Common Code Guide for more information. Note: it is very important that the Code Category, Code Value and Short Description match the documentation.

Create the desired e-mail alerts Common Codes. Note: it is very important that the Code Category and Short Description match the documentation.

Steps to be Completed for Each 7i Server

The following steps should be applied to each 7i server that will be used for Applicant Online.

Run the setup.exe from the Install CD and be sure to select “Applicant Online” from the setup options.
Setup Web.config settings on the server.

Locate the web.config file for 7i. (usually in c:\inetpub\wwwroot\ifas7) This file can be edited with notepad.

If more than one connection is available to this 7i Server you should set the Connection Name to be used for Applicant Online. (Applicant Online will only work for one connection on a server at a time.)

Set the Nucleus Default settings for Applicant Online to use in creating Nucleus Users. (OPTIONAL) Setup the Virus Scanning and Attachment Size limit for Applicant Online.

Considerations for Public Kiosk Usage

In the event that Application Online will be made available in a kiosk (e.g., a PC and Browser available to the general public) please ensure that the browser is run in kiosk-mode (this is the -k command line switch in Internet Explorer) to ensure that integrity of the browser and machine settings as well as to disable the built-in AutoComplete feature in Internet Explorer.

3 Applicant Online Reference

3.1 Processing

3.1.1 Creating AO Login Documentation

When an applicant creates their account in Applicant Online, a new entry is made in the us_usno_mstr with their information. However, since there are more required fields on that table than we request from the applicant there is logic necessary to fill in the gaps.

By default, the system uses the ususnomaster.vbs file's settings by checking for the Application name of "7iPortal". The application uses a user and password defined on the "App User" tab of the connection properties. Some of the values from the App User defined on that tab are also used as defaults for the Applicant User. Since the defaults are set in the InitNew process they are technically only the default values for the fields. Therefore, if a particular page sets them prior to an update the new values will overwrite the defaults.

In order to specify values other than those in the .vbs file, the user can also place values in the web.config AppSettings section of that application. The following is an example of setting those values:

```
<appSettings>

    <add key="UsnoDesc" value="Applicant Online User"/>

    <add key="UsnoLocCd" value="BI_TECH"/>

    <add key="UsnoMgrCd" value="DBA"/>

    <add key="UsnoHrsCd" value="@@"/>

    <add key="UsnoLpPrinters01" value="TERMINAL"/>

    <add key="UsnoFpPrinters01" value="TERMINAL"/>

</appSettings>
```

Common Code

All Applicant Online users will need the “APPLY” Nucleus Association.

Code Category: NUAS

Code Value: APPLY

Short Description: IDENTITY

Medium Description: Applicant Online

3.1.2 AO Attachment Setup Notes

Applicant Online requires SunGard Public Sector's Documents Online software for managing images. Image Attachment Definitions are established in Administration Console. Select "Attachment Definitions" under the Setup menu of the Admin Console. Refer to the Documents Online guide for more information.

Applicant Online Attachment Protection

In order to prevent the general public from uploading destructive or inappropriate files to Applicant Online, the following protection items are available with the product.

File Upload Restrictions

Applicant Online supports two different file upload restrictions.

1. **File Size Limit** – The site can limit the maximum allowable file size that may be uploaded. Value in the Web.Config file is in kilobytes. If this setting is missing or has a value of 0 (zero) the page will allow files of any size to be uploaded.
2. **File Extension Restriction** – This is a comma separated list of file extensions that will be allowed to upload. If this value is missing or blank, the page will allow files of any type to be uploaded.

Applicant Online Virus Scan

Applicant Online uses the Symantec Anti-Virus Scan Engine

(<http://enterprisesecurity.symantec.com/products/products.cfm?ProductID=173&EID=0>)

(<http://enterprisesecurity.symantec.com/products/products.cfm?productid=173&eid=0>)

(<http://enterprisesecurity.symantec.com/products/products.cfm?productid=173&eid=0>))) to scan attachments before they are passed to the Imaging Attachment process. Please consult the Symantec documentation on this product for installation and setup instructions. Because the product is network accessible, it only needs to be installed on one server. Once the product is installed, licensed, and configured, all that Applicant Online needs is the server name (or IP Address) of and the port number that the scan engine is listening on.

Virus Scanning Considerations

If the server running the Scan Engine already has a Virus Scanning Client, the client will need to be configured to skip the temp directory used by the Scan Engine. The directory location can be found on the “Resources” tab of the Scan Engine Configuration menu. This will prevent the Virus Scanning client from quarantining temp files used by the Scan Engine for virus scan processing.

Web.Config example

```
<!--Applicant Online-->

<location path="Home/Applicant">

  <appSettings>

    <add key="ProductName" value="SunGard Public Sector Applicant Online"/>

    <add key="AttachmentExtensions" value="doc, txt, rtf, jpg, png"/>

    <add key="AttachmentFileLimit" value="4096"/> <!--4 Megs-->

    <add key="SymantecScanServer" value="scanserver:1344"/>

  </appSettings>

</location>
```

If the Web.Config file is used to set these values the equivalent files on all servers in the Web farm should be updated as well.

Example Output

File Limit

View Attachments

Help

New Attachment

Description:

Resume

Attachment:

MISC DOC

Local File:

File Upload Failed! Reason: File Exceeds Upload Limit

Browse...

Add

File Extension Limit

View Attachments

Help

New Attachment

Description:

Resume

Attachment:

MISC DOC

Local File:

File Upload Failed! Reason: File Type is not allowed.

Browse...

Add

Virus Found

View Attachments

Help

New Attachment

Description:

Test

Attachment:

MISC DOC

Local File:

File Upload Failed! Reason: File has been found to be infected with a virus. Virus Name: W97M.VMPCK1.gen

Browse...

Add

3.1.3 AO E-mail Preferences

Common Code Setup

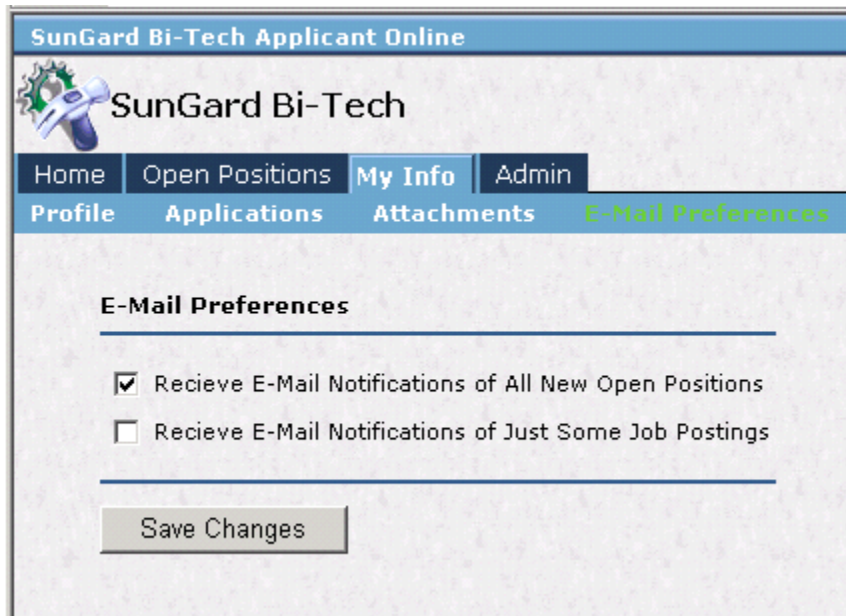
E-mail Preferences are created by adding NUAS common codes to NUUPCD. The only requirements are that the Code Category is “NUAS” and the Short Desc is “AOEMAIL”. The Long Desc field is the description shown to the Applicant and the Medium Description is the one shown on the Associations tab of NUUPUS and the tooltip on the checkbox control shown to the Applicant.

| | | | | | |
|----------------|---|-------------|------------------------------------|---------|---------------------------------|
| Code Category: | <input type="text" value="NUAS"/> | Code Value: | <input type="text" value="AOALL"/> | Ledger: | <input type="text" value="00"/> |
| Short Desc: | <input type="text" value="AOEMAIL"/> | | | | |
| Medium Desc: | <input type="text" value="All Open Positions"/> | | | | |
| Long Desc: | <input type="text" value="Recieve E-Mail Notifications of All New Open Positions"/> | | | | |

| <u>Associated Numeric Values</u> | <u>Associated Codes</u> | <u>Associated Descriptions</u> |
|----------------------------------|-------------------------|--------------------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Applicant Interface

The E-mail Preferences page presents the user with a checkbox control for each preference and a button allowing them to save changes to their e-mail preferences.



The screenshot shows the 'SunGard Bi-Tech Applicant Online' interface. At the top, there is a blue header bar with the text 'SunGard Bi-Tech Applicant Online'. Below this is a logo for 'SunGard Bi-Tech' featuring a stylized green and blue gear-like icon. A navigation bar contains several tabs: 'Home', 'Open Positions', 'My Info', and 'Admin'. Below the navigation bar, there is a sub-navigation bar with tabs: 'Profile', 'Applications', 'Attachments', and 'E-Mail Preferences' (which is highlighted in green). The main content area is titled 'E-Mail Preferences' and contains two checkboxes: 'Recieve E-Mail Notifications of All New Open Positions' (which is checked) and 'Recieve E-Mail Notifications of Just Some Job Postings' (which is unchecked). At the bottom of the form is a 'Save Changes' button.

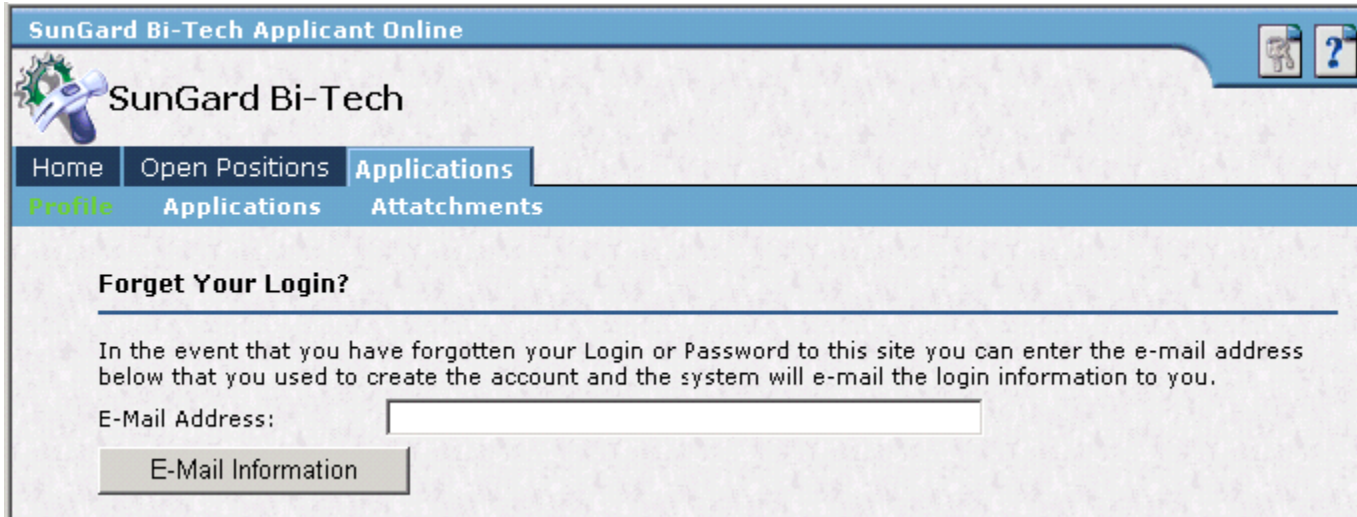
Workflow Notification

In theory, the e-mail notifications will be handled by a Workflow model attached to the Insert of HR_REQPOST entries. The model will handle the process of identifying users who wish to be notified and sending them the e-mails.

E-mail Login

The E-mail Login page for Applicant Online allows the applicant who may have forgotten their login to have the password changed and the new password E-mailed to the account they used to create the login.

From the main login page there is a link “Forgot Login?” that will take the applicant to a page under the Applicant/Public directory named ForgotLogin.aspx.



SunGard Bi-Tech Applicant Online

SunGard Bi-Tech

Home Open Positions **Applications**

Profile Applications Attachments

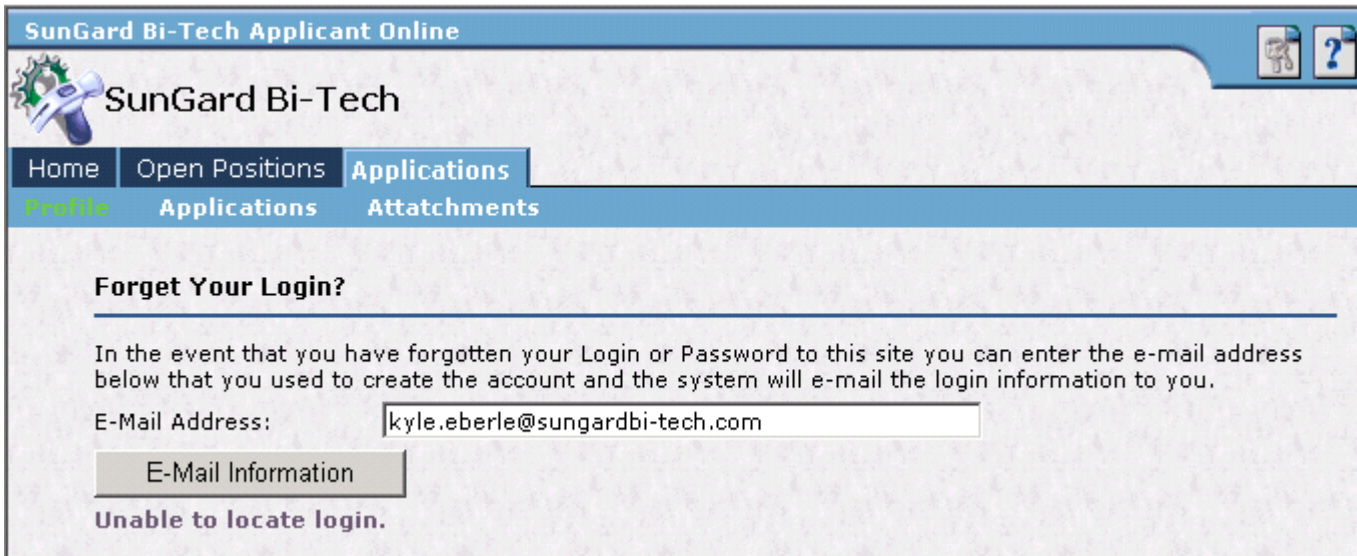
Forgot Your Login?

In the event that you have forgotten your Login or Password to this site you can enter the e-mail address below that you used to create the account and the system will e-mail the login information to you.

E-Mail Address:

E-Mail Information

They must enter in the same E-mail address that they used to create the login. The search is not case sensitive. If the E-mail address is not found the user will get an error message on the screen.



SunGard Bi-Tech Applicant Online

SunGard Bi-Tech

Home Open Positions **Applications**

Profile Applications Attachments

Forgot Your Login?

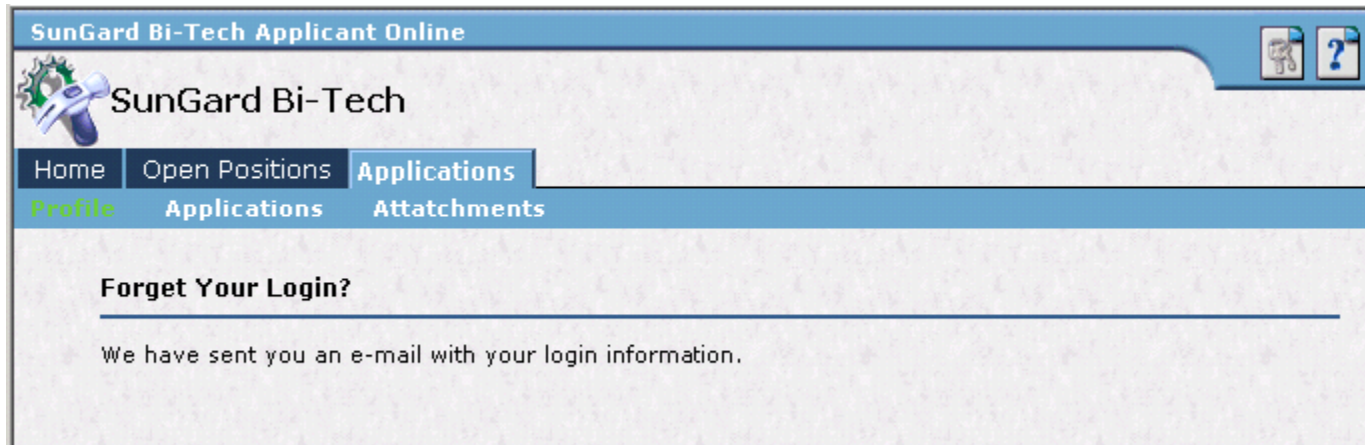
In the event that you have forgotten your Login or Password to this site you can enter the e-mail address below that you used to create the account and the system will e-mail the login information to you.

E-Mail Address:

E-Mail Information

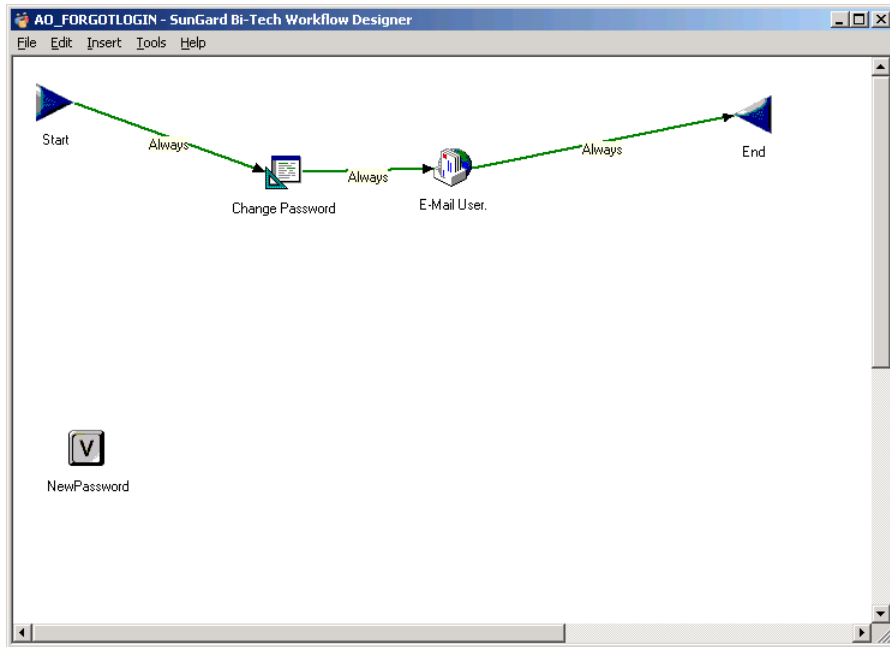
Unable to locate login.

If the login is found the user will be informed that they have been sent an E-mail.



If the login is found, a Workflow event will also be triggered with an Event ID of "AO_EMAIL", the creator based on the BT20.USUsnoMaster entry for that user and the UniqueKey from their record. A Workflow model on the client's system should be set to listen for that event and act accordingly.

Example Workflow Model:



Example Change Password Workflow Script:

-----Begin Example-----

First create a new random (generally speaking) password

Randomize

Dim Pwd

Dim lowerbound, upperbound

lowerbound = Asc("A")

upperbound = Asc("Z")

Function RandomCharacter

RandomCharacter = Chr(Int((upperbound - lowerbound + 1) * Rnd + lowerbound))

End Function

Pwd = RandomCharacter

Pwd = Pwd & RandomCharacter

Pwd = Pwd & RandomCharacter

Pwd = Pwd & RandomCharacter

Pwd = Pwd & CInt(Rnd * 10000)

'Load up the User's UsUsnoMaster entry

dim USUsnoMaster

set UsUsnoMaster = createobject("BT20.USUsnoMaster")

UsUsnoMaster.No = Source.No

Dim result

result = UsUsnoMaster.ReadByKey()

'Set the Variable for NewPassword to the new password (for later E-mail purposes)

Variables.NewPassword = Pwd

'As long as this isn't a NOPW entry change the password

If UsUsnoMaster.Pw <> "NOPW" Then

 UsUsnoMaster.Pw = Pwd

 UsUsnoMaster.UpdateRec()

End If

-----End Example-----

Resulting E-Mail

For now there is no Custom Text option in Workflow so the E-mail that you will receive in testing looks something like this:

-----Example E-Mail-----

WORKFLOW Information

You forgot your login!

Description:

No=1949

UsId=KETEST3

Name=Eberle, Kyle

NameU=EBERLE, KYLE

Desc=7iPortal User

LocCd=BI-TECH

MgrCd=DBA

HrsCd=@ @

Pw=*****
PwExpLen=0
PwDt=2/26/2004
TermCd=HP
PwTimeout=0
Timeout=120
Email=KYLE@BI-TECH.COM
Ldev01=0
Ldev02=0
Ldev03=0
Ldev04=0
Ldev05=0
Ldev06=0
Ldev07=0
Ldev08=0
Ldev09=0
Ldev10=0
MaxJobPri=08
LpPrinters01=TERMINAL
LpPrintPri01=8
LpPrintPri02=8
LpPrintPri03=8
LpPrintPri04=8
LpPrintPri05=8
LpDefPri=8
FpPrinters01=TERMINAL
FpPrintPri01=8
FpPrintPri02=8
FpPrintPri03=8
FpPrintPri04=8
FpPrintPri05=8
FpDefPri=2
LastJobDt=2/26/2004
LogFlag=Y
LogDays=0
MiscFlags02=Y
MiscFlags03=Y

MiscFlags04=Y
UniqueKey=1EC2591F-234F-458D-888F-BBF2060B1A16
ExpertMode=0
ScheduleJobs=-1
AllowPassword=-1
PermitInteractive=-1
ForceMpeEqUserid=0
AllowIqJumping=0
AllowPostedFiles=0
AllowUpdatePosted=0
JobQOverride=0
HfsLoad=0
NewPassword = CYPK2937

Who : Eberle, Kyle
Status : Yes
When : 3/3/2004 2:12:07 PM

User=KETEST3
Model=AO_FORGOTLOGIN
Activity=A2
Key=1EC2591F-234F-458D-888F-BBF2060B1A16
Version=1

-----End Example-----

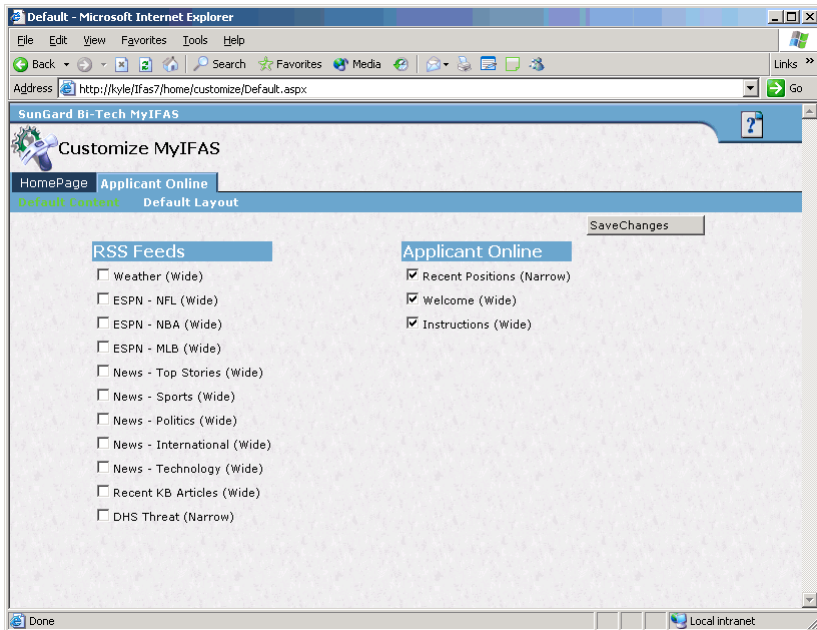
Note the “NewPassword” variable at the end of the “Description:” list of data items. That contains your new password. If the client needs a password generator more complicated than the one in the example script they should be able to develop one from the VBScript language features.

3.1.4 AO Home Page Customization

The Home Page for Applicant Online is customizable by site. This is different than the home page for the Dashboard which is both site and user customizable.

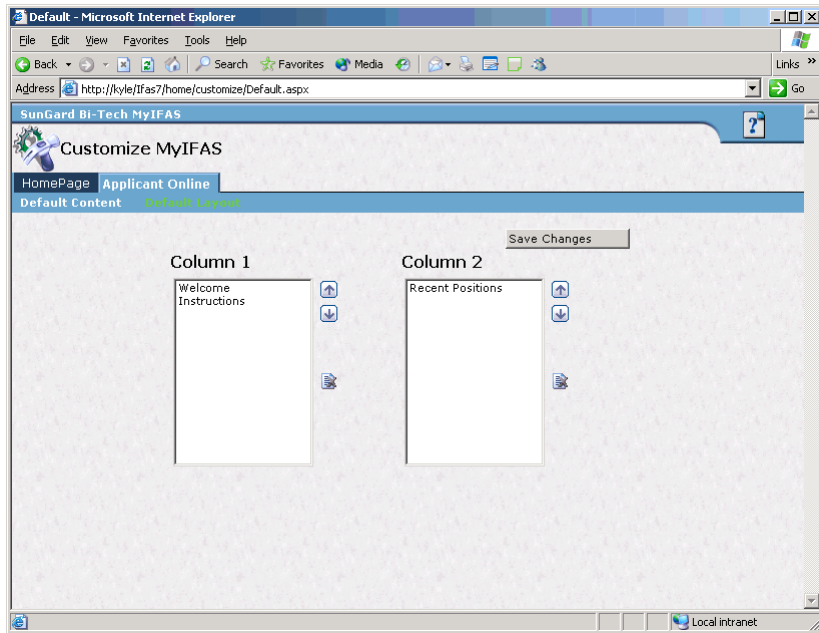
By default, the Home Page is loaded based on the xml home page install defaults. These are located in HomePage.xml in the Applicant directory on the server. However, sites will not be customizing this file. This is only used to provide an install default for the page.

To customize the Home page for Applicant Online, browse to the Customize page for the Portal software (**<http://server/ifa7/home/customize>** (**<http://server/ifa7/home/customize>**)) and choose the Applicant Online tab.

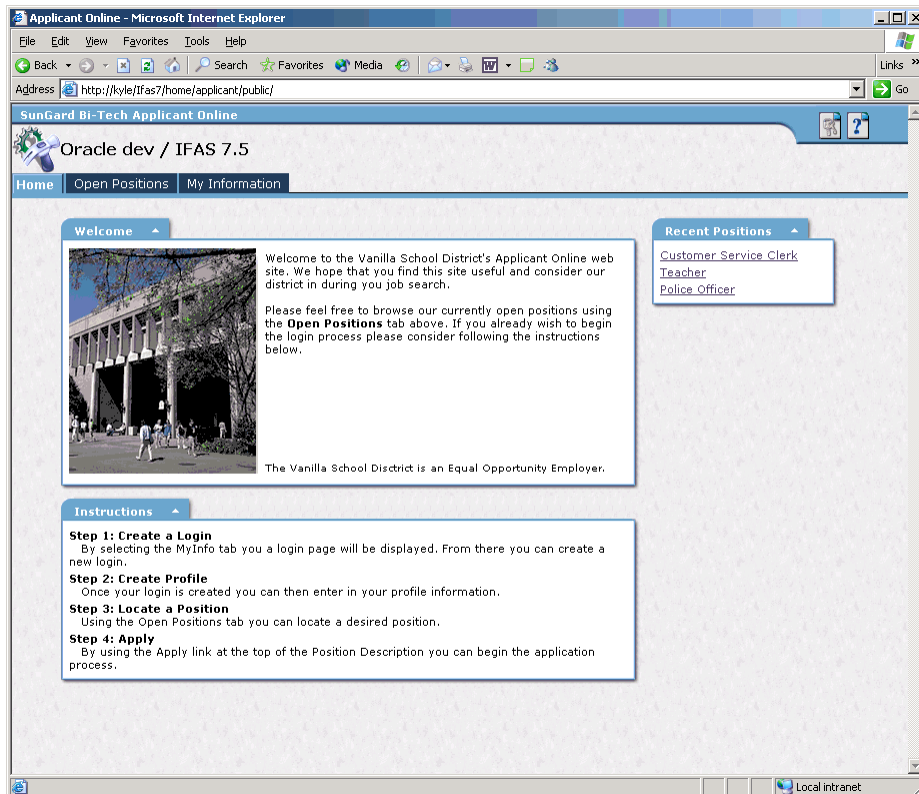


This page works just like the Default Content menu option on the HomePage tab. The items selected here will appear on the Applicant Online Home Page. The Content Groups shows on this page are those created with an identity of either “PUBLIC” or “APPLY” (there is no point in showing the others since they aren’t available to applicants).

Once the content items are selected and the user chooses “Save Changes” the layout can be set using the “Default Layout” menu option for this tab.



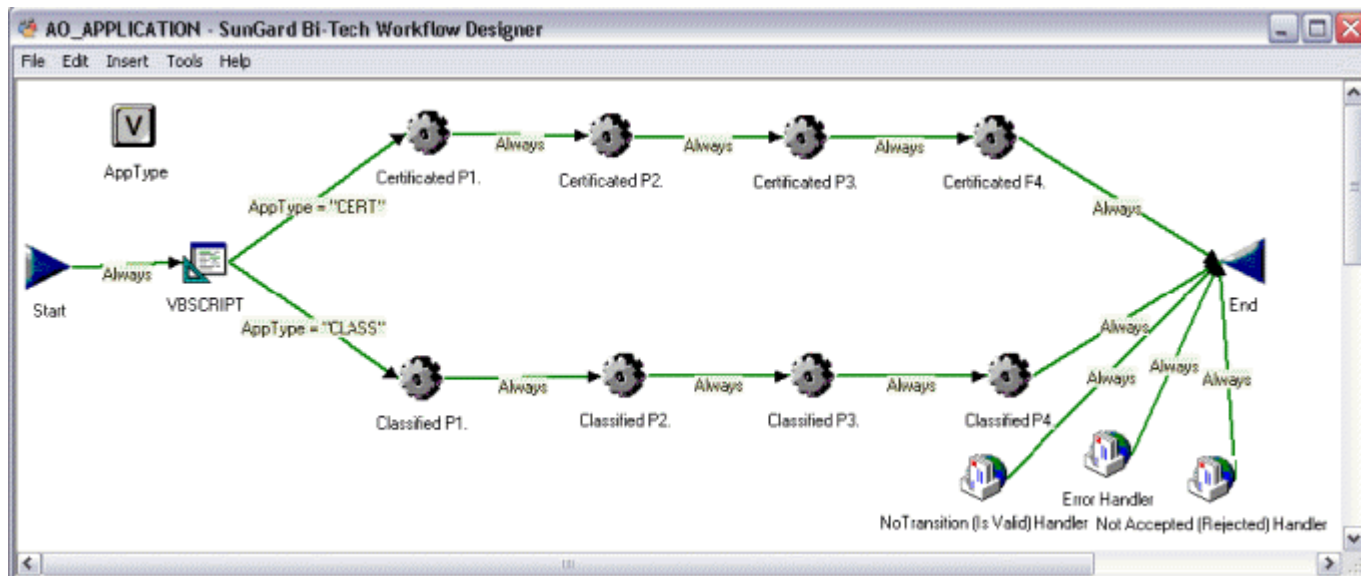
The “Column 1” items are those content items flagged with a “WIDE” size. The “Column 2” items are those content items flagged with a “NARROW” size. Once the layout is set and the user chooses “Save Changes” the Applicant Online Home page will be set.



3.1.5 AO And Workflow on Demand

The Basics

This new process provides the ability to create a Workflow model that can be used to control the flow of Web pages that are displayed in Applicant Online's application wizard. Once the model is setup correctly, two 7i requests are used to run and update the Workflow instance. One thing to note is that Workflow On Demand (WOD) instances are not processed by the Workflow Engine. They are processed purely by 7i's btmqhosts. Below is a sample model. WOD will have other applications, this just covers the use for AO.

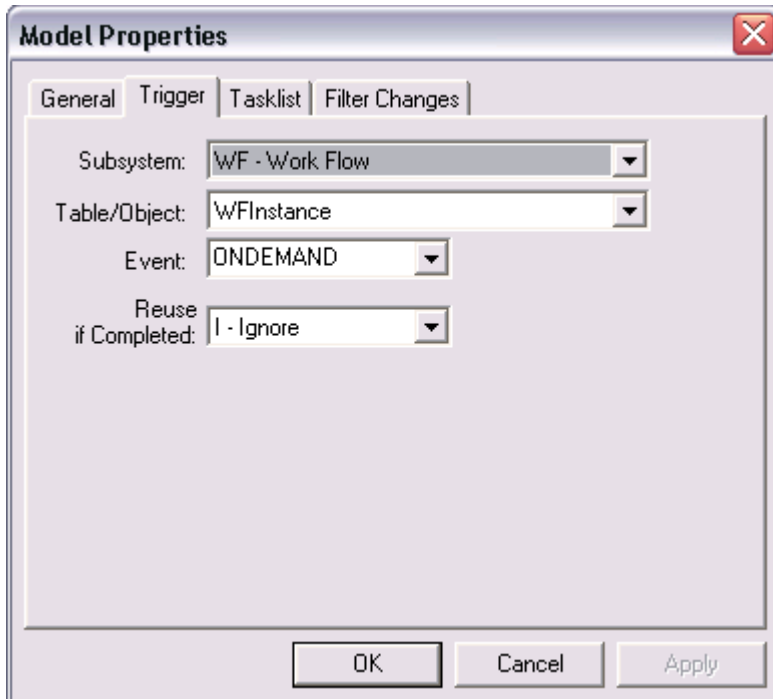


This sample model handles two different types of job applications. The VBScript activity at the beginning chooses the application type depending on which application the user has requested from the portal Web pages. It then sets a user variable called 'AppType' to control which set of Web pages are displayed in the AO application wizard. If only one application is used, then just the process nodes are necessary. If more are necessary, they will be added, stemming from the VBScript activity. It is not possible to cross paths of job applications using the same set of Web pages. Each path has to list the Web pages in order from start to finish.

Setup

The WOD (Workflow On Demand) model requires a different triggering event to be chosen than other typical models. The default of ONDEMAND (available from the drop-down) should be used. Any name can be used for the event, but will require asp.net changes in AO to accommodate. In the

sample below, the table wf_instance is used, but would typically be the ao_appication table for AO. The description from the “General” tab here will be used as the job application name in the AO application wizard.



The image shows a 'Model Properties' dialog box with a red close button in the top right corner. It has four tabs: 'General', 'Trigger', 'Tasklist', and 'Filter Changes'. The 'General' tab is selected. Inside the 'General' tab, there are four dropdown menus: 'Subsystem' set to 'WF - Work Flow', 'Table/Object' set to 'WFInstance', 'Event' set to 'ONDEMAND', and 'Reuse if Completed' set to 'I - Ignore'. At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

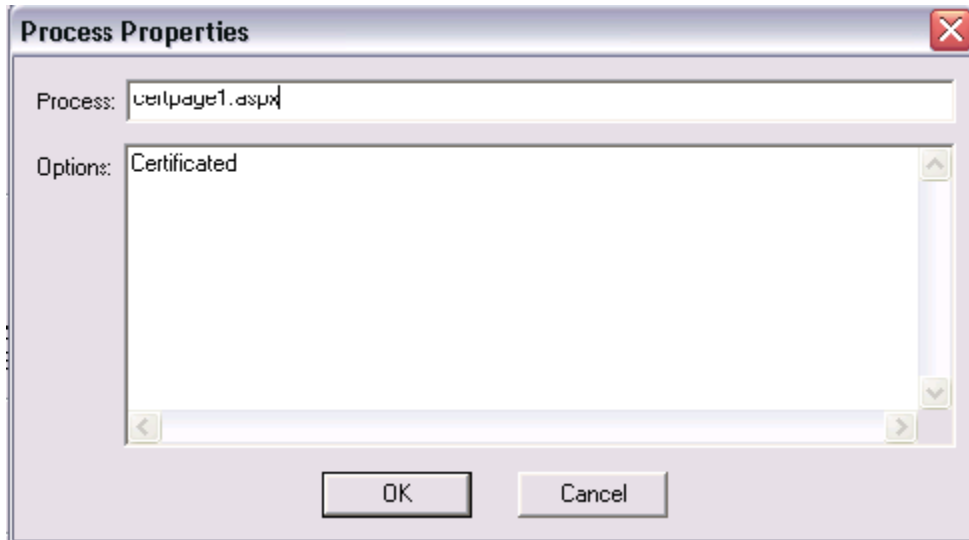
| Property | Value |
|--------------------|----------------|
| Subsystem | WF - Work Flow |
| Table/Object | WFInstance |
| Event | ONDEMAND |
| Reuse if Completed | I - Ignore |

The rest of the model is straightforward. Each Web page is listed in the individual process activities. It is **EXTREMELY** important to make sure the “Send even if previously notified” box is checked after choosing the action to be “Process”. If you do not do this, the model will fail and not stop at each listed Web page. If this option is not available for the process action in your designer, your designer will need to be upgraded. All activities proceeding the first process node will need this same box to be unchecked so they will process and stop on the first Web page.

The screenshot shows the 'Activity Properties' dialog box with the 'General' tab selected. The 'Who' section has 'Rule' selected with 'Workflow Sec C1' in the dropdown, and the checkbox 'Send even if previously notified' is checked. The 'Action' dropdown is set to 'Process'. The 'Expiration Handling' section shows 'Wait' set to '2' hours and 'After Expiration' set to 'Exp. Failure'. The 'When' section has 'Each Change in Data' selected. The 'Reset Address' dropdown is set to 'No change in address'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Also, to meet internal Workflow requirements, each activity must be associated with a Person or Role. We suggest you create a Workflow OnDemand User in NUUPUS and use this Person for each activity.

Below is a sample, the Process is the Url of the local page in AO and the Options edit box contains the description/title of the Web page.



Execution

The AO Application Wizard executes the below requests and gets back the listed responses. The initial "LIST" request will create a new wf_instance record if one doesn't already exist for the triggering data unique_key. It will also process the instance once which will create the wf_history records that will be returned as the Web page list. The TriggeringData UniqueKey is that of the record that will be tracked, in AO's case, that of an ao_application record. Once the instance is created, it will carry a wf_engine name of 'ONDEMAND' so as not to be picked up by the WF engine for processing.

```
--Request--
<sbixml>
  <NetSightMessage>
    <Header>
      <Connection>dev_ross</Connection>
      <UserID>KURT</UserID>
      <CurrentLedgers GL="GL" JL="JL"/>
      <Trace Enabled="0"/>
    </Header>
    <Request Type="WorkflowOnDemand">
      <WorkflowOnDemand Action="LIST">
        <workflow_request>
```

```

    <EventId>ONDEMAND</EventId>
    <TriggeringData UniqueKey="C1C268C4-FE6E-487A-9671-408B199FB010"/>
    <BT20ObjectName>BT20.WFInstance</BT20ObjectName>
  </workflow_request>
</WorkflowOnDemand>
</Request>
</NetSightMessage>
</sbxml>

```

The status on the response will be 'P' for pending, which will be the current Web page the AO wizard is on. The status marked 'Y' means yes, for already executed. The status 'F' means future and will be visited after the pending record has been updated to 'Y' by the next 'POST' request (example next). The below response shows that we are currently on claspage3.aspx.

--Reponse--

```

<sbxml>
  <NetSightMessage>
    <TraceOutput/>
    <Header>
      <Connection>dev_ross</Connection>
      <UserID>KURT</UserID>
      <CurrentLedgers GL="GL" JL="JL"/>
      <Trace Enabled="0"/>
      <ProcessTime WaitInQueue="0" PreProcessMessage="20" ProcessMessage="260"
        TotalTimeToResponse="280">3/16/2004 10:29:35 AM</ProcessTime>
      <MachineName>kurt.chico.bi-tech.com</MachineName>
      <QueueInfo AvailableThreads="2" ExistingThreads="3"
        ThreadId="3444">Screens_high</QueueInfo>
    </Header>
    <Response RequestType="WorkflowOnDemand">
      <wf_histories Description="Applicant Certificated">
        <wf_history Url="classpage1.aspx" Status="Y" UrlParms="Classified "
          UniqueKey="B3C9345D-D1EC-4C00-86D3-1AD067117608"/>
        <wf_history Url="classpage2.aspx" Status="Y" UrlParms="Classified"
          UniqueKey="715B55C7-784B-4765-956F-E79AA5A3133C"/>
        <wf_history Url="classpage3.aspx" Status="P" UrlParms="Classified"
          UniqueKey="653D9EE7-F707-4215-85C7-DCBB843254F5"/>
        <wf_history Url="classpage4.aspx" Status="F" UrlParms="Classified"
          UniqueKey="CEF499A1-17F6-4428-B941-3D8B56879486"/>
      </wf_histories>
    </Response>
  </NetSightMessage>
</sbxml>

```

```
</wf_histories>
</Response>
</NetSightMessage>
</sbixml>
```

The 'POST' request is used to tell workflow that the AO wizard is done processing the current page and to update the histories. The unique_key of the history that was provided with the 'LIST' response is required for the 'POST' request's update.

--Request--

```
<sbixml>
<NetSightMessage>
<Header>
  <Connection>dev_ross</Connection>
  <UserID>KURT</UserID>
  <CurrentLedgers GL="GL" JL="JL"/>
  <Trace Enabled="0"/>
</Header>
<Request Type="WorkflowOnDemand">
  <WorkflowOnDemand Action="POST">
    <workflow_request>
      <action>Y</action>
      <history_unique_key>653D9EE7-F707-4215-85C7-DCBB843254F5</history_unique_key>
      <TriggeringData UniqueKey="C1C268C4-FE6E-487A-9671-408B199FB010"/>
    </workflow_request>
  </WorkflowOnDemand>
</Request>
</NetSightMessage>
</sbixml>
```

--Response--

```
<sbixml>
  <NetSightMessage>
```



```
<TraceOutput/>
<Header>
  <Connection>dev_ross</Connection>
  <UserID>KURT</UserID>
  <CurrentLedgers GL="GL" JL="JL"/>
  <Trace Enabled="0"/>
  <ProcessTime WaitInQueue="0" PreProcessMessage="110" ProcessMessage="2503"
    TotalTimeToResponse="2613">3/16/2004 11:29:33 AM</ProcessTime>
  <MachineName>kurt.chico.bi-tech.com</MachineName>
  <QueueInfo AvailableThreads="2" ExistingThreads="3"
    ThreadId="3444">Screens_high</QueueInfo>
</Header>
<Response RequestType="WorkflowOnDemand">success</Response>
</NetSightMessage>
</sbixml>
```