HIRING WITHOUT BOUNDARIES™

⑤ Smart Recruiters

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System FYIs / Tips / Limits

This is a reference for known workarounds, tips, "gotchas" and limits that your clients will experience in implementation and their use of the system post go-live.

Configuration

- **Job Creation**
  - Description/Detail Fields
    - FYI User experience: The Company Description pre-fills per user - *i.e., Sally creates a job using a new company description, next time she logs in this same description pre-fills. Billy logs in, sees the company description <u>he</u> last used, not the new one Sally created. *This is In the case of not using a template*
    - Character limitation on job description/qualifications/additional information fields: we don't have a known character limit on these fields, but based on past data imports of jobs, we truncate job ads to 9000 characters, corresponding to about 4500 words. We are limited to 10000 bytes of data via API
    - Special characters: SR does not prevent usage of special characters. However job boards will flag a lot of them as spam (I.e. ******).
    - The job advertised to LinkedIn has to has at least 100 characters in section Job Description in order to be delivered to LinkedIn
  - Custom fields do NOT save in template
  - Limit of 25 org fields incl. Standard ones Brand, Country, Department, ie. 22 custom org fields
  - 200 Job fields - including active and archived.
  - 200 character limitation in job/org field label name
  - Active values you can add to each job field - 10,000
  - Total values you can add to each job field to 12,000
  - Free Text format: 299 characters.
  - Scorecard DOES save in template
  - Unpublish date field (if activated in SmartLabs): only the date shows but the exact timing of the depublication is 12.00.01 am per the creators Device clock.
  - Comments box for approvals is limited to 9800 characters (including spaces)
  - Limit of positions per job is 100 max.

- **Hiring Process**
  - Custom hiring team roles do not get the all email company settings
  - A maximum of 120 hiring processes can be created.
  - Workflows now have a toggle setting for required. If a candidate is put back prior to that required step in the process, they will have to go through the required step again.
  - Main statuses are assigned automatically:
    - In Review - when reviewing a candidate or emailing a candidate
    - Interview - when inviting for interview
    - Offer - when offer is created
    - Hired - when hired
    - *the main statuses are automatically made visible to the candidate on the candidate portal
    - *Candidate sees job under Archived after being rejected
  - "Lead status" can be assigned in 5 cases

- Manually added candidate
- LinkedIn recruiter import of candidate (sync)
- Referral
- Candidate submitted by Agency
- Move candidate to another job
- *basically, any way a candidate ended up on a job, without actually applying themselves

- **Interview Scorecards**
  - Limit of 10 questions per criteria
  - Limit of 80 criteria per job
  - Feedback characters limit: 20 000 characters
  - Best practice: as users can delete criteria, training point
  - Best practice: prepare your list of criteria before entering them on the platform as you cannot edit the criteria label once entered - in a global context, better to work on a list with a country code against each criteria to make the search easier (and differentiate your criteria from the SR standard ones)

- **Approvals**
  - Tip: if you set up a chain without setting up any chain type, it allows you to create the chain at job creation
  - "Any user" cannot have duplicates of the same user in a chain
  - Approvers are granted full access to the jobs and candidates But this can be changed in setting so they do not see the job or candidate after they approved or declined.
  - No capability of reminders currently
    - Only notification is initial via email - not in platform (comes with July Release, 2020, visible on home page)
  - Email format cannot be changed (<notifications@smartrecruiters.com>)
  - User has to have logged in to show up as an approver or account must have been activated via API/mass upload.
  - Client needs full customization- Approvals API integration is an option, avg cost 20k plus 7200 annual hosting fee
  - Offer Approval: Approval not required for hire, can still move to hired
  - Comments box for approvals is limited to 9800 characters (including spaces)
  - Currently no limitation for the amount of approval processes (but at some point it will start impacting the system performance)

- **Email Templates**
  - Interview invitations: merge field 'Event_Start_Time' includes date + timing + time zone.
  - Consent Email templates: language versions are triggered per Job location

- **Auto Reply**
  - Non standard auto reply messages are assigned by org-fields. Job location does not belong to it, important for multi language job ads.

- **Candidate Fields**
  - When deleting candidate fields you can only retrieve them through the APIs
  - Up to 500
  - Many are created but suppressed/pre-built fields. Use type to search to see if the field is already there and would fit the need
  - Once created, the field label cannot be updated
  - You cannot create two fields with the same label, even if the field type is different: if you created a field with the wrong format, you need to be creative to create it again under the right format, adding a space or using a different upper/lower case label.
  - The order you set in configuration reflects on the Offer page according to this rule: 1) offer fields, order of the template 2) offer form fields, order in the settings
  - Free text - 20,000 characters
  - Free text characters that are not accepted:
    - <
    - >
    - \
    - |
    - ~
    - `
    - ;
    - {
    - }
    - ¨
    - ∞
    - ¬
    - ÷
    - ≠
    - '
    - ^
    - „
  - Dropdown - 1000 values, 1000 characters per value
  - Fields that need to be used as merge fields in an offer template cannot start with a number, the merge field will not work.
  - Date format will only display dd/mm/yyyy or mm/dd/yyyy format on the offer letter - if you need a date in full, opt for a text field format...
  - Fields will be displayed in the following order:

- If a candidate field is not displayed in any of the places (candidate profile, Offer form, New Hire Form), but is a merge field in the Offer Template = it will be displayed at the top of the list and not aligned with other candidate fields (only for default fields)
- Candidates fields displayed in the Offer form and in the Offer Templates will be displayed at the top following the order they are configured in the Offer templates.
- Job/Org merged fields in Offer Templates will be displayed after the candidate fields merged fields in the Offer templates. Their order follows the order in the merge fields list.
- Other candidate fields displayed in the Offer form but are not used as merge fields in the Offer templates, then follow in the order configured in the Settings whether they are mandatory or not.
- If the candidate field is displayed on both Offer tab and New Hire form (whether it is a merge field or not in offer template), the user will be able to fill it only once, in the Offer tab.
- If the candidate field is displayed on the New Hire Form only + is a merge field in the offer template, the user will be able to fill it in on the Offer tab and the Hire form.
- In order to be able to display Job/Org fields on the Offer tab, they must be inserted in the Offer template (this can be done hiding the field in the footer of the letter template, in font face webdings, font size 1 and font color white); they will appear with the value selected at the job creation but the user will be able to see and update it (by selecting another value if this is a drop down). The Job/Org field doesn't appear in the Hire form.
- We can only filter candidate fields (on candidate profile and job profile) with the single select type.

Rejection / Withdrawal Reasons

- Cannot duplicate wording on withdrawal/rejection reasons - if you deactivate the default, you'll need unique values for new list

Tags

- no "spellcheck", build as go, no pre-defining lists (unless load on a fake candidate)
- *Easier to load via API
- 50 characters limit per tag
- Maximum of 100 tags per candidate.
- If a customer creates more than 1,000 Tags, the Tags filter only displays results for the 1,000 most frequently used Tags

Referrals

- REFERRER - When an external person refers a candidate using the refer a friend feature from the job advert
- BO_REFERRER - Employee Referral
- MANAGER_REFERRAL - This source can be applied manually in SR/API
- SOCIAL_REFERRALS - to the best of my knowledge this is a legacy feature that can now only be applied manually when creating a candidate via SR/API

- **Source**
  - Candidate source is the source from the very first application vs application source can very on other applications depending on where the candidate applied to

- **User account creation**
  - No ability to define the time zone for the user
  - Possibility to bulk upload users from a csv file: WARNING: this triggers an invitation email (no way to deactivate it for now).
  - The above feature allows to assign seat to CRM, SmartMessage and SmartPal
  - Navigation language can only be set when creating the user, editing a user account will not give you access back to the language menu.

- **Users role set up**
  - Giving a custom role FULL access to report builder will give them access to all data even if they have an access group assigned.
  - A limited access is equivalent to a Interview access as defined on this [help page](#)

- **Custom hiring team roles**
  - Do not show up in filters
  - Are now available in Report Builder.

- **Career Site**
  - **Job Boards**
    - No notification when posting expires
    - LIR- system does not know if slots are full, client will submit and wait. If posting fails SR team emails customers to let them know. *client can also see this on their LI dashboard*
  - **Career Pages/Postings**
    - There is no limit on number of career pages
    - Job Posting Details
      - Field/Industry are for job boards only, do not show on career page
      - "Posted by" can be turned off on by profile basis, but cannot be changed per posting (ex: Jim posted FOR Sally, it will still show Jim)
  - **Widgets**
    - Widget has no pagination
    - Changing the language only changes headers and text, not content.
    - Location filtering can only be done per city, not country. In Global context, workaround is to add a list of cities in the widget code (see SGS for example:
      Country filter has been hard coded so each country link takes to a filtered widget with the relevant list of countries (complex to maintain when the client hires anywhere):
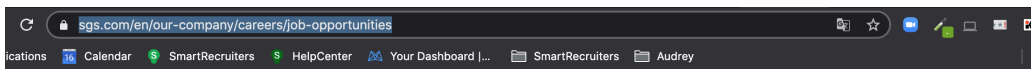
Stay up-to-date with the latest jobs that match your profile.

Créer une alerte

SGS OFFICES & LABS

PLEASE SELECT YOUR LOCATION:

Algeria	Egypt	Malaysia	Serbia
Angola	Finland	Mauritius	Singapore
Argentina	France	Mexico	South Africa
Australia	Germany	Middle East	Spain
Austria	Ghana	Mozambique	Switzerland
Bangladesh	Hong Kong	Netherlands	Taiwan
Belgium	Hungary	New Zealand	Tanzania

```
280  </div>
281  <script type='text/javascript' src='https://static.smartrecruiters.com/job-widget/1.5.1/script/smart_widget.js'></script>
282  <script type='text/javascript' class='job_widget'>
283  widget({
284      "company_code": "SGS",
285      "bg_color_widget": "#ffffff",
286      "bg_color_headers": "#ffffff",
287      "bg_color_links": "#ddd",
288      "txt_color_headers": "#292929",
289      "txt_color_job": "#3d3d3d",
290      "bg_color_even_row": "#eee",
291      "bg_color_odd_row": "#f8f8f8",
292      "auto_width": "auto",
293      "auto_height": "auto",
294      "number": "on",
295      "job_title": "true",
296      "location": "true",
297      "type_of_employment": "true",
298      "department": "true",
299      "published_since": "true",
300      "dateFormat": "eu",
301      "add_search": "true",
302      "filter_locations": ["Aix En Provence","Amiens","Angers","Annecy","Arcueil","Arras","Artigues Pres Bordeaux","Aumenancourt","Aunay-Sous-
     Auneau","Bassens","Bayonne","Bobigny","Bonneuil Sur Marne","Bordeaux","Bouchain","Bourges","Brest","Brive la
     Gaillarde","Bruguieres","Caen","Cergy","Cestas","Chambery","Châteauroux","Chatou","Clermont-
     Ferrand","Clichy","Coignieres","Courbevoie","Courcouronnes","Dijon","Domene","Douai","Dreux","Dunkerque","Etupes","Fleury-Mérogis","Florange","Fort De
     France","Gevrey Chambertin","Gravelines","Gravigny","Grenoble","Harfleur","Jonquières","La Maxe","La Palud","La Rochelle","Lanester","Laval","Lavera","Le
     Bouscat","Le Lamentin","Le Mans","Le Meux","Le Petit-Quevilly","Les Sorinieres","Lille","Limay","Longjumeau","Lorient","Lyon","Marly-le-
     Roi","Marseille","Martigues","Meaulte","Melun","Metz","Montoir De Bretagne","Montoir-De-Bretagne","Montpellier","Mulhouse","Nantes","Neuille Pont
     Pierre","Nice","Nimes","Niort","Noyelles Godault","Oignies","Orsay","Paris","Pau","Perpignan","Petit Couronne","Plabennec","Pointe-à-
     Pitre","Poitiers","Port-de-Bouc","Puilboreau","Quimper","Reims","Rennes","Rouen","Saint Brice Sous Foret","Saint Brieuc","Saint Denis","Saint Etienne Du
     Rouvray","Saint Malo","Saint Priest","Saint-Priest","Saint-Benoît","Saint-Etienne-du-
     Rouvray","Sene","Sete","Sevres","Sillingy","Strasbourg","Tarbes","Templemars","Ternant","Tonneins","Toulouse","Tours","Trignac","Valenciennes","Vannes","Ver
     neuil d'Avre et d'Iton","Verneuil Sur Avre","Versailles","Villeneuve La Garenne","Vitrolles","Équeurdreville-Hainneville","Étupes"],
303      "departments_field_id": "5d946e2bd244ea771ed25c10",
304      "jobAdType": "PUBLIC",
305      "trid": "",
306      "api_url": "https://www.smartrecruiters.com",
307      "custom_css_url": "https://static.smartrecruiters.com/job-widget/1.5.1/css/smart_widget.css"
308  });
309  </script>
```

○ **Public posting API**
■ Limited amount of info you can retrieve on the postings via these endpoints
■ Available endpoints:
● /postings – method for searching postings
● /postings/{postingId} – method for getting details of specific posting

- As long as you have the company ID, you can manage these, any additional detail would require the customer's API key. This is for the purpose of allowing companies to help build career sites with a third party without giving them full access to their system.
- Posting APIs do not give you access to the parser, Candidate API gives you access to the parsing as a workaround. But can create duplicate profiles (downside) (can also explore getting a license with a parser)

- **Candidate Portal**
    - We can't edit cand facing statuses (i.e. "rejected")
    - If candidate updates their screening questions, you will see multiple versions in the UI
    - The main statuses are automatically made visible to the candidate on the candidate portal
    - Candidate sees job under "Archived" after being rejected

- **SSO**
    - **Enabling**
        - we provide documentation but do not configure this (client owns)- you can submit a support ticket to help them walk through this if absolutely necessary
        - When SSO is configured, clients can decide if they want to sign in only via SSO or if they want to use both SSO and login page. If they opt for SSO only then a support ticket needs to be submitted. They should be also told the support phone number 1-888-540-0950 in case of failover e.g. IDP provider is down.
            - Here is an internal article on the SSO only feature
    - **Creating Users w/o User Integration**
        - If a client does not have user integration, they must manually PATCH SSO ID in order for successful authentication. See documentation here.

- **IP Addresses to whitelist (for security teams)**
    - Accessing SR account - this should be done on a domain level (smartrecruiters.com), as the IP address that are used are dynamic and will change over time.
    - Receive all emails - IP address - 192.254.112.23
    - Integration/jitterbit-
        - 54.208.19.24
        - 54.208.19.13
        - 52.45.79.49
        - 52.36.120.247
        - 54.69.5.5
        - 35.166.153.63
    - Schedule/accept/decline appointments-
        - 18.184.122.101
        - 35.157.94.240

- **Domains**
  - @mail.smartrecruiters.com
  - @sr.smartrecruiters.app
  - @sent.smartrecruiters.com
  - @smartrecruiters.com

- **DocuSign**
  - **Email Address**
    - In order for a user to use the integration, they have to have a DocuSign account where the email matches exactly the SR email address *case sensitive
  - **To Authenticate**
    - You need to have the appropriate permissions enabled in the DS account (API Wide Access / Send on Behalf of). Then, an Admin in the DocuSign account (this does not need to be an SR user!) needs to authenticate in Contract Management.

Limits

- **Job fields**
  - Active values you can add to each job field - 10,000
  - Total values you can add to each job field to 12,000
  - 200 job fields (6 "standard": Cost Center, Job Category, Job Code, Job Function, Salary Grade) - 25 org fields (22 custom + 3 standard fields)
  - Each dropdown value has a limit of 200 characters
  - Free text fields have a limit of 1000 characters
  - Max 10 layers of dependencies
  - Job title characters: 255
  - There are 6 Job Fields that already exist and are suppressed, so the exact job field name cannot be used. *we will suggest to slightly modify, e.g., "cost centers"
    - Business Unit
    - Cost Center
    - Job Category
    - Job Code
    - Job Function
    - Salary Grade
  - Note that archived values still show in standard Analytics dashboards and cannot be filtered out - until this gets enhanced, best practice would be to add a code before each archived value (eg. ARCH or a Z_) so users can make sure they do not select them in job/org fields filters.

- **Job Internal Notes**
  - 20,000 characters
  - Restricted (forbidden) special characters in the Internal Notes:
    - ; (semicolon)
    - { (left-curly bracket)
    - } (right-curly bracket)
    - \ (backslash)
    - < (less-than)
    - > (greater-than)
    - ^ (caret)
    - ` (diacritic)
    - ~ (tilde)
    - = (equal sign)

- **Screening questions**
  - Limit of 80 values for dropdown questions
  - The Text of questions have a limit of 1440 characters
  - Dropdown menu items have a limit of 100 characters
  - 500 screening question set limit per type (ie 500 public, 500 internal, 500 community. 1500 total)
  - Limit of 5000 standard or diversity screening questions (updated 28th Oct 2021)
  - Internal vs. External sets:
    - Internal sets will be displayed on internal job ads and on external job ads published on an internal career page
    - FExternal sets will be displayed on public and private job ads.

- **Hiring Process**
  - 8 steps max on hiring steps
  - An archived HP step cannot be recreated with exactly the same name
  - Limit of 120 hiring processes

- **Match Score**
  - A single applicant is limited to 100 Match Scores calculated across 100 jobs
  - Match Score will not be calculated once a candidate has applied for more than 100 jobs

- **Interviews**
  - 10 interviewers by interview
  - 1000 character limit for interview note
  - 10,000 character limit for message to interviewers

- **Scorecards**
  - 80 criteria for scorecards
  - Characters limited to 1000

- **Consent**
  - 2500 request for consent at a time

- **Email Templates**
  - Name: 200 characters
  - Subject: 200 characters
  - Body: 48,300 characters

- **Offer Templates**
  - Name: 400 characters
  - Basic filtering option (sort A-Z , recent activity or keyword search) so better to use a strict naming convention.
  - When updating offer templates, in order to hide a version to users until it gets officially available to use (in a Hire sync update context for instance), the template can be filtered on a non used country.
  - No candidate field limitation
  - Recommendation when creating the word template: make sure headers and images are sent to back (not on only sent backward)
  - Clauses: when copy-pasting the clause snippet, make sure you paste keeping source formatting or text only.
  - Maximum number of clauses associated with an offer template: 20
  - Delete the "No" option.
  - The maximum file size is 2 megabytes max

New Capabilities

The following capabilities are new:

- The maximum number of clauses associated with an offer template has increased from 5 to 20.
- The deletion of a "No" option nested clause has been enabled.
- The maximum file size of a clause has increased from 20 kilobytes to 30 kilobytes.
- The maximum file size of an offer template (with clauses) has been increased from 500 kilobytes to 2 megabytes.

- Architecture improvements have been made to eliminate the possibility of time-outs when rendering offers.

- **Offer Approval**
  - If job/org fields need to be displayed on the Offer tab for offer approval, they have to be inserted on the offer templates - it could be done in a hidden way if the candidate should not see those fields: choose font face webdings, font size 1 and font color white, displayed in the footer for instance. The system will detect the fields and will display them as mandatory fields for approval - candidates will not see them.

- **Application fields**
  - Over 10000 characters in a free text field for candidate fields
  - Limit of 1000 character in candidate field drop down
  - Numerical 12 characters
  - First name/last name : 300 characters
  - Percentage
  - Date field
  - Currency
  - Candidate first name and last name: 128 characters

- **Number of hiring team members:**
  - 200 - can have more but starts impacting system performance

- **Approval chains**
  - 10000, however starts impacting system performance and super hard for maintenance Ordered in last updated, no option to sort it in any other way.

- **Career pages**
  - Unlimited
  - Job search bar in career page = 80 pixels vertically (space to type = 60 pixels vertically)

- **Document upload**
  - Candidates cannot load more than 10MB in attachments
  - As a user I can send more than 32 MB worth of attachment but as a candidate I don't receive it if it is above 32MB (probably a block on gmail account to only receive up to that amount) so we probably want to tell clients that the limit is 30 MB to make sure candidates can receive the emails.

- **Resume Import**
  - 10,000 files can be imported, but may be lower if file sizes are large.

- **Saved searches**
  - 10 per user (SmartGlobal) // 5 per user (Other SmartRecruit)

- **CRM**
  - No limits to Community
  - No limits to LCF per Community
  - No limit to Segments per Community

- **SR text fields**
  The restricted (forbidden) special characters in SR text fields are as follows:
  - ; (semicolon)
  - { (left-curly bracket)
  - } (right-curly bracket)
  - \ (backslash)
  - < (less-than)
  - > (greater-than)
  - ^ (caret)
  - ` (diacritic)
  - ~ (tilde)
  - | (vertical line)

- **Candidates Notes**
  - Notes are limited to 10 000 characters (including spaces)

- **Bulk actions**
  - 900 for candidates deletion

- **Clauses**

  - 20 clauses
  - 30KB max file size of a clause
  - 10MB per document without clauses used
  - 2 megabytes if clauses are used (product team working to increase this to 20 MB)

- **Custom Forms**
  - Whilst there is no limit to the number of forms that one account can setup, each form can only include a maximum of 100 candidate fields.
  - The standard candidate field name language in the form is based on the user's language.
  - No character limitation for the hint entries
  - For the candidate field to appear in the Forms tab on the candidate profile, the candidate field has to be visible on the candidate profile.

- **Recent Jobs**
  - The jobs displayed are jobs created last year (since 365 days back from today).
  - Users can scroll to the end of the list of jobs he/she has access to - ,that per each scroll the list will load new 20 + recordsThere are at most 20 of them and the order is in alphabetical order by job name.

- **Report Builder**
  - Report files (saved reports) will be automatically deleted 30 days after their creation.
  - No row limit
  - No limit to the number of filters, except 150 within the same domain (Like if you have "Cost Centre" you can only list 150 of them).
  - Limit of number of users a report can be shared with: 100 users

- **Workflow**
  - There is a maximum limit of 10 send message blocks per hiring step to avoid overwhelming users with too many messages in one go.
  - But only send message per hiring team role
  - Filter rule for send message: Days in candidate has been in step, counts the days and ignore the weekend (so messages could be send on a Sunday)

- **Add On: SmartMessage**
  - No possibility to define text message templates.
  - No possibility to send text/whatsapp messages in bulk.
  - We support only SMS communication between phone numbers from the same country. If for example the client wants to message a German candidate they need a German phone number to do it.
  - If a country is not on the list then it is advised to use WhatsApp. To set up WhatsApp, any phone number (from the list) is good.

- **Application Form - Hiring Manager Message**
  The message is limited to 4000 characters.

- **Agency**

  Agency entries can't be deleted.

- **@mention**

  A standard and basic user could do the following actions if they are @mentioned and not part of the hiring team:

  enter review

  enter notes

  interview scheduling (!)

  send emails

  edit delivered forms

  request consents

  add candidate to other jobs and communities

  defer a candidate

  edit contact Info

  add Attachments

  fill application fields

- **SmartOnboard**
  - Formatting of the date is based on user language (language of the UI) - if your language is English US - the you see MM/DD/YYYY (will be DD/MM/YYYY for english Great Britain). if your language is French - you see DD/MM/YYYY
  - There is no limit to the number of onboarding form fields that can be created
  - Welcome email language is based on the user's language.

- **Notification Bell**

Notification Description	Recipient Users
Candidate Applied	Hiring Manager Recruiter Coordinator
Notification Bell Welcome	New Users
Review Candidate when Candidate moved to specific step (various steps)	Hiring Manager, notifications as defined in Hiring Process
Task Management: Schedule new interview	Assignee of Task

Task Management: Create invite to self-schedule	Assignee of Task
Task Management: Send a message	Assignee of Task
Task Management: Submit interview feedback	Assignee of Task
Task Management: Reject candidate	Assignee of Task
Task Management: Send assessment	Assignee of Task
Task Management: Create offer	Assignee of Task
Task Management: Publish job	Assignee of Task
Task Management: Unpublish job	Assignee of Task
Task Management: Edit job ad	Assignee of Task
Task Management: Review candidate	Assignee of Task
* For all tasks, up to two notifications can appear - 1) when first assigned and 2) if task is overdue	

- **Merging candidates rules**

Candidate profiles are automatically merged when a candidate's second application matches the email address and last name. The merging occurs only at the time of the application, and editing the candidate's email address and last name, will not result in a merge with another profile.

- **Onboarding**

New hire portal available for the company only. Not on brand level