Custom Hiring Team Roles

Custom Hiring Team roles to allow Admins to precisely configure the access and actions allowed for each default hiring role, and create/configure up to 5 new custom roles.

- **Configure default roles:** Modify the set of permissions available to each default role
- **Additional Roles:** Create up to 5 custom roles, and configure the permissions for each role independently

Before we dive into the process of configuration, let's examine how SmartRecruiters defines permissions:

- **Actions for each role**
- **Access levels for each action**

**Actions**

Each custom and default hiring team role's permissions is defined as a list of actions they can or cannot perform in relation to the job or candidates on the job.

For example, job actions include:


Updated: Wed, 18 Mar 2020 23:41:25 GMT
Powered by
- Publishing/unpublishing/cancelling a job
- Editing the job's status manually (without moving the candidate forward or back in the process.

When added to a job's hiring team and assigned a role, the user is assigned the role's list of allowable actions for that job and any candidate applications to that job.
Access levels

Each role is assigned an access level for each action. The access level determines exactly what a user who is assigned that role can do in relation to that action.

Some actions have three levels:

- User can see and modify information
- User can see but not modify information
- User cannot see or modify information.

Others have only two:

- User can perform this action
- User cannot perform this action
Job actions

The following sections specify configurable actions related to a job, the access levels available for each action, and any dependencies between them, i.e., which levels/actions must be assigned together.

**Job Ad Tab**

Controls access to the Job Ad tab on the job.

- **Write**: Can see all job ads, duplicate, edit and create custom sources
- **Read**: Can only see list of job ads, cannot take actions
- **None**: Cannot see hiring team

**Hiring Team**

Controls access to list of hiring team members in Hiring Process tab of the job.

- **Write**: Can add new hiring team roles and edit existing hiring team's roles
- **Read**: Can see hiring team but cannot take any actions
- **None**: Cannot see hiring team

**Public Job Details**

Controls access to list of hiring team members in Job Details tab of the job.

- **Write**: Can see and edit public job details
- **Read**: Can see public job details
- **None**: Cannot see public job details

**Scorecard**

Controls access to the scorecard in Hiring Process tab of the job.

- **Write**: Can edit scorecard
- **Read**: Can see scorecard
- **None**: Cannot edit scorecard but can see criteria

**Job Status**

Controls ability to manually change job status.
User can manually change job status
User cannot change job status.

**Publish / Unpublish / Cancel**

Controls ability to publish, unpublish, or cancel a job.

Can publish, unpublish or cancel job. User must have ability to create job.
User cannot see or modify information.

**Internal Job Details**

Controls access to Internal Job Details and Attachments section in the Job Details tab on the job.

Can see and edit internal job details and add attachments
Can see internal job details and see attachments
Cannot see internal job details or attachments

**Sourcing Tab**

Controls access to sourcing tab on job's profile.

User can access sourcing tab
User cannot access sourcing tab

**Positions**

Controls access to the headcount/positions section under the Job Details tab on the job.

Can add, edit and remove a position and can see all approval details
Can see the list of positions but cannot take any actions
Cannot see the list of positions

**Internal Notes**

Controls access to Internal Internal Notes section under the Job Details tab on the job.

Can see and write internal notes
Can see internal notes
Cannot see internal notes
Add Candidate

Controls access to Activity tab on job's profile.

- Can add a candidate to the job
- Cannot add a candidate to the job

Activity Tab

Controls access to Activity tab on job's profile.

- User can access Activity tab
- User cannot access Activity tab
Candidate actions

Here's a list of all the configurable actions related to a candidate, the access levels available for each action, and any dependencies between them, i.e., which levels/actions must be assigned together.

**Application Fields**

Controls access to application fields.

- Can see and edit application fields
- Can see application fields but cannot edit
- Cannot see application fields

**Restricted Application Fields**

Controls access to restricted application fields (fields that are marked as "Only users with full access can see it").

- Can see and edit restricted application fields
- Can see restricted application fields but cannot edit
- Cannot see restricted application fields

**Edit EEO Screening Questions**

Controls ability to edit a candidate's EEO screening questions answer in case the applicant did not provide an answer.

- Can edit EEO screening questions
- Cannot edit EEO screening questions

**Consent**

Controls ability to request consent and view consent status.

- Can request consent and see consent status
- Cannot request consent or see consent status

**Attachments**

Controls ability to view and add attachments to application.
Can add/see attachments
Can see but not add attachments
Cannot see or add attachments

Notes

Controls ability to write and view notes and comments on the Notes tab.

Can write a note and see all entries, can comment all entries
Can see all entries, can comment if @mentioned
Cannot see the notes tab

Hire

Controls access to the Hire form and confirm hiring

Can access and edit Hire form, and confirm hiring
Can access but not edit Hire form, and cannot confirm hiring
Cannot access Hire form

Edit Status

Controls ability to edit a candidate's status in the hiring process.

User can change candidate status
User cannot change candidate status

Cards Down

Controls ability to see reviews that have been made prior to adding one.

User cannot see reviews before adding their own
User can see reviews

Delete Attachments

Controls ability to delete attachments from application.

Can delete attachments
Cannot delete attachments
Interviews

Controls access to Interviews tab ability to view, schedule, and edit interviews. Any hiring team member may be invited to an interview, regardless of their access level to Interviews.

- Can see previous interviews and schedule an interview
- Can see previous interviews and but cannot schedule an interview
- Cannot see Interviews tab

Offer

Controls access to Offers tab and ability to create/edit/send offers, send/view offer approvals, and view offer information.

- Can create an offer, send it for approvals, see previous offers and approvals, and send offer to candidate
- Cannot create an offer or send it for approvals or to candidate, but can see previous offers and approvals
- Cannot see Offer tab or offer-related messages and attachments

Reviews

Controls access to the Review tab.

- Can see previous reviews and write reviews
- Can see the reviews tab but cannot write a review
- Cannot see the reviews tab at all

Add/Reactivate/Remove from this job

Controls ability to add or remove candidate from job, or reactivate them.

- Can add candidate to job, reactivate candidate on job, or remove candidate from job
- Cannot add candidate to job, reactivate candidate on job, or remove candidate from job

Edit Source

Controls ability to edit application source.

- Can edit source of application
- Cannot edit source of application
See 'public' screening questions

Controls ability to see the answers to screening questions.

- Can see screening questions
- Cannot see screening questions

See restricted screening questions

Controls ability to see the answers to screening questions that have been marked as "Only users with full access can see it".

- Can see restricted screening questions
- Cannot see restricted screening questions

Reject/Mark as withdrawn

Controls ability to reject/mark a candidate as withdrawn and choose/view reason.

- Can reject/mark as withdrawn and choose a reason
- Cannot reject/mark as withdrawn but can see the reason
- Cannot see the reason

Tags

Controls access to view and edit tags on application.

- Can see and add tags
- Can see but not add tags
- Cannot see or add tags

Profile Edit

Controls ability to edit personal, experience, or education information on profile.

- Can edit personal, experience, or education information
- Cannot edit personal, experience, or education information

Updated: Wed, 18 Mar 2020 23:41:25 GMT
Powered by
Other Applications
Can view a candidate's other applications, even if the user is not assigned to those jobs.

- Can see all of a candidate's applications
- Can only see candidate's application to a job if member of hiring team on that job.

Emails
Controls access to Message tab and ability to send emails to candidate and read emails sent to candidate.

- Can send emails to candidate and see sent emails in Messages tab.
- Can see sent emails in Messages tab, but cannot send new emails to candidate.
- Cannot see Messages tab

Activity
Controls access to the Activity tab on the application of a candidate.

- Can see the activity tab
- Cannot see the activity tab

Defer
Controls access to the ability to defer a candidate.

- Can defer
- Cannot defer

Configure default roles
On the Configure default roles tab are two tables: Job and Candidate permissions. Each row in the tables is a specific action; each column, a specific default role.
To configure the permissions of a particular default role:

1. Find the action in the Job Actions or Candidate Actions table.
2. Hover over the row for an action, and click **Edit**.
3. Choose the role's correct level of access for that action from the list, and click **Save**.

Changes take effect immediately.
Configure additional roles

To create and configure custom hiring team roles:

1. Click on the Additional Roles tab.
2. Click Manage additional roles.
3. Click Add a role.
4. Give the role a name, and click Save.
5. In the Job and Candidate Actions tables, go through each action and assign an access level. When you create a new role, SmartRecruiters defaults all of the role's access levels to None.

   Job
   Choose the actions and information that are available to each hiring role on a job

   EU Approver - Engineering
   None
   Write
   Can add new hiring team roles and edit existing hiring team's roles
   Read
   Can see hiring team but cannot take any actions
   None
   Cannot see hiring team

   Make sure to click **Save**!

6. Repeat as needed for both tables.

   Admins can add **up to five custom roles**. Just click **Manage additional roles** to add another.
Create up to five new hiring team roles and configure permissions for each. Learn more about this setting in our Help Center.

Manage additional roles

If you've added more than one, you can update each at the same time:

To delete a role, click Manage additional roles, then click the Delete icon for the role.
A few things to keep in mind:

- Admins cannot **deactivate** a custom hiring team role if the role is currently being used in an existing approval chain.
- Admins cannot **delete** a custom role or if there is at least one user assigned that role on a hiring team.
- There are some interdependencies between actions. SmartRecruiters will resolve these interdependencies as needed. For example, assume an Admin has granted a user Write permissions for Offers, but None permissions for Messages. The user will need to be able to send an offer, so SmartRecruiters will ignore the Messages permission. In the future, we may add deconfliction rules, but this is the current logic.
- SmartRecruiters will automatically update candidate status based on user actions, even if the user doesn't have the ability to edit status.
- Our Hiring App will follow the same permissions as the web app.