

Setting up Eclipse

User Manual

Eclipse Recruitment Manager 4



Contents

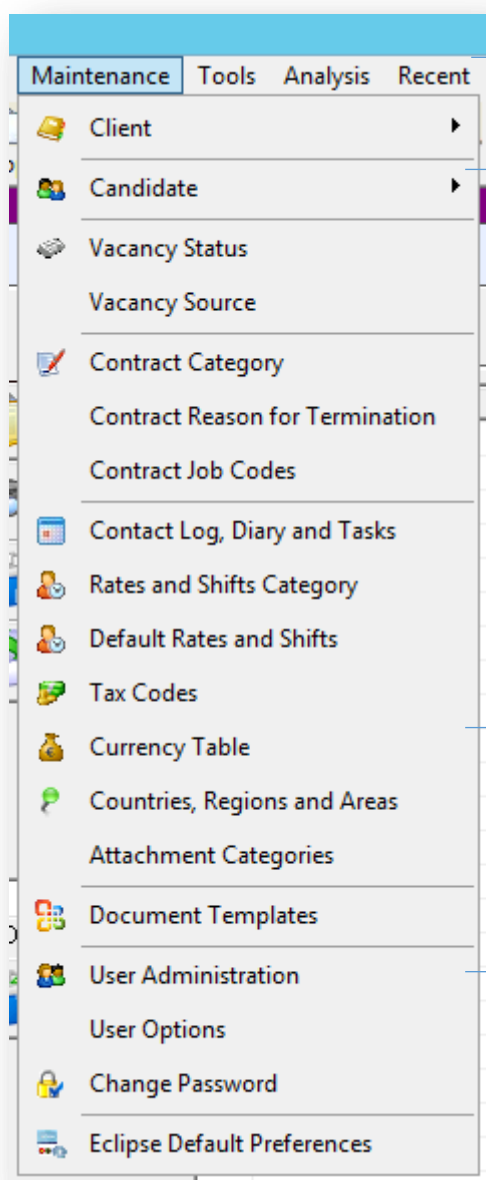
1. Introduction.....	4
2. User Administration	5
2.1 User Details.....	7
2.2 Records	8
2.3 Maintenance.....	10
2.4 Activity	11
2.5 Printing	12
2.6 Sections.....	13
2.7 User Stats.....	14
2.8 Diary/Reminder	15
2.9 Contract/Timesheets:.....	15
2.10 Email Options:	19
2.11 HTML Email Signature:	21
2.12 Text Email Signature:	21
2.13 Candidate:.....	22
2.14 Updating User Permissions:	22
3. Eclipse Default Preferences	23
3.1 General:	23
3.2 Candidate:.....	25
3.3 Vacancy:.....	27
3.4 Temp Contract:.....	28
3.5 Sage Line 50:	33
3.6 Sage Payroll:	34
3.7 Sage 200:.....	35
3.8 Invoice:	36
3.9 Timesheet:	38
3.10 Tempaid:	41
3.11 OLI Pay:	41
3.12 Tempest:	42
3.13 Custom:.....	43
3.14 Client:.....	44
4. Client Industry Sector, Status And Contact Position	47
5. Client Other Agencies.....	48
6. Client Referral.....	48

7. Candidate And Vacancy Industries, Disciplines & Core Skills	49
8. Candidate/Vacancy Qualifications	52
9. Candidate Experience.....	53
10. Candidate Referral	54
11. Candidate Right To Work	54
12. Candidate Shift Availability.....	56
13. Candidate PSC/Umbrella.....	57
14. Candidate 2 nd Tier Agency.....	58
15. Candidate Reason For Unavailability.....	59
16. Vacancy Status.....	60
17. Vacancy Source.....	61
18. Contract Category.....	62
19. Contract Reason For Termination.....	63
20. Contract Job Codes.....	63
21. Contract Log/Diary/Tasks	64
22. Rate & Shifts Category	66
23. Default Rates & Shifts	67
24. Tax Codes.....	75
25. Currency Table.....	76
26. Countries, Regions And Areas.....	78
27. Attachment Categories	78
28. Document Templates	79
29. Creating a new email Document Template.....	81
29.1 Editing And Deleting Existing Templates.....	84
30. Creating A New SMS Template	84
31. Creating A New Word Document Template.....	86
32. Master Document Templates	89
33. CV Formatting Options.....	90
33.1 Creating A CV Template	91
33.2 Formatting A Candidate's CV Using A Template	92
33.3 Formatting A Candidate's CV From The Original.....	93
33.4 Creating A Macro.....	93
33.4 Formatting CV's using a Macro	96
34 Creating A CV Coversheet	96
34.1 Creating The Coversheet Document.....	96
34.2 Outputting The CV Coversheet	98

35 Outputting Documents.....	99
35.1 Outputting A Word Document	100
35.2 Outputting An Email Document.....	103
36 Attaching Documents, Files and CV's To An Email	104
36.1 Attaching A Document To An Email.....	105
36.2 Attaching A File To An Email Template	107
36.3 Attaching A CV To An Email Template.....	107
37 Sending The Email To The Outbox	109
38. Mailshots	110
39. Creating A New Excel Export Template	111
40 User Options.....	113
41 Change Password	114

1. Introduction

This manual explains how to configure the Eclipse software to meet the specific requirements of those using it. It is crucial that the set-up of the software is complete before general use of the system begins. This step by step guide explains how to configure user profiles and assign individual usage permissions, create searchable fields critical to the functionality of Eclipse and the creation of document templates for correspondence. All of these functions are performed via the 'Maintenance' menu' which can only be accessed by those assigned the permission to do so. The 'Maintenance' menu can be found within the menu bar at the top of the screen.



Access the 'Maintenance Menu' from the toolbar at the top of the screen.

There are multiple Client and Candidate sections, click the arrow to display.

Searchable fields are configured within the 'Maintenance Menu'. These are the 'nuts and bolts' behind the search functionality within Eclipse.

Individual user profiles are created within the 'User Administration' section. This is the first thing to consider when setting up the software.

2. User Administration

Setting up individual user profiles is the first step in configuring the software. The User Administration screen can be accessed from the maintenance menu shown above and is the option which appears 4th from the bottom of the list. It is from within this section that user profiles are created for each consultant or user. Within an individual user profile, permissions are granted to perform certain actions within Eclipse, defining what 'is' and 'is not' allowed. This also facilitates the recording of information throughout Eclipse so it is possible to see exactly how well the consultants are performing.

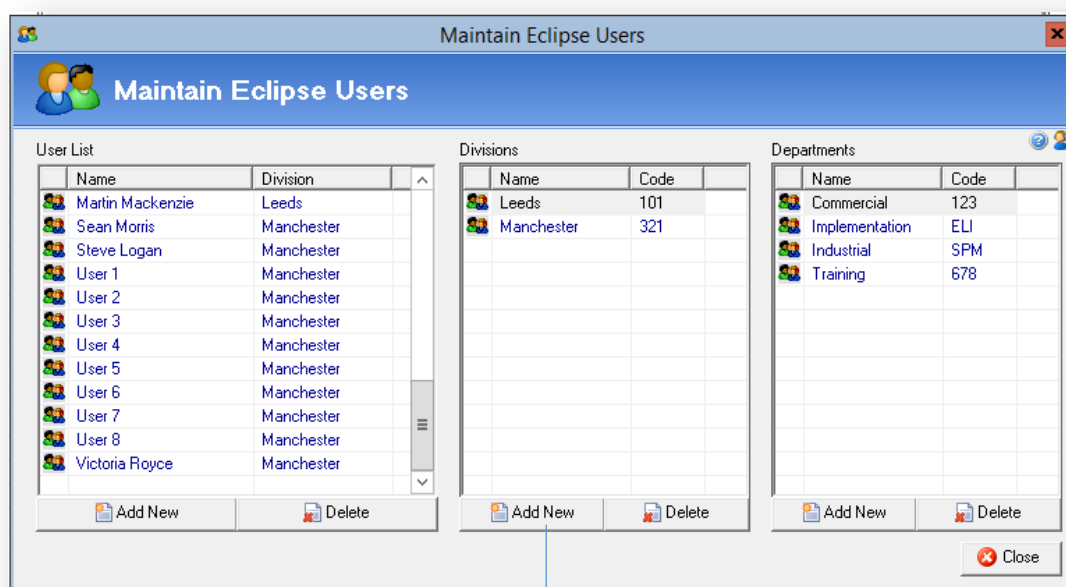
Initially, the system administrator, or the person assigned to configure the software, will log into Eclipse using the following details:

User Name: Admin

Password: Admin

This user profile should be deleted once individual profiles are created.

Selecting 'User Administration' from the 'Maintenance Menu' presents the following 'Maintain Eclipse Users' window:



To set up a new 'user', 'division' or 'department' simply select 'Add New' beneath the relevant section.

Upon purchase of the software, only one user profile exists. This is the administrator profile which should be deleted once individual profiles have been configured. After adding user profiles into Eclipse, existing users are listed in the left hand box, alphabetically by forename. To view a user's profile simply double click on their name.

It may be useful to assign users to a 'Division' and/or 'Department'. This is especially useful for searching and reporting on divisional and departmental performance within Eclipse. The example above shows 'Divisions' as 'office locations' and 'Departments' as 'types of recruitment'. However, 'Divisions' could also signify 'industry sectors' etc. To add a new 'division' or 'department', simply click the 'Add New' button beneath the relevant box.

The 'Cost Centre Code' is only required when exporting information to Sage MMS.

The 'Department Code' is only required when exporting invoice information to Sage 50 Accounts

The 'user division' window asks for four pieces of information;

Division Name:

This is the name of the division e.g. office location or industry sector.

Cost Centre:

The 'Cost Centre Code' is only required in conjunction with the Sage MMS Export Bolt-On. Where 'Cost Centre Codes' are required they should be the same as those configured within Sage MMS itself. Typical values would be '001' / '002' etc. This allows the calculation of expenditure V's department. Finally where timesheets are processed using the faxed image method and incorporate the queuing feature, select the timesheet folder for the division using the green '+' button. This will open the Windows file manager and the folder can be located.

Timesheet Image Folder:

This field should be used in conjunction with the 'process timesheet using image' tool. Where divisions are responsible for processing and authorising their own timesheets only, separate timesheet folders for each division should be created outside of Eclipse. The folder relating to each

division should be selected here therefore when processing timesheets only the timesheets within the specified division's folder can be seen.

Employer Reference:

This field only requires completing where the Export to Tempest bolt-on is activated.

The 'user division' window asks for four pieces of information;

Department Name:

This is the name of the department.

Department Code:

The department code is only required when the Sage 50 Accounts export bolt-on is activated. This should correspond with the Department code configured in Sage.

To delete an existing user, division or department, highlight the desired record within the 'Maintain Eclipse Users' window with a single click and then select 'Delete' beneath the relevant section.

2.1 User Details

Selecting 'Add New' opens the following 'User Details' window.

By default there are 12 tabs within each profile. (Where the website integration tool is activated there are 13 tabs as shown below) The first tab is the 'user details' screen as displayed below:

Complete the user's details including a user name and password

Don't be tempted to 'Save' at this point as there are further tabs to configure

Complete the user's details including full name and contact details. Where required select the division and department that the user belongs to. Also assign a 'username' and 'password'. The password can be changed by the individual to one of their choice once they log into the system. If a

user forgets their password, those with the relevant permissions will be able to reassign a password from this screen.

2.2 Records

To navigate to the 'records' tab simply click on the tab at the top of the window. The following screen will appear:

Ticking the 'Batch Delete Records' and 'Batch Update Records' boxes allow users to perform batch deletion and batch update of records

Ticking the 'Report Access' or 'Excel Export' boxes will allow reports of those types to be outputted

Sets whether the user is able to create, amend and delete records within the database. Also there are record and report access permissions for each section available.

	Create Records	Amend Records	Delete Records	Batch Delete Records	Batch Update Records	Lock Override	Consultant Lock	Division Lock	Allow Report Access	Allow Excel Export	Allow Unsuitable List Administration	Allow Loading of Other Users Saved Lists
Client	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Candidate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vacancy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Interview	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Timesheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

NOTE: Ticking 'Consultant Lock' or 'Division Lock' will prevent this user access to records within Eclipse.

Update this users permissions when saving the permissions for : --None--

Close Save

Placing a tick in the 'Create Records', 'Amend Records', 'Delete Records' and 'Lock Override' boxes allows the user to perform those actions.

Ticking the 'Consultant Lock' or 'Division Lock' columns will restrict access to either the user's own records or division's records

Create Records, Amend Records And Delete Records:

Click the relevant boxes to assign permission to create, amend and delete records within Eclipse. These permissions can be broken down by record type e.g. permission may be granted to create candidate records but not client records etc.

Batch Delete Records And Batch Update Records:

Selecting a box within the 'Batch Delete Records' Allows the user to perform the batch deletion of records on the system, note: records with related cannot be batch deleted. Selecting a tick in the Batch Update Records' allows the user to batch update the Status, Division and Consultant assigned to the record.

Override Record Locking:

Selecting 'Lock Override' allows the user to edit a record even it has been 'locked' by another user. Locking records is useful where consultants have ownership over their own clients, candidates, vacancies etc. It is possible to lock every type of record in Eclipse.

Consultant And Division Lock:

Selecting a box within the 'Consultant Lock' column will restrict the user's access to view only records of that type belonging to that user. Selecting a box in the 'division lock' column extends the permission to allow access to records within the user's division. Leaving boxes un-ticked allows access to all records of that type within the system.

Allow Report Access:

Selecting boxes within the 'Allow Report Access' column will allow the user to run the pre-configured reports within that particular section.

Allow Excel Report:

Selecting boxes within the 'Allow Excel Export' column will allow the user to run bespoke excel reports from within that particular section.

Allow Unsuitable List Administration:

The 'Allow Unsuitable List Administration' option must be ticked to grant permission to manage the client and candidate unsuitable lists. Listing candidates as 'unsuitable' will activate certain warnings E.g. where an interview is arranged for an unsuitable candidate or assigning an unsuitable candidate to a temp contract.

Allow Loading of Other Users Saved Lists:

Each user of Eclipse is able to save lists of candidates, clients and vacancies for retrieval at a later date. Selecting this permission will allow the loading of lists saved by other users of the software.

Allow Batch Client Update:

Selecting this option, allows for the status of multiple client records to be updated e.g. changing the status from 'Active' to 'Inactive'. This is achieved via a button at the foot of the main interface.

Allow Batch Candidate Update:

Selecting this option, allows for the status of multiple candidate records to be updated e.g. changing the status from 'Active' to 'Found Own Job'. This is achieved via a button at the foot of the main interface.

Allow Batch Vacancy Update:

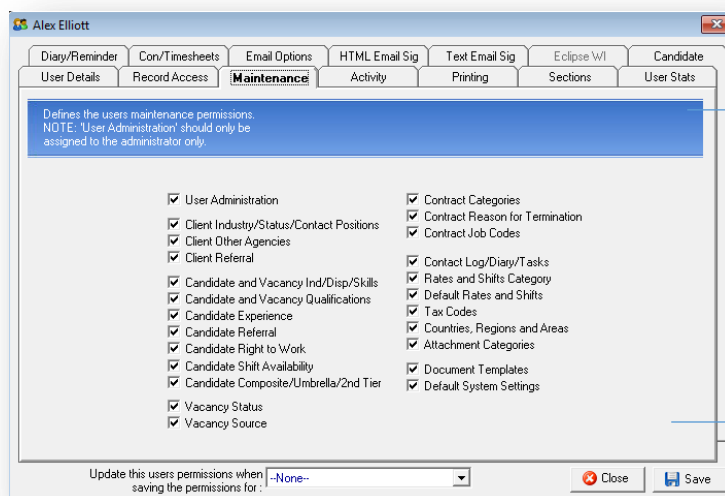
Selecting this option, allows for the status of multiple vacancy records to be updated e.g. changing the status from 'Unfilled' to 'Filled'. This is achieved via a button at the foot of the vacancy main interface.

2.3 Maintenance

The 'Maintenance' section allows the assignment of permissions for control over system maintenance and administration.

Note: Please select these options with care and seriously consider who is permitted access to the 'User Administration' screens.

Ticking a box within this tab will allow the user permission to access that particular section of the 'Maintenance Menu'. For example, ticking the 'User Administration' box allows the user access to the 'User Administration' menu. Access to this section would allow the user to grant themselves, and others, permissions to carry out any action within Eclipse therefore consider this permission carefully.



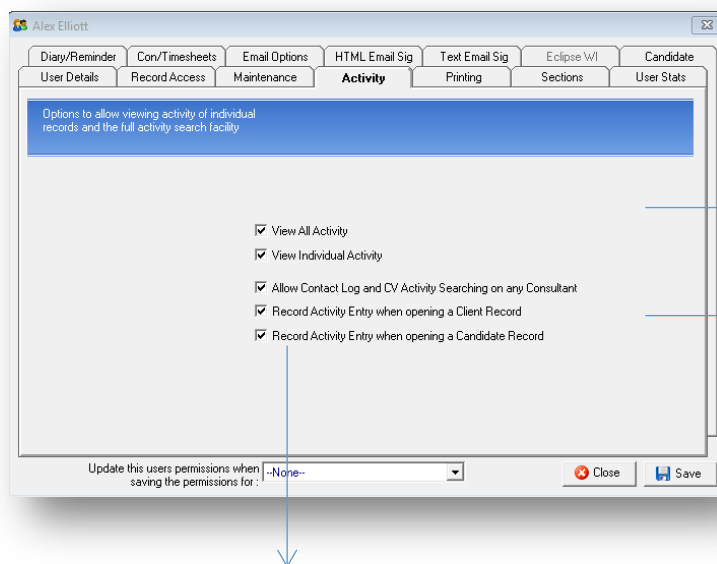
Please pay careful consideration to the permissions granted within this tab.

Placing a tick in the box will allow the user access to the corresponding section of the 'Maintenance Menu'

It is advisable to nominate one or two users of the system as 'administrators'. Administrators will require access to a combination of the fields within the 'maintenance menu'. Consider carefully which sections the 'administrators' are to have access to. The example above indicates access to all sections of the Maintenance Menu. This would only be suitable for Directors or senior members of staff. To discuss user permissions in more detail or obtain advice on this section, please contact the Eclipse support desk.

2.4 Activity

The fourth tab is the 'Activity' Section. This allows the administrator to define whether or not a user can view activity records that are logged by the system.



'View All Activity' is a management function that allows searches on clients, candidates etc.

'Contact log and CV activity searching' may be useful for consultants to keep track of their own activity

'Record Activity when opening a client and a candidate record' records when a user has opened a record.

View All Activity:

This option relates to a search feature in Eclipse where ALL activity undertaken within the system can be searched. This includes activity of a certain type e.g. when users are logging in and out or individual user activity and also gives the option to specify date parameters. This could be considered a management function.

View Individual Activity:

The 'individual activity' option allows viewing of specific client, candidate etc activity. This is accessed via individual records within Eclipse.

Allow Contact Log And CV Activity Searching On Any Consultant:

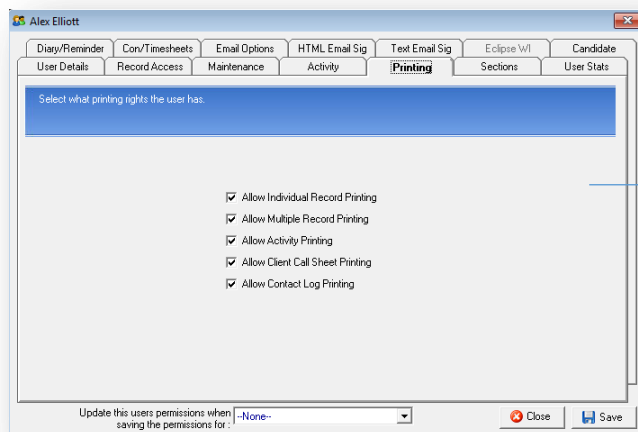
This option will allow searches on contact log entries and CV submissions by any user of the software.

Record Activity When Opening A Client Record:

The 'Record Activity when opening a Client and Candidate Record' records the activity of when a client and candidate record has been opened by who and when.

2.5 Printing

The 'Printing' Section enables the system administrator to allow or disallow printing of information and access to reports within the system.



Please pay careful consideration to the assignment of permissions relating to multiple record printing and client call sheet printing

Allow Individual Record Printing:

'Allow Individual Record Printing' relates to the 'print' button at the bottom of all records within Eclipse and will allow the output of that record in a report style format.

Allow Multiple Record Printing:

'Allow Multiple Record Printing' relates to the output of pre-configured reports from the printer bottom at the bottom of the main interface in each section. It may be advisable to restrict access to the printing of multiple records from the system.

Allow Activity Printing:

'Allow Activity Printing' allows the printing of individual or system activity which is a management feature.

Allow Client Call Sheet Printing:

'Allow Client Call Sheet Printing' allows the printing of a report that contains the contact information of selected clients. Amongst other things, this report contains the client name, postcode, contact name, e-mail address and telephone number. Be mindful of the consequences of allowing this particular permission.

Allow Contact Log Printing:

'Allow contact log Printing' allows you to print what is in view within the contact log.

2.6 Sections

The 'Sections' tab enables the Administrator to define which sections of the main interface are visible to the user. Ticking a section will ensure that it is visible. This is particularly useful where a user has limited responsibility within the system for example only adding details of candidates and clients therefore they are not required to use the vacancy / temp contract sections etc.

Removing the tick from any of the first 7 values (Client – Invoice) will hide the corresponding section of Eclipse from view

Select which sections of the database are available to the individual user.

- ☒ Client
- ☒ Candidate
- ☒ Vacancy
- ☒ Interview
- ☒ Temporary Contract
- ☒ Timesheet
- ☒ Invoice
- ☒ Management Information
- ☒ User Options
- ☒ Client Management Notes

Update this users permissions when saving the permissions for: --None--

Close Save

Selecting 'Client Management Notes' allows access to an otherwise hidden screen within a client record.

Access to client management information allows the viewing of analysis reports

Unticking the 'User Options' box stops the user from being able to change the user options in their profile

Selecting a user from the dropdown menu allows the administrator the ability to mirror another user profiles permissions.

Management Information:

Selecting 'Management Information' allows the user access to reports within the 'Analysis' menu on the toolbar at the top of the main screen. As suggested by the title, this permission is usually granted to those requiring access to management reporting and analysis.

User Options:

Unticking the user options stops the user being able to change the user permissions in their profile, such as their name and details, showing the diary at start up, using auto-caps facility, pop-up reminder notifications, contract alerts and changing the colour of their Eclipse background.

Client Management Notes:

Placing a tick by 'Client Management Notes' allows the user access to an otherwise hidden screen within the client record.

Update this users permissions when saving the permissions for:

By selecting a user from the dropdown menu allows the administrator the ability to mirror another user profile. The permissions are copied over once the selected user has been re-saved. Note any changes that are made to the selected user will be mirrored on any user profile that has selected username present in the 'Update this users permissions when saving the permissions for' window.

2.7 User Stats

There are no permissions to grant within the 'User Stats' section, this tab merely provides a snapshot of information showing exactly how many of each type of record has been assigned to a particular user of Eclipse and how many letters or emails they have outputted from the system. Clicking the 'Update Stats' button does as it suggests and updates the figures within this window.

The fields on the left indicate how many records of each type are assigned to the user

No. Clients	51	No. Logged In	245
No. Candidates	111	No. Records Created	4652
No. Vacancies	461	No. Records Amended	13260
No. Interviews	213	No. Documents Outputted	15129
No. Contracts	565	No. Interview Outcomes	383
No. Timesheets	1473		
No. Invoices	803		

Update Stats

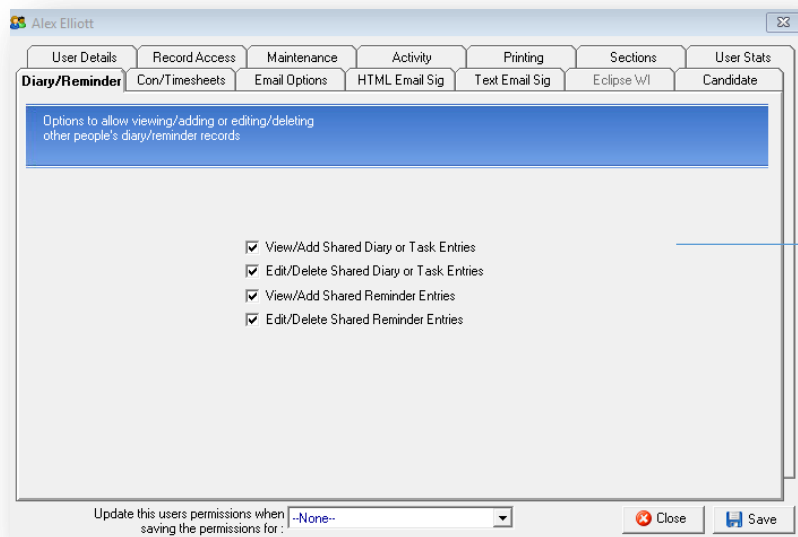
Update this users permissions when saving the permissions for: -None-

Close Save

The fields on the right explain how many times the user has logged in and out etc

2.8 Diary/Reminder

The options within this tab relate to shared diary entries, tasks and reminders. These options allow or disallow the user to view, add or edit other people's reminders, tasks or diary entries as well as their own.



Selecting these options allow the user to view, add or edit shared reminders, tasks and diary entries as well as their own

2.9 Contract/Timesheets:

The options within this section relate to the processing of timesheets within Eclipse, client invoicing details, candidate payroll information, exporting information from Eclipse and the management of various features relating to temporary recruitment. Starting on the top left hand side of the screen, the descriptions of each option are as follows. The first four options relate to processing of timesheets within Eclipse. This is a three step process consisting of processing, authorising and invoicing of timesheets.

The three stages of processing timesheets can be shared between users of the software

Permission can be granted to view and authorise candidate payroll information as well as client invoice details

Update this users permissions when saving the permissions for: -None- Close Save

These three tick boxes set whether the user can 'Approve' and/or 'Edit' Right to Work records and 'Book' candidates that are not compliant.

Ticking this box allows the user the ability to perform a contract search for the date candidates are assigned to contracts

Allow Process of timesheets:

This is the first step of the timesheet management and the point at which timesheets are first checked against the Eclipse record. Timesheets are processed on or after the last day that the timesheet relates to.

Allow Early Processing Of Timesheets:

Allowing 'early processing of timesheets' means that timesheets can be processed during any day that the timesheet relates to instead of following the final day on the timesheet.

Allow Authorisation Of Timesheets:

This is the second stage of the timesheet management process and occurs after the processing phase. This is usually the point at which the details are checked for the second time and amendments can still be made.

Allow Invoicing Of Timesheets:

The final step is to Invoice the timesheet which creates the invoice record within Eclipse. These stages have been broken down into permissions so that control measures can be taken with multiple users potentially sharing the different levels of responsibility along the chain.

Allow Adjustments Of Timesheets:

Adjustments to timesheets may take place once a timesheet has been invoiced. This action will create a new timesheet which will also need to be processed etc.

Allow Amending Of Timesheets:

Where information in a timesheet record needs changing after it has been authorised, this is called an amendment. Those with this permission can simply select the 'Edit' button in the record and amend the figures where required. Where permission has not been granted to make amendments and the 'Edit' button is selected, Eclipse displays a warning prohibiting the action.

Allow Viewing Of Candidate Payroll Information:

Selecting this option will allow access to view (but not amend) the 'Other Details' tab within candidate records which contains candidate payroll preferences, bank account details and AWR status. Where permission is denied, the 'Other Details' tab is entirely locked and cannot be viewed.

Allow Authorisation Of Candidate Payroll Information:

Selecting this option allows the user to edit the candidate payroll information within the 'Other Details' section and place a tick in the 'Payroll Information Authorised' tick box. This confirms the information is correct and locks the information for editing.

Allow Authorisation Of Client Invoice Details:

Selecting this option allows the user to confirm clients' invoicing preferences are correct. Once the 'Invoice Details Authorised' button is selected within a client record the details are locked for editing.

Allow Payroll Export:

Where an Eclipse payroll export bolt-on is activated, selecting this option will allow the user to perform the export of timesheet information from Eclipse into a CSV file which in turn can be imported into the designated payroll package.

Allow Setting Of Legal Hirer:

This related to the AWR functionality within Eclipse. By default this permission is set to 'disabled' for all users. This setting allows the setting of the legal hirer in a multi-client, multi-branch setup within Eclipse. This is particularly important as not correctly linking client records to the correct 'Legal Hirer' client record in Eclipse could cause multiple clocks for the same legal hirer to run concurrently but seemingly unconnected, potentially risking a candidate missing out on equal treatment.

Allow Override Of Locked AWR Contractor Status:

When a temp contract record is created in Eclipse, the AWR contractor status of the candidate is 'locked in' to the contract record. This enables Eclipse to know whether or not this contract needs to be considered for an AWR clock and can be manually changed at any point up to the time that the first timesheet is processed. This permission enables elevated privileges for the user to change the status after the first timesheet has been processed in the case that a contract has been included or excluded from AWR incorrectly.

Allow Adding To AWR Clocks Before Processed Days:

This permission allows for information to be added to a candidate's AWR clock before any related timesheets are processed. For example this information could be a break in employment due to sickness etc.

Allow Searching On The Candidates Assigned Date:

Ticking this box allows the user the ability to perform a contract search for the date candidates are assigned to contracts.

Allow Batch Setting Of Exported/Un-exported To Sage For Timesheets And Invoices:

The permission to allow batch setting of timesheets and invoices is only applicable where integration with a payroll and invoicing system is required. This setting allows a user to change the status of multiple records to exported or un-exported.

Prompt To Allow Booking When A Candidate Is Not Marked As Available Within The Availability Schedule:

This setting only applies where the default setting for the candidate schedule is to assume that the candidate is 'unavailable' unless otherwise specified. If that is the case, if ticked, this setting will still allow the candidate to be booked onto a temp contract even if they are not marked as available in their schedule. Eclipse will inform the user that this is the case.

Do Not Display Financial Information On Timesheet Tab:

If ticked this will not display the values in the 'hours' and 'Mark-up' columns on the timesheet tab along with the cumulative totals at the foot of the list.

Only Allow Preset Rates And Shifts To Be Selected When Creating Contracts:

This setting will only allow the user to select from default rates and shifts or those set up specifically for a client in the database. This prevents the user from creating temp contracts with ad-hoc pay rates for candidates and ad hoc invoice rates for clients. This setting is useful where all rates are pre-agreed with clients and the appropriate default templates are available.

Allow Changes To Pay Rates:

This is an extension of the previous setting and allows the amendment of candidate pay rates within default and pre-set rate and shift templates.

Do Not Allow Approval Of Candidate Right To Work Documents:

Selecting this option prevents the user from approving candidate right to work documents.

Do Not Allow Editing Of Candidates Right To Work Information:

Selecting this option prevents the user from making any changes to the right to work information.

Do Not Allow Booking Of Candidates Who Do Not Have The Right To Work Check:

This option prevents users from assigning candidates to temporary contracts where they do not comply with the candidate right to work feature. E.g. the candidate has documents outstanding.

Do Not Allow Termination Of Contracts:

If ticked, this option will not allow the user to terminate temp contracts.

Allow Access To Auto SMS Report:

Where the Auto SMS feature is enabled, selecting this option allows access to a report via the 'Tools' menu, detailing SMS activity within Eclipse.

Show Contract Alerts Screen At Login – All/Own/Division:

These settings apply to the 'contract alerts' feature. This details contracts that have ended without the assignment of a candidate and have therefore 'timed-out', and unassigned contracts that have started but not yet finished are therefore still have potential to profit. This alert will appear at log-in and will provide details of either 'all' contracts that fall into the above criteria, the users 'own' contacts or their 'divisions' contracts.

2.10 Email Options:

Use The Eclipse Default Preferences For Sending Email For This User:

Eclipse allows different methods for sending Email. These are set in the 'Eclipse Default Preferences' section of the Maintenance menu but can be overridden on a per user basis via this screen. The usual option is to have a tick in the first tick box 'Use the Eclipse Default Preferences for sending e-mail for this user' which means that this particular user is going to use the same method as allocated in the default preferences.

In many cases, the first option is selected here which means the user will have the same method as allocated in default preferences

Where the 'Broadbean' bolt-on is activated, indicate whether default preferences apply to the username and password or specify the individual details of the user

Emails can be sent either via Microsoft Outlook in which case the emails are created by Eclipse and placed into the Outlook Outbox for sending, or alternatively Eclipse will allow the sending of e-mails directly though the SMTP server as provided by the ISP. (This would be the preferred method for performance if you are planning on sending out bulk email shots but has the disadvantage that the emails are recorded in the Sent Items folder in Outlook)

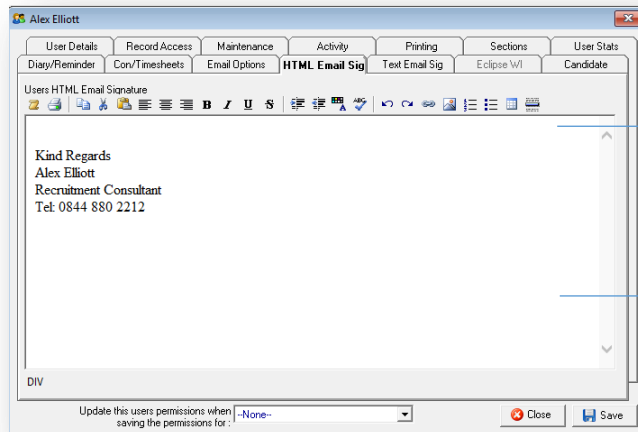
Note: The username, password and port are only required if the mail server requires authentication or runs on a specific port other than the standard outgoing email port of 25. (If in doubt, contact your network administrator for advice on these settings.) Further to this, the 'Send emails via Local Host' option is generally not required and relates to users that have problems sending email via Eclipse because they use older versions of Microsoft Exchange to send emails.

Use The Default Settings For Posting To Broadbean For This User:

The final tick box indicates whether default preferences apply to the username and password or specify the individual details of the user.

2.11 HTML Email Signature:

This section allows the creation of an Email signature for use with HTML email templates. To insert an image or logo into the signature, select the 'Insert Image' icon from the toolbar at the top of the window. The text size, font and colour may also be altered.

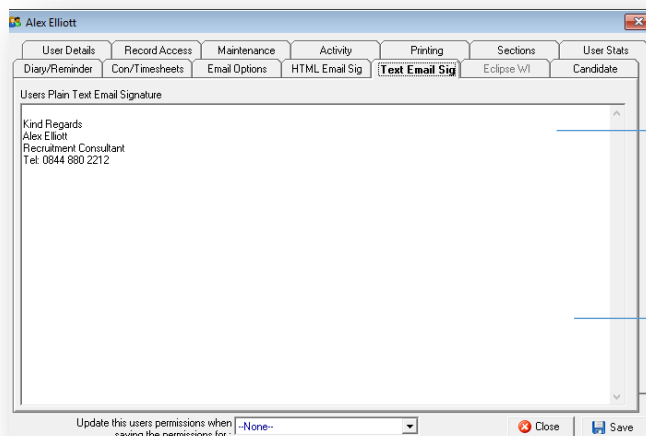


Insert an image or logo into the signature using the 'Insert Image' button

This signature will appear at the bottom of all HTML email templates

2.12 Text Email Signature:

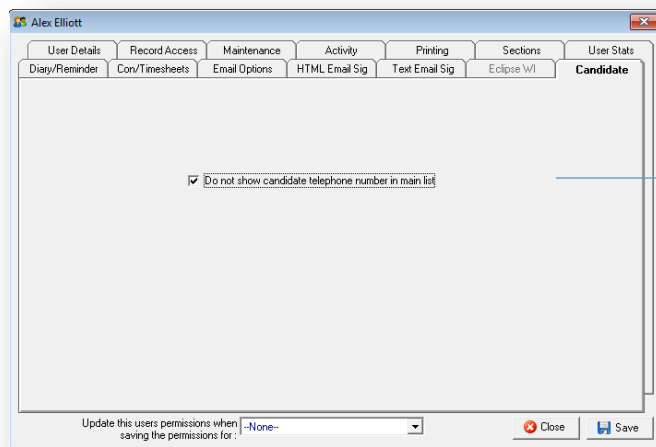
This is similar to the previous 'HTML E-mail Sig' section, but allows the creation of an e-mail signature for use with plain text emails. The size, font and colour cannot be amended. The spell check is not available and Images cannot be used with text only e-mails.



This email signature is for use with text only email templates

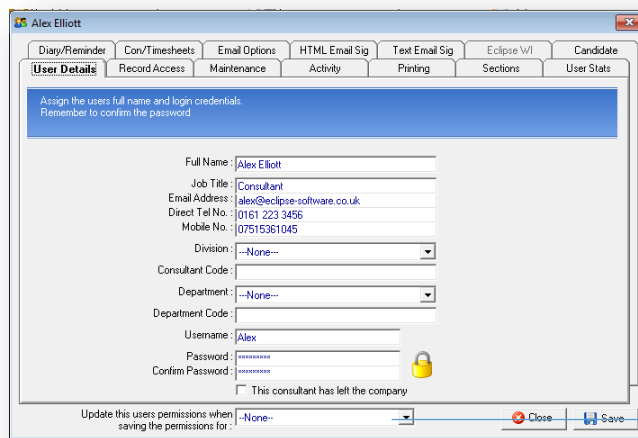
This size, font and colour of email templates cannot be amended

2.13 Candidate:



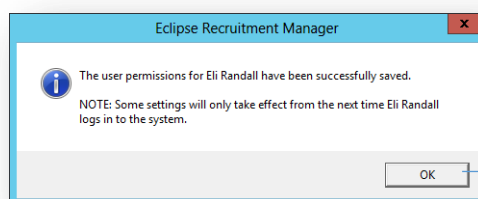
Placing a tick in the 'Do not show telephone number in the main list' will stop candidate telephone numbers being displayed in the main candidate window

2.14 Updating User Permissions:



Selecting a user within the 'Update this users permissions when saving the permissions for' window allows you to mirror the user profile you have selected. The profile is updated when the selected user profile is saved

Once the user's profile is complete or amended as required, select 'Save'. As per the notification below, any changes will only take effect from the next time the user logs into Eclipse.



As per the notification, any changes will take effect from the next time the user logs in

3. Eclipse Default Preferences

This section of the 'Maintenance Menu' is vital to the configuration of the software as it defines the global default preferences within Eclipse. Similarly to the 'User Administration' section explained earlier in this guide, the options are grouped by section on a series of tabbed pages.

3.1 General:

The following screen allows for the completion of general default preferences. Where changes are made, the alterations will only take place once the user logs out of Eclipse and back in again:

The 'Default Country' setting becomes the 'home' country and will appear on all new client and candidate records

This section defines the preferred option for outgoing e-mails through Outlook or the SMTP server

Exported File Path' sets the preferences for saving any exported files from Eclipse

Default Country:

The default country is the home country. This will determine the default value for the country setting throughout Eclipse. For example when creating a new client record it will automatically set the country to whatever is selected in this dropdown. The option 'Use this default country on search forms', if checked, will populate the country field on search forms with whatever is set as the default country. If left blank the default option will be to 'search on all countries'.

Default Currency:

The default currency selector uses the 'Currency Table' configured within the Maintenance Menu to provide a list of options. The currency selected here will be the default currency for all invoices. Also displayed is the description and currency symbol.

Send Emails Through MS Outlook:

The next section defines the preferred option for outgoing e-mails, whether it's through MS Outlook or directly to the SMTP server. If using Outlook then e-mails are placed directly into the Outlook email outbox and Outlook will do the rest using the default email account. Otherwise Outlook will be bypassed and the SMTP server will send the email.

Remove 'Sent Items' Before:

In instances where mass mail shots are sent widely and frequently it is advisable to periodically remove emails from the sent items folder. This will speed up the rate at which mass mailings can be produced in Eclipse. Please note that any emails removed from here will still be visible in the related contact logs.

Admin Skeleton Key Password:

This allows for the creation of a 'master' password which can be used to open any user account. This should only be shared with and used by the administrators of the system.

SMS Gateway:

This section need only be configured where a provider other than 'SMS to E-mail' is providing the text message service. In that case, enter the domain name in this field.

Exported File Path:

Finally, the 'Exported File Path' sets the preferences for saving any exported files from Eclipse e.g. timesheet and invoicing files for Sage, Tempest, Tempaid etc.

Enable Consultant And Division On Client Records:

Enabling this option provides additional fields whereby a consult and division can be specified for each individual client contact instead of the client records as a whole. Additional searching and permission lock features are also enabled if this option is activated.

3.2 Candidate:

This tab sets the default preferences for candidate related features in Eclipse:

Send out CV's can be configured from an exact copy of the original CV or from a template

Automatically setting send-out CVs to approved by-passes the safety net that prevents CV's being emailed to a client before they have been manually approved

'Default Pay Type' sets the pay type for all new candidates added into Eclipse

The first two options on this tab define how Eclipse deals with send-out versions of candidate's CVs. When a candidate's original CV is imported into a candidate record, Eclipse automatically saves a send-out version of the CV. How the send-out CV appears at this point depends on the option selected here:

Create Initial Send-Out CV From The Original:

This option will save an exact copy of the candidate's original CV as the send-out version. This can then be edited as required before being saved and issued to clients.

Create Initial Send-Out CV From Template:

The second option 'Create initial send-out CV from template' will save a blank CV template as the send-out CV. The template is configured in the Document Templates section of the Maintenance Menu under MS Word Template Masters. This is outlined earlier in this guide. This Word document serves as a starting point to creating CVs. Information can be copied from the original CV and pasted into the template or the CV can be totally re-written.

Automatically Set Send-Out CVs To 'Approved':

By default, candidate's send out CV's cannot be attached to e-mails and sent to clients until they have been manually approved in Eclipse. However, selecting 'automatically set send-out CV's to 'Approved' will by-pass this safety net. Please note that selecting this option potentially allows for candidate CV's to be issued to clients complete with contact details. Therefore only select this option where that is acceptable.

Make Found Own Job Employer Mandatory:

This option relates to a Candidate's status in Eclipse. Where the status is changed to 'Found Own Job', this option forces the input of date e.g. the name of the company where the candidate is going to work and their estimated start date. In addition to this, it is then possible to run a pre-configured report from the candidate section detailing candidates who have found their own jobs within a specified period of time.

Default Pay Type:

The default pay type sets the pay type for all new candidates added into Eclipse. The options are BACS, printed cheque, manual cheque or cash. Regardless of the default preference, this can be changed on individual candidate records as required.

Include Candidates, Vacancies And Contracts In Division Searches Based On Both The Record's Division And Also The Related Discipline Division:

This option relates to the divisional search feature in Eclipse. It is possible to search for any record based on division. Generally, this would be the division in which the owner of the record is assigned to. Additionally, it is possible to assign 'Disciplines' (job titles) to a division. Where this feature is implemented and the option selected within this window, when searching for candidates, vacancies or temp contracts based on Division, Eclipse will return results relating to both the owner of the record and the discipline.

Default Candidate Status:

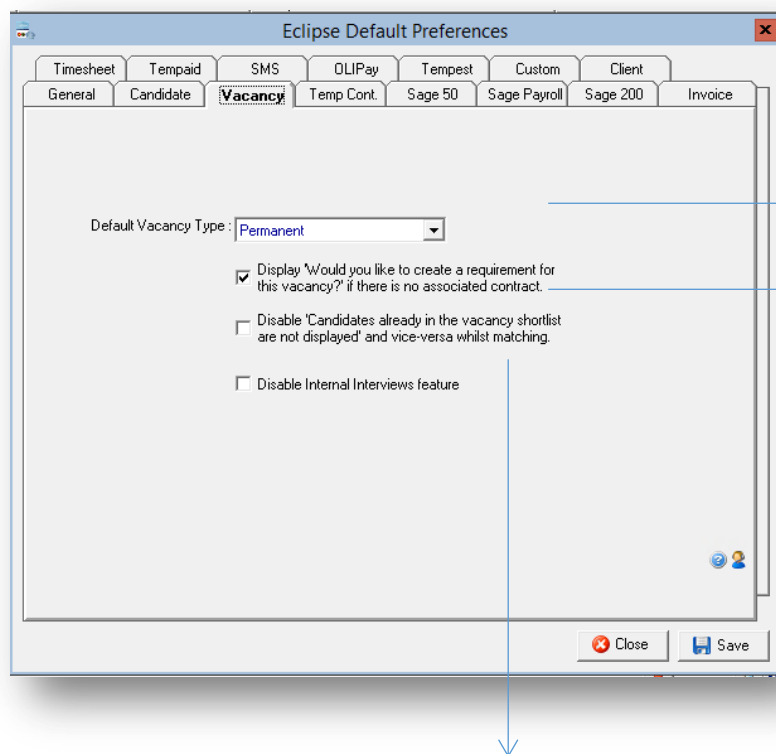
This option allows for the default status setting for newly added candidates. The options are: Active, Inactive and Pre-Screened. This is initially set to 'Active' but can be changed as required.

Treat Pre-Screened Candidates As 'Active' Candidates For Matching And CV Searching:

Where the default setting for newly added candidate records is set to 'Pre-Screened' this tick box will treat these candidates as 'Active' for the purpose of matching and CV searching.

3.3 Vacancy:

This screen sets the default preferences for vacancy related features in Eclipse:



'Default Vacancy Type' determines what the vacancy 'type' defaults to for all new vacancy records

This option activates a prompt to create a temp contract where there is currently no associated unfilled contract for that vacancy

This option will exclude candidates from 'match' results if the candidate is already shortlisted against that vacancy

Default Vacancy Type:

This option determines the vacancy type when creating new vacancy records in Eclipse. The options are permanent, temporary or contract. The default option can be over-ridden on a per vacancy basis when required.

Display 'Would You Like To Create A Requirement For This Vacancy?' If There Is No Associated Contract:

Selecting this option will activate the above reminder. For example, where a vacancy type is set to either temp or contract, and there is no associated, unfilled temp contract, the message box will be displayed reminding to the user to set up the temp contract.

Disable 'Candidates Already In The Vacancy Shortlist Are Not Displayed' And Vice Versa Whilst Matching:

Selecting this option will exclude candidates that have already been shortlisted for a particular vacancy in the 'Match' results.

Disable Internal Interviews Feature:

Finally, 'Disable Internal Interviews feature' removes the option for an internal interview type.

3.4 Temp Contract:

This tab sets the default values relating to temp contracts and contains the settings for the options described earlier in the Rates & Shifts section. These are the starting values that are initially selected when creating any new temp contract or rate and shift template from a client record or indeed global templates via the Maintenance Menu. Other options define additional aspects of the Contract's behaviour.

These are the % at which candidate holiday pay and employers NI are calculated

This box defines whether blank days in a candidates schedule should be treated as unavailable instead of available

These options define timesheet frequency and period end

Eclipse Default Preferences

Timesheet Tempaid SMS OLIPay Tempest Custom Client
General Candidate Vacancy **Temp Cont** Sage 50 Sage Payroll Sage 200 Invoice

Set the rate (%) to be used when calculating... Rate Known: **The pay rate and invoice rate is known**

WTD Rate: **12.07** % Work To: **Work to a hourly markup**

Employers NI Rate: **13.08** % Margin On: **Charge rate**

☒ AWR Enabled
AWR Alert at: **Week 10**

☐ Always assign candidates to an existing AWR clock if present

☐ Assume Candidates to be unavailable unless marked available in the schedule

☐ Use Enhanced Schedule and Matching

Availability Limit: **100**

Timesheet Freq: **Fortnightly**

Period End: **Friday**

☒ Show Contract Start Date on Process Timesheets by Image form instead of Period End

☒ Include Employers NI

☒ Include holiday Pay (WTD)

☐ Enter All Figures Manually

☐ Use VAT Friendly Scheme

Charge VAT on markup only for self employed or composite/umbrella candidates

Charge client: **150** % of expenses cost

Def. CIS Type: **Gross Payments 0%**

☒ Include Holiday Pay with Candidate Payment

☐ Holiday pay is included in the pay element

☒ Holiday pay is paid as a separate element

Close Save

WTD Rate:

This is the percentage at which candidate holiday pay (Working Time Directive) calculations should be made. All new temporary contracts will display this value and will calculate candidate's holiday pay entitlement accordingly.

Employers NI Rate:

This is the percentage at which Employers National Insurance is calculated in Eclipse and is set to 12.8%. This calculation does NOT take into consideration the 'free pay' element where National Insurance is not applicable to the first portion of an employees' wage. The reason being that this allowance may have already been applied to a candidate's wage paid elsewhere and is therefore not applicable.

AWR Enabled (tick box):

This is the system default setting to enable / disable the AWR clock system. This setting is automatically enabled where the default country is set to 'United Kingdom'.

AWR Alert At:

Selecting a week in this field will mean that all Contracts with a clock at that stage or afterwards will be included in the contract warnings in the 'Contract Alerts' screen.

Always Assign Candidates To An Existing AWR Clock If Present (tick box):

Ticking this box will automatically link a candidate to an existing AWR clock with the same legal hirer if there is one already in existence.

Assume Candidates To Be Unavailable Unless Marked Available In The Schedule:

This tick box defines whether or not blank days in a candidate's schedule are to be treated as available or unavailable. By default, Eclipse assumes that a blank day is available unless otherwise marked. Selecting this option will reverse the feature and consider candidates to be 'unavailable' unless marked as 'available' in the schedule.

Use Enhanced Schedule And Matching:

This tick box enables the enhanced schedule and matching feature where candidates can be assigned as available for certain shifts or hours rather than the day as a whole. This feature should be used in conjunction with the 'Candidate Shift Availability' and 'Candidate Reason for Unavailability' sections of the Maintenance Menu.

Availability Limit:

When performing a candidate match against a vacancy the amount entered will be the maximum amount of candidates that will be shown. It is set to 100 by default but can be made higher or lower if required.

Timesheet Frequency:

The frequency at which timesheets are due.

Period End:

This is the last day of the week that the timesheet relates to.

The 'Rate Known' list specifies what values are known when negotiating fees.

The screenshot shows the 'Eclipse Default Preferences' window with the 'Temp Cont' tab selected. The 'Rate Known' dropdown is set to 'The pay rate and invoice rate is known'. The 'Work To' dropdown is set to 'Work to a hourly markup'. The 'Margin On' dropdown is set to 'Charge rate'. The 'Availability Limit' is set to 100. The 'Timesheet Freq' is set to 'Weekly'. The 'Period End' is set to 'Friday'. There are also checkboxes for 'AWR Enabled', 'Include Employers NI', 'Include holiday Pay (WTD)', 'Enter All Figures Manually', 'Use VAT Friendly Scheme', 'Charge VAT on markup only for self employed or composite/umbrella candidates', 'Use Enhanced Schedule and Matching', 'Charge client: 150 % of expenses cost', 'Def. CIS Type: Gross Payments 0%', 'Include Holiday Pay with Candidate Payment', 'Holiday pay is included in the pay element', and 'Holiday pay is paid as a separate element'. A checkbox at the bottom is checked for 'Show Contract Start Date on Process Timesheets by Image form instead of Period End'.

This option specifies whether fees are calculated based on mark-up or margin

'Margin On' specifies what the margin is calculated as a percentage of

The three drop down lists at the top right hand side set the default values which help to calculate rates in Eclipse. These will also be copied through to all new temp contracts created in Eclipse.

Rate Known:

The 'Rate Known' list specifies what values are known when negotiating fees. The four options are:

- The pay rate is known
- The charge rate is known
- The invoice rate is known
- The pay rate and invoice rate are known.

For the purpose of Eclipse, the definitions of 'pay rate', 'charge rate' and 'invoice rate' are:

- Pay rate: The gross pay the candidate will receive per unit of work (e.g. hourly/daily)
- Charge rate: The cost to the agency (pay rate + WTD + Employers NI)
- Invoice rate: The cost to the client

Work To:

The second list 'Work To' specifies whether fees are calculated based on a mark-up or margin.

Therefore the two options are as follows:

- Work to an hourly mark-up: A fixed value in £'s per hour/day
- Work to an hourly margin: A percentage calculated on a choice of values

Margin On:

'Margin On' specifies what the margin is calculated as a percentage of:

- Pay rate only
- Pay rate and WTD
- Charge rate
- Invoice Rate

If selected, the corresponding tick boxes within each new temp contract will also appear checked.

The expenses option sets the default value for passing on candidate expenses to clients.

Include Employers NI:

The first tick box on the right hand side will, by default, tick the 'Include Employers NI' box on all new temp contracts and rate and shift templates.

Include Holiday Pay (WTD):

Ticking 'Include holiday pay (WTD)' ticks the corresponding box on all new contracts.

Enter All Figures Manually:

Selecting 'Enter All Figures Manually' does exactly as it suggests and unlocks all fields for manual entry.

Use VAT Friendly Scheme:

If the 'Use VAT Friendly Scheme' option is ticked, by default any contracts that are created for self employed or PSC/Umbrella candidates will only charge VAT on the mark-up portion of the invoice rather than the whole amount.

Expenses:

The expenses option sets the default percentage of candidate expenses to be charged back to clients. This potentially allows for a percentage increase to be added onto expenses costs or the percentage of expenses reduced, e.g. sharing expenses costs with clients. To add a mark-up, increase the percentage as required. E.g. to add 10% set the value to 110%. To split the cost in half, add a percentage value of 50%. This is only a default value and can be overridden on a per contract basis.

Default CIS Scheme:

This is the 'Construction Industry Scheme' and is only applicable to contracts associated with contractors in the construction industry. For these candidates it is compulsory to be CIS registered. In terms of Eclipse, this means that candidates are paid as contractors but a percentage of their gross total pay is deducted through the CIS scheme and passed onto the Department of Work and Pensions. Choose the default option from the three available in the drop down menu, these are: Gross Payments 0%, Nett Deductions 20% and Net Deductions 30%. This percentage will be carried through to all candidate records where the CIS box is ticked. However, the option to change the percentage is available in the candidate record itself.

Include Holiday Pay With Candidate Payment:

This option relates to the export of information to Sage Payroll. Where this box is ticked the holiday pay value will be exported to Sage. If not ticked then no holiday pay value is exported. This is the master setting however this can be changed on a per contract basis.

Holiday Pay Is Included In The Pay Element:

This option allows for instances where candidate's holiday pay is included within their basic pay rate instead of 'in addition to' their basic pay. In instances where this option is selected, the WTD (Working Time Directive) column within the rate calculations should be left at £0.00.

Holiday Pay Is Paid As A Separate Element:

The final option on this screen allows for instances where candidate's holiday pay is calculated in addition to their basic pay rate instead of 'including' it in their basic pay. In instances where this option is selected, the WTD (Working Time Directive) column within the rate calculations will display the holiday pay value.

3.5 Sage Line 50:

Note: This tab need only be configured where information is to be exported to Sage 50 Accounts and the corresponding bolt-on is activated.

The screenshot shows the 'Eclipse Default Preferences' window with the 'Sage 50' tab selected. The 'Invoice Export' section contains four text boxes for Sales Nominal Codes (Default, Permanent, Temporary, Contract) all set to '1234', and a Default Department Code set to '001'. The 'As Purchases' section has four text boxes for Purchases Nominal Codes (Self Employed, Self Employed + CIS, PSC/Umbrella, 2nd Tier Agency) all set to '5000'. The 'As Contractors' section has four text boxes for Balance Sheet and P+L codes (Contractor Cost of Sales, Contractor Input VAT, Contractor Cost of Sales, Expenses) set to '2000', '2000', '6000', and '6000' respectively. Arrows from the right-pointing text point to the '1234' codes, the '5000' codes, and the '2000'/'6000' codes.

These boxes relate to the invoice export and allow the configuration of Sales Nominal codes for perm, temp and contract placements

When treating contractors as purchases, enter the corresponding Sage 50 Accounts nominal codes

Enter the 'balance' sheet and 'profit and loss' codes recommended to be in the '2000's' and '6000's' respectively

Invoice Export:

The first four boxes relate to the invoice export and allow for the configuration of sales nominal codes for permanent, temporary and contract placements as well as the default department code.

Purchases Or Contractors:

In terms of exporting contractor timesheet information from Eclipse to Sage 50 Accounts, there are 2 options:

1. Treat each self-employed contractor, PSC/umbrella candidate and second tier agency candidate as a supplier and therefore each timesheet effectively as a purchase invoice.
2. Treat timesheets from self-employed contractors, PSC/umbrella candidates and second tier agency candidates as contractor wage expenses rather than purchases.

Option 1 - Purchases:

The nominal codes used to post purchases of these types must be entered in the 'Purchases Nominal Code' boxes. Typical values for these may be in the 5000 range of nominal codes. Whichever codes are entered MUST correspond to an actual code in Sage 50 Accounts or the import will generate errors.

Option 2 - Contractors:

Four nominal codes are required, two for the balance sheet for the total contractor cost of sales and associated VAT, both of which, are recommend to be in the 2000 range of nominal codes and two boxes for profit and loss reporting for the total contractor cost of sales and the expenses costs, both of which are recommend to be in the 6000 range of nominal codes.

3.6 Sage Payroll:

Note: This tab need only be configured where information is to be exported to Sage 50 Payroll and the corresponding bolt-on is activated.

There are 3 further pay element boxes: Multiple, WTD and Expenses

The pay element reference number from Sage 50 Payroll for this pay element should be entered into the corresponding box on this tab in Eclipse

Within this tab there are 13 boxes each relating to a pay element within Sage 50 Payroll. In the first column there are 10 boxes corresponding to each of the possible pay elements available in any Eclipse contract record. A corresponding pay element should be configured for each of these in Sage 50 Payroll with default details selected. The pay element reference number from Sage 50 Payroll for this pay element should be entered into the corresponding box on this tab in Eclipse.

It is advisable to standardise each of the pay elements for all new contracts. For example, each new contract created in Eclipse will need to follow the same pattern for pay rates. For example: The 'Standard' field should always be used for the basic rate of pay, the OT1 line for Time x 1 ½ etc. The same pattern should apply regardless of client, vacancy, candidate etc.

It is a good idea to map out all of the various pay types as these will require configuration not only in Eclipse but also Sage 50 Payroll. It is important that the pay elements correspond with each other in both pieces of software.

Multiple:

This allows for a single unit of gross total pay E.g. if the candidate has been paid for multiple timesheets in the same pay period with different standard pay rates. Eclipse calculates the value this way because the two timesheets could possibly have different basic rates which would not be supported by the standard import file for Sage 50 Payroll.

Therefore, in the case of multiple timesheets for the same candidate in the same period, Eclipse will lump together all the pay elements e.g. standard, OT1, OT2 etc. and calculate a total sum. In Sage this would appear as 'Multiple Timesheets'

However, Eclipse will produce a report to breakdown the multiple pay rates for candidates if there are any queries from candidates as to the various elements making up their total gross pay. This report is available in the timesheet tab in Eclipse. Within this report, 'Pending' refers to timesheets that have not yet been exported to payroll and 'History' refers to exported timesheets.

WTD:

This box is for any holiday pay that may be exported alongside candidate's other pay. This is assuming the candidate is paid holiday pay at source on top of their other pay.

Expenses:

This allows for any expenses that may or may not be paid as part of the candidate's payment.

3.7 Sage 200:

Note: This tab need only be configured where information is to be exported to Sage 200 and the corresponding bolt-on is activated.

Default nominal codes must be entered within these fields to ensure a successful export

Within this tab there are a number of fields for you to submit the relevant nominal codes for export to Sage. When all the codes have been entered into Eclipse the final stage is to update all records with the new details. This can be accomplished by selecting the 'Update All Records' radio button within the tab.

3.8 Invoice:

The settings in the 'Invoice' tab set the default values for payment terms, invoice templates for the batch printing option and invoice referencing. Please note that invoice terms and templates can be altered on an individual client level where required. Additional invoice templates can be created in the 'Document Templates' section of the 'Maintenance Menu'.

'Invoice Prefix' specifies what will appear before the reference number on invoices generated in Eclipse

'Invoice Offset' alters the starting point for invoice numbering in Eclipse

Default Invoice Payment Terms:

This option specifies the default payment terms to be carried through to client records and subsequently invoices. Please note that this value can be amended where necessary on a per client basis.

Default Batch Invoice Template:

Within Eclipse there is the functionality to batch print invoices. This option sets the default invoice template which will be used in the event of a batch print run. Upon purchase of Eclipse, the system provides two basic example templates, one suitable for permanent invoices and a second for temporary invoices. These templates can be amended as required or completely new versions configured. Selecting the drop down menu here will display all templates configured in relation to invoices. Choose the option which is most likely applicable to the majority of clients. Please note that within each individual client record the template option can be amended if necessary.

Invoice Prefix:

The invoice prefix field specifies what will appear before the reference number on invoices generated in Eclipse. 'PIN' is the default but this can be altered as desired.

Invoice Offset:

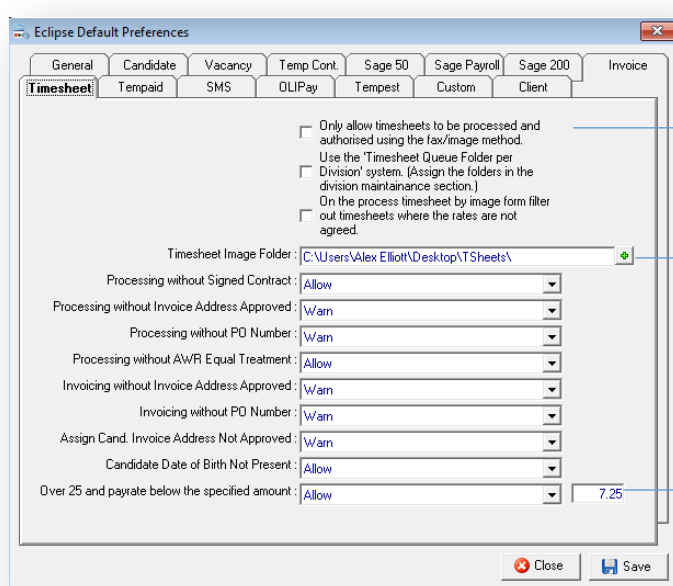
'Invoice Offset' alters the starting point for invoice numbering in Eclipse. For example, if the final invoice number of an existing system stands at 99 and the first invoice to be generated in Eclipse needs to be 100, then the invoice offset would be 99.

Only Allow Client Invoice Address To Be Selected Using The Client Branches System:

Within the 'Branches / Financial' tab of each client record it is possible to enter an invoice address for the client that differs from the client address entered on the 'Client Details' tab. Where this option is left un-ticked the invoice address can be manually typed or selected from a drop down list of related branches. Where this option is ticked, only the address of a related branch can be selected.

3.9 Timesheet:

The next tab of Eclipse Default Preferences relates to timesheets and the options related to the process, authorisation and invoicing of those timesheets in Eclipse.



This option only allows timesheets to be processed and authorised using the fax/image method

Use the green '+' button to specify the folder in which faxed images of the timesheets will be saved

By adding a value in this section allows you to set the national living wage for candidates over the age of 25

Only Allow Timesheets To Be Processed And Authorised Using The Fax/Image Method:

Placing a tick in this box prevents the processing and invoicing of timesheets using any method other than the fax / image feature.

Use The 'Timesheet Queue Folder Per Division' System:

Where users are assigned to a division and the fax / image method is employed to process and authorise timesheets, selecting this option will allow for a queuing system. For example, in the instance where there are three divisions within a company, a timesheet folder per division can be configured. As the timesheets come in via the faxed image method they can then be saved into the relevant folder.

To assign a timesheet folder to a division, re-visit the user administration section of the maintenance menu and double click on a division. Locate the folder via the green '+' button which will open the Windows file manager.

On The Process Timesheet By Image Form, Filter Out Timesheets Where The Rates Are Not Agreed:

As it suggests, selecting this option will only display timesheets records if their rates have been agreed with the client.

Timesheet Image Folder:

Where timesheets are to be processed and authorised using the fax / image method but NOT the timesheet queuing system, use the green '+' button to open the Windows file manager and locate the folder in which the timesheets will be saved.

Processing Without Signed Contract:

This option is a control feature associated with signed contracts. Where a copy of a signed contract is not present in the temp contract record in Eclipse the preference can be set to simply 'Allow' the processing of associated timesheets, 'Warn' that a copy of the contract has not been attached but still allow the processing of timesheets or 'Prevent' the processing of any associated timesheets until the signed contract has been attached.

Processing Without Invoice Address Approved:

Where a client's invoice address has not been approved within the 'Branches / Financial' tab of the client record, this option will either 'Allow', 'Warn' or 'Prevent' the processing of any associated timesheets until it has been approved.

Processing Without PO Number:

Where it has been specified in the 'Branches / Financial' tab of a client record that a purchase order number is required on any associated invoices before they can be paid, this option will either 'Allow', 'Warn' or 'Prevent' the processing of any timesheets until the purchase order number has been entered into the associated temp contract record.

Processing Without AWR Equal Treatment:

Every Contract that is created and eligible for AWR has a tick box which defines whether or not the rates associated with that Contract can be deemed to be equivalent to Equal Treatment Comparators. Eclipse has a function that will allow the decision of whether to "Warn", "Block" or "Allow" when trying to process a timesheet that does not have this tick box ticked. The default value when the update is installed is "Warn" which will display a pop up warning to the user but give them the option to process the timesheet anyway.

Invoicing Without Invoice Address Approved:

Where a client's invoice address has not been approved within the 'Branches / Financial' tab of the client record, this option will again 'Allow', 'Warn' or 'Prevent' the invoicing of any associated timesheets until it has been approved.

Invoicing Without PO Number:

Where it has been specified in the 'Branches / Financial' tab of a client record that a purchase order number is required on any associated invoices before they can be paid, this option will again 'Allow', 'Warn' or 'Prevent' the invoicing of any associated timesheets until the purchase order number has been entered into the associated temp contract record.

Assign Candidate Where The Client Invoice Address Not Approved:

Where a client's invoice address has not been approved and a candidate is assigned to a related temp contract, Eclipse gives the options to either 'Allow' the candidate to be assigned, 'Warn' that the client's invoice address has not yet been approved or 'Prevent' the candidate from being assigned. This is particularly useful in temporary and contract recruitment where it is imperative that the correct invoicing preferences have been configured as these preferences impact on timesheet and invoice management within Eclipse.

Candidate Date Of Birth Not Present:

If the candidate's date of birth is not present on the candidate record, then Eclipse can 'Warn' you that the date of birth is not present, 'Allow' will let you save the candidate record without a date of birth present and 'Prevent' will not let you save the record without a date of birth present. This permission is connected to the national Living wage on the next paragraph.

Over 25 And Below The Specified Amount:

If a candidate is over the age of 25 and below the threshold stated Eclipse can 'Warn' you that the candidate is 25 or above and below the threshold at the point of being assigned to a contract, 'Allow' will ignore that the candidate is below the threshold at the point of being assigned to a contract, and 'Prevent' will stop you from assigning a candidate to a booking if aged 25 or above and below the set threshold.

3.10 Tempaid:

This tab need only be configured where information is to be exported to Tempaid and the corresponding bolt-on is activated in Eclipse.

The screenshot shows the 'Eclipse Default Preferences' dialog box with the 'Tempaid' tab selected. The dialog has a title bar with a close button. Below the title bar are several tabs: General, Candidate, Vacancy, Temp Cont., Sage 50, Sage Payroll, Sage 200, Invoice, Timesheet, Tempaid, SMS, OLIPay, Tempest, Custom, and Client. The 'Tempaid' tab is active, showing a 'Tempaid Company ID' field and four expense code fields: 'Expenses' (EXPN), 'Expenses Accommodation' (ACOM), 'Expenses Travel' (MILE), and 'Expenses Other' (FOOD). At the bottom right are 'Close' and 'Save' buttons.

This 'Tempaid Company ID' is a two digit code and is usually set to 'DE'

Tempaid Company ID:

This is a two digit code and is usually set to 'DE'.

Expenses, Expenses Accommodation, Expenses Travel And Expenses Other:

These are usually 4 character codes and must correspond with those configured in Tempaid itself.

3.11 OLI Pay:

This tab need only be configured where the OLIPay bolt-on is activated in Eclipse. Where this is the case enter the OLIPay Office Number in the field provided.

The screenshot shows the 'Eclipse Default Preferences' dialog box with the 'OLIPay' tab selected. The 'OLIPay Office Number' field contains the value '12'. The 'Close' and 'Save' buttons are at the bottom right.

Where the OLIPay bolt-on is activated, enter the OLIPay Office Number

3.12 Tempest:

This tab need only to be configured where the Tempest bolt-on is activated in Eclipse. Where this is the case, enter the Tempest Company ID and the 'Timesheet Prefix' in the fields provided.

The screenshot shows the 'Eclipse Default Preferences' dialog box with the 'Tempest' tab selected. The 'Tempest Company ID' field is empty. The 'Timesheet Prefix' field is empty. Below these fields is a checkbox labeled 'Set All CIS records to be re-exported to Tempest'. The 'Close' and 'Save' buttons are at the bottom right.

Enter the 'Tempest Company ID'

Enter the 'Timesheet Prefix'

3.13 Custom:

The next tab of Eclipse Default Preferences relates to the addition of 'Custom' drop down menus, custom fields can be added to the system and marked against the client and candidate records. You can add a maximum of ten custom fields in either the client record and also in the candidate record. Once created the 'Custom Fields' can be searched upon from the client search and also the candidate search features.

Add the 'Option' here. This can be either numerical or alphabetical. To allow a dropdown menu the value will need to be separated with a semicolon.

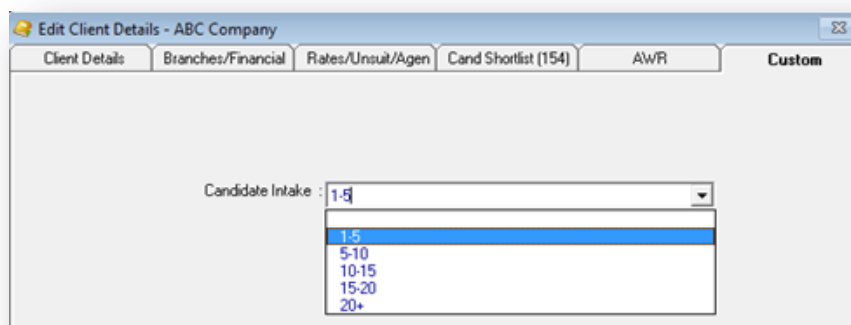
Add the name for your
'Custom Field' here

Client Custom Fields		Candidate Custom Fields	
Name (e.g. No. Emps)	Options (e.g. 1-10;11-50;50+)	Name	Options
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

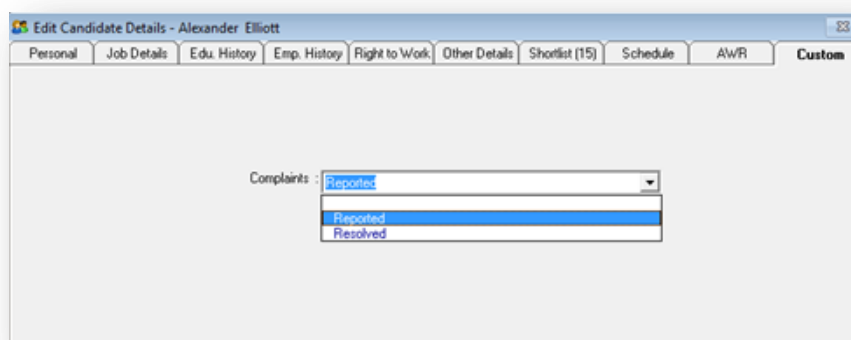
Within the 'Options' section you have a choice of numerical and/or lettering, they can be separated by the addition of a Semicolon (;) this will allow a drop down menu as seen on the example provided.

Client Custom Fields		Candidate Custom Fields		
Name (e.g. No. Emps)	Options (e.g. 1-10;11-50;50+)	Name	Options	
1.	Candidate	1-5;10;10-15;15-20;20+	Complaints	Reported; Resolved
2.				

The 'Options' added to the 'Client Custom Fields' can then be selected from the 'Custom' tab of the client record.



The 'Options' added to the 'Candidate Custom Fields' can then be selected from the 'Custom' tab of the candidate record.



3.14 Client:

The next tab of Eclipse Default Preferences relates to the client record. The 'Client' tab allows you to select default values that populate when adding a client record to Eclipse.

Placing a tick in 'Include in Batch Invoicing' defaults new client records to be included in the batch invoice function.

Placing a tick against 'Automatically populate with ref number' automatically assigns the client reference number to the 'Account Ref' field within the 'Branches/Financial' tab of the client record.

This dropdown menu allows you to select a default preference for the default frequency of invoices

'Type' allows you to select the default invoice preference as either 'Invoice Per Timesheet' or 'Consolidated'. 'Group By' allows you to group the consolidated invoice by selecting one of the options

Entering text in this field will default how the invoice 'For the Attention of' is addressed as a default on client records

Automatically Populate Account Ref No:

Placing a tick against 'Automatically populate account ref with ref number. Automatically assigns the numerical section of the client reference number to the 'Account Ref:' field within the 'Branches/Financial' tab of the client record.

Include In Batch Invoicing:

Placing a tick against 'Include in Batch Invoicing, will automatically tick the 'Include in Batch Invoicing' against any new clients that are added to the system. This can be changed by de selecting the tick box in the 'Branches and financial' tab within the client record. By ticking this box will allow the client to be part of the batch invoice creation.

Type:

Selecting either 'Invoice Per Timesheet' or consolidated invoice will automatically set the default preference for timesheets on any new clients added to the system. This can be changed on individual records if they require different preferences than that of the default setting.

Group By:

By selecting either 'Client Invoice Address' 'Contract Location' 'Timesheet Number' 'Employee' 'Period End' or 'Timesheet PO Number' set the systems default preference for how the consolidated invoices are grouped. This can be changed on the individual client records if required within the 'Branches and financial' tab within the client record.

Invoice Freq:

By selecting either 'Daily' 'Weekly' '2 Weekly' '4 Weekly' 'Monthly' or 'Other' allows the automatic selection of the default invoice frequency for any new client records that are added to the system. This setting can be changed on any individual client records if required within the 'Branches and Financial' tab of the client record.

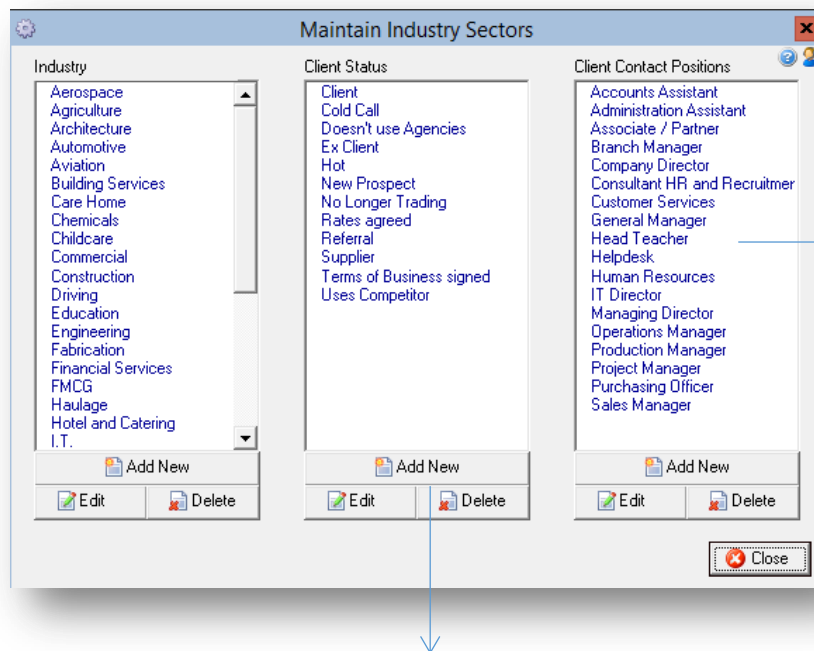
FAO:

Any text added to this field will automatically populate the 'F.A.O' (for the attention of) field of the 'Branches and Financial' tab within the client record. This can be amended on individual records if required you can also select specific client contacts that are added to the records.

4. Client Industry Sector, Status And Contact Position

This section of the 'Maintenance Menu' allows the configuration of three separate searchable fields relating to the client, these are: the industry sector in which clients operate; the status of the client and a list of general job titles of belonging to client contacts. Within each individual client record, values are selected from these pre-defined lists.

The screen shot below displays some common examples:



Client contacts can be categorised by position. These values can be fairly generic

To add a new industry sector, status of contact position, simply select the 'Add New' button at the foot of the relevant column

When adding details of contacts within a client record, they can be categorised by their 'position'. These 'positions' are configured here. They can be fairly generic so that broad groupings can be used. There is an additional field within the client contact record to store the 'actual' job title of the contact if different from one of the standard groups.

To add a new industry, client status or contact position, simply click 'Add New' button under the relevant list. To edit an industry, status or contact position, highlight the one to be amended and select 'Edit'. The description can now be changed. Any changes will automatically update throughout Eclipse.

To delete an industry, status or contact position, highlight it in the list and then select 'Delete'.

Eclipse will not delete a value that is in use by records in the database. The warning box below will be displayed. All related records must be removed before the field can be deleted.

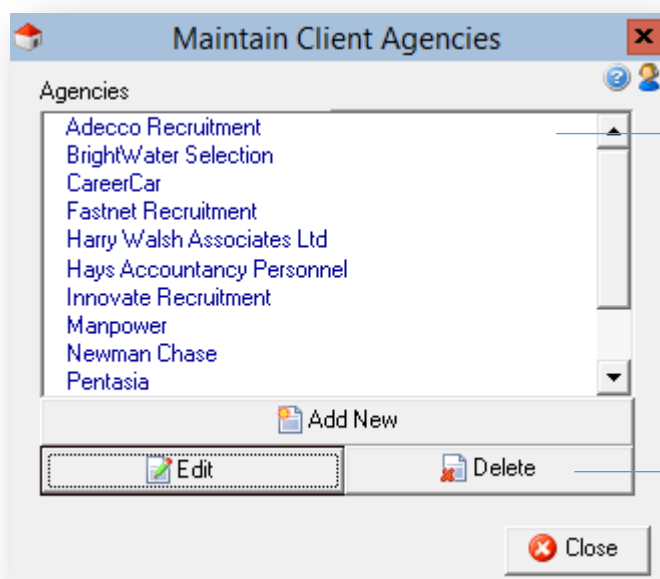


All related records must be removed before an industry sector can be deleted.

5. Client Other Agencies

This screen allows the facility to create a list of competitors or other recruitment agencies used by clients to source candidates. This allows consultants to keep track of which other agencies are being used by clients and new prospects.

Administration of this list is performed in exactly the same way as the previous 'client industry sectors' section within the Eclipse Maintenance Menu.

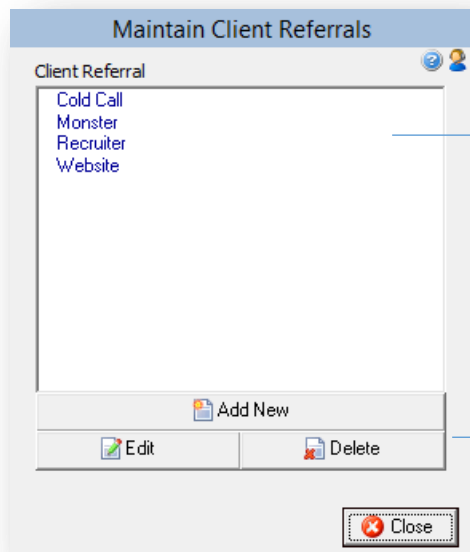


Create a list of competitors or other agencies used by clients to source candidates for vacancies

Administration of this list is performed in exactly the same way as the client industry sectors within the Eclipse Maintenance menu

6. Client Referral

This section of the Maintenance Menu allows the tracking of client traffic through Eclipse. For example, how contact with the client was initially established. Administration of this list can be carried out using the 'Add New', 'Edit' and 'Delete' buttons.



This list allows the tracking of client traffic through Eclipse (eg how contact with the client was established)

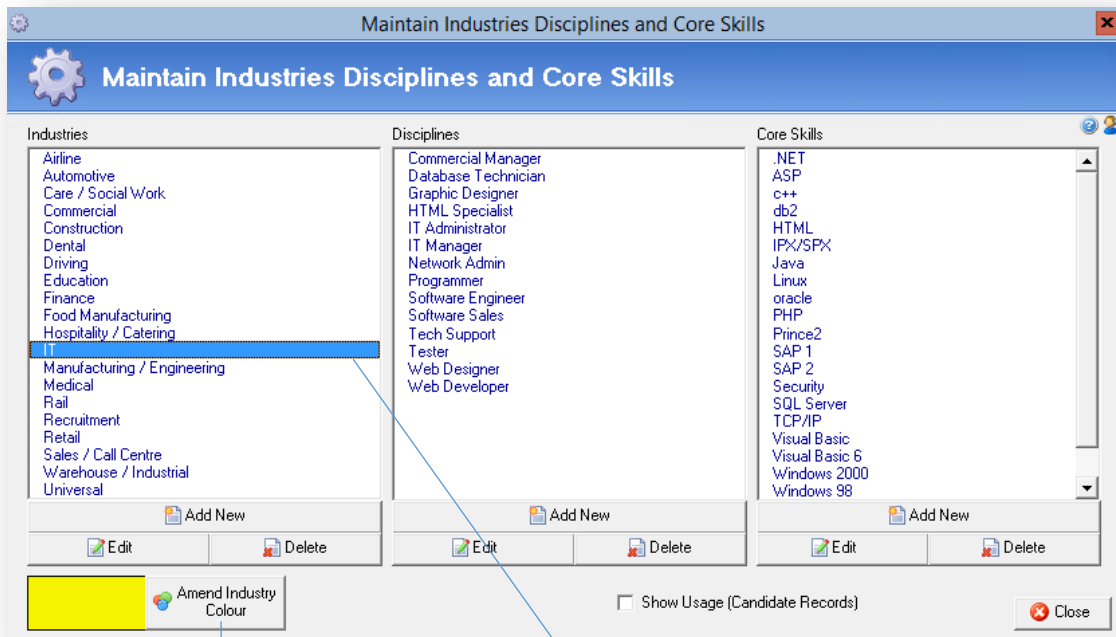
Administration of this list can be carried out using the 'Add New', 'Edit' and 'Delete' buttons.

7. Candidate And Vacancy Industries, Disciplines & Core Skills

This is potentially the most important part of the Eclipse set-up and defines the candidate job title and skill search facility within Eclipse. It is recommended that considerable care be taken during the configuration of this section to ensure maximum effectiveness of the software.

Eclipse uses a classification system based on industries, job disciplines and skills to categorise both candidates and vacancies within the database. This enables effective searching and matching between vacancies and candidates. It is particularly important to set these up correctly as the disciplines and skills will be used as keywords to auto-create candidate records using the 'import CV' facility and so all 'disciplines' should be entered as you would expect to read the 'job titles' on a CV. The same consideration should be used for skills.

As depicted below, each industry can contain related disciplines (job titles) and skills for distinction between various industry specific classifications. For example, all IT specific 'disciplines' and 'core skills' can be contained within an 'IT' industry sector. Additionally, industry sectors may be colour coded to aid easy identification and classification.



Industry sectors can be colour coded for easy identification and classification

Each industry sector can contain related job disciplines and core skills

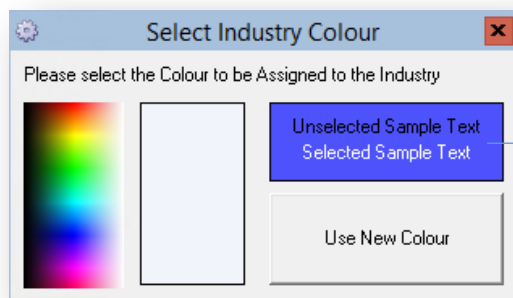
Where the Eclipse WI integration is applicable, an additional 'Update Website' button will be visible at the bottom of the window. Selecting this will automatically synchronise the industries, disciplines & skills with the corresponding fields on the website. Candidates will see the exact same values when registering and searching for jobs.

To add a new industry sector, simply click the 'Add New' button at the foot of the Industries list. The following window will appear. Enter the industry name (and the code where required) The 'Code' field need only be completed when exporting information to Sage via the bolt-on. The new industry sector will now appear in the list:



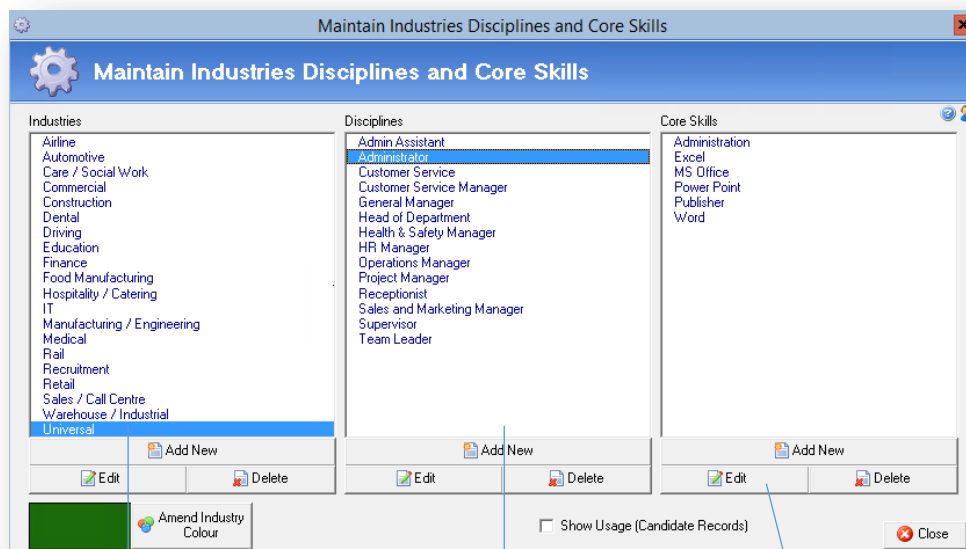
Where required assign the 'Industry' to a 'Division'. This feature ultimately allows the lock down of the system so that users of the system are only able to view and search for candidates, and vacancies who industry relates to the 'Division' of the company they belong to. Finally, select 'Save'.

To colour code the industry sector, first highlight the desired industry in the list then select 'Amend Industry Colour'. The following window will appear. Hover the cursor over the colour pallet and select the desired colour by clicking the mouse. Finally select 'Use New Colour' to confirm the choice.



To choose a colour roll the cursor over the pallet and then left click on the desired colour to confirm

When adding disciplines and skills, there is a default industry classification known as 'Universal' into which non-industry specific job types (disciplines) and skills can be added, for example administrator.



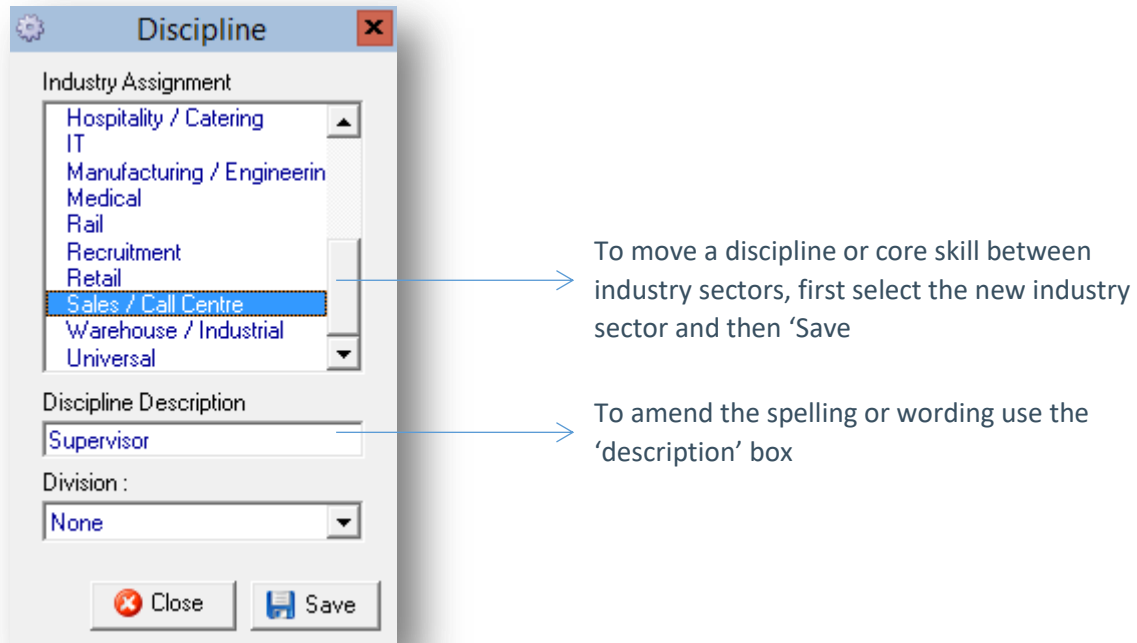
The default industry classification 'Universal' can be used for non-industry specific job titles and core skills

Non industry specific job titles and core skills are those that may apply to multiple industry sectors

To amend a 'discipline' or 'core skill' or move them between industry sectors, select 'Edit'

To add a discipline or a skill, firstly highlight the desired Industry sector. Secondly select 'Add New' from the bottom of the discipline or core skill column. To delete a value highlight then select the corresponding 'Delete' button.

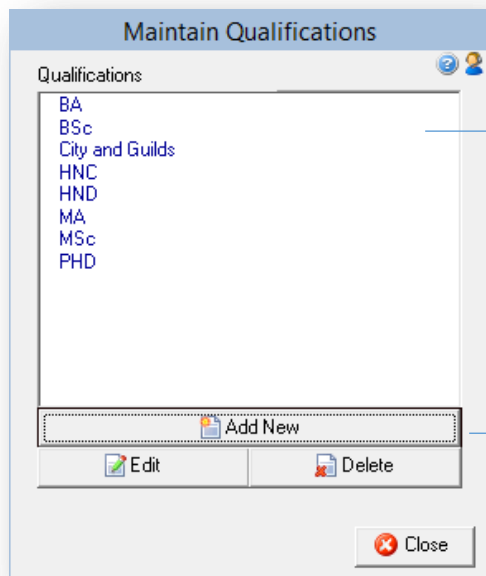
If required, disciplines and core skills can be moved between industry sectors. Select the field to be moved and choose 'Edit'. To change the industry sector, select the required industry sector from the upper list and select 'Save'. Amendments to spellings can also be made in this window.



Additionally, disciplines can be assigned to a division. Where the Eclipse default setting is set to include candidates, vacancies and contracts in divisional searches, when searching for candidates, vacancies and contracts based on division, the results will display both records that are assigned to a particular user of the software and therefore a division, plus those records that have been assigned a discipline which relates to a particular division regardless of the record ownership. Additionally, where user permissions have been locked down to view only records belonging to their division, search results will also include candidates, vacancies and contracts containing disciplines assigned to that division regardless of the divisional ownership of the record.

8. Candidate/Vacancy Qualifications

Qualification attributes are assigned to both vacancies and candidates respectively in much the same way as the industries, disciplines and skills are in order to facilitate accurate matching. The administration of this section is performed using the standard 'Add', 'Edit' and 'Delete' buttons.



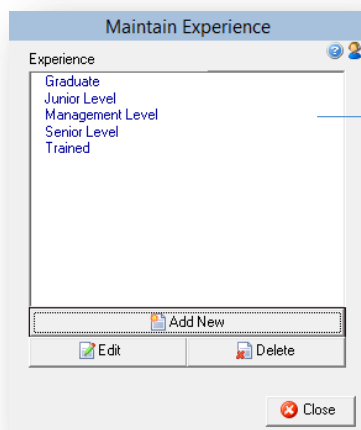
Eclipse will perform a key word search using this list in order to auto-populate candidate records in Eclipse

Administration of this section is performed using the standard 'Add', 'Edit' and 'Delete' buttons

Where the Eclipse WI functionality is enabled, an 'Update Website' button will appear at the foot of this screen and allow the synchronisation of qualification categories in Eclipse with those used for searching and registration on the website. This works in exactly the same way as the upload of industries, disciplines and core skills'.

9. Candidate Experience

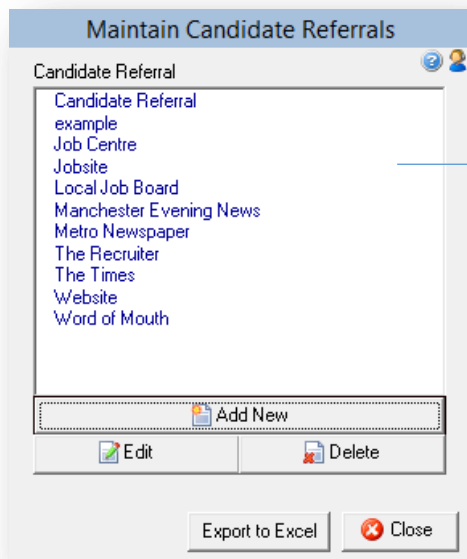
Listing candidate's experience in years will hinder the search functionality as Eclipse will not automatically update as each year passes. Therefore, this section can be used to record alternative searchable values such as the suitability of candidates by assigning them a 'star rating' or recording their level of experience e.g. trainee, junior, graduate, management and senior management. Maintenance of this field is performed in exactly the same way as the other lists using the 'Add', 'Edit' and 'Delete' buttons.



It is not advisable to classify a candidate's experience in 'number of years' as the data will become out of date very quickly

10. Candidate Referral

This section allows the configuration of the candidate referral field. This can be used to track initial contact with candidates e.g. as the result of specific advertising campaigns, job sites, from a website, or via a recommendation etc. Maintenance of this field is performed in exactly the same way as the other lists using the 'Add', 'Edit' and 'Delete' buttons.



This section can be used to track initial contact with candidates e.g. via ad campaigns, websites and recommendations

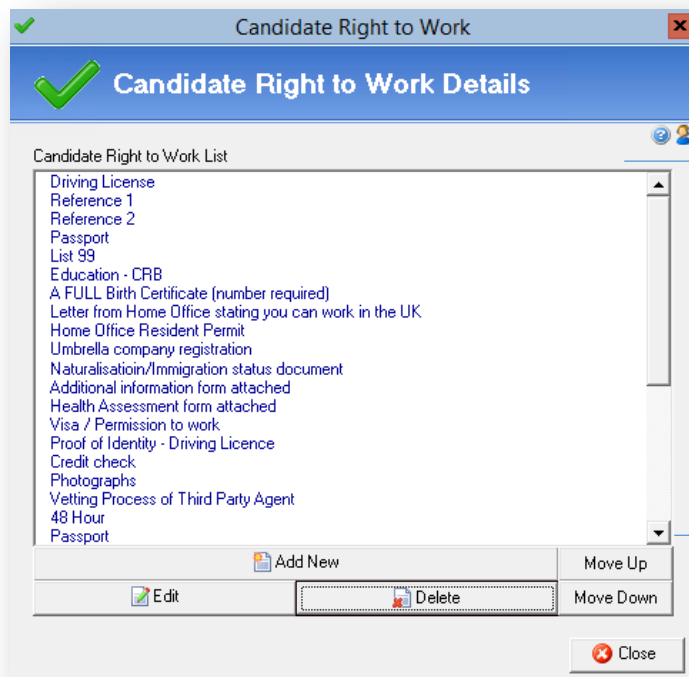
11. Candidate Right To Work

This editable list allows for the configuration of a 'checklist' of documents that are stored within each candidate record. This feature is more commonly used within temporary recruitment and may typically contain values such as 1st reference, 2nd reference, passport etc. Further detail can be stored against these items from within the candidate record for example attachments of scanned documents etc. This screen simply allows the configuration of the list of documents to be included in the checklist.

Maintenance of this field is performed in exactly the same way as the other lists using the 'Add', 'Edit' and 'Delete' buttons.

There is the addition of two extra administrative buttons on the right of the screen: 'Move Up' and 'Move Down'. These allow the order of the documents to be modified rather than displaying them

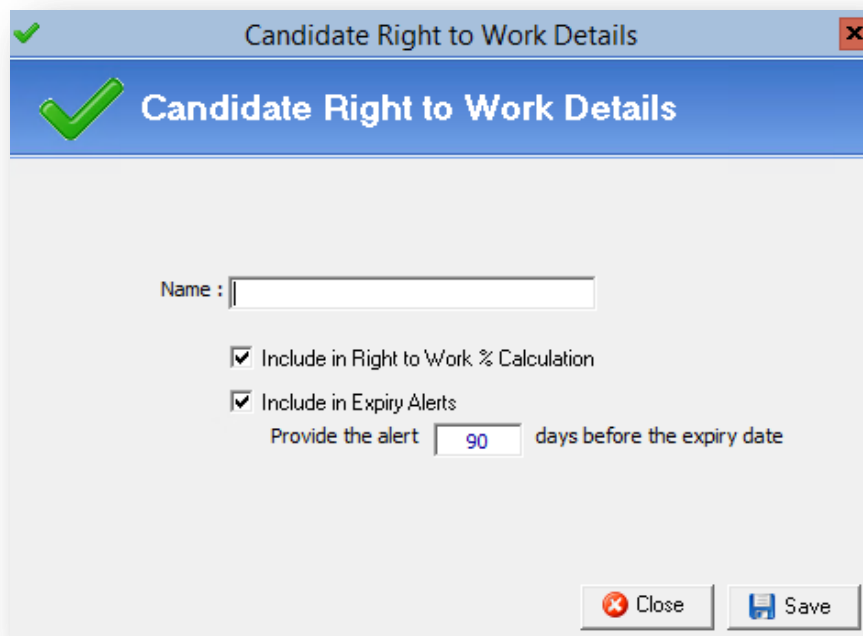
alphabetically. This enables the use of this checklist as a key part of the registration process.



This section can be used as a check list of documents as part of the candidate registration process

Documents can be listed in order of priority using the 'Move Up' and 'Move Down' buttons

Select 'Add New' to enter details of a new right to work document:



Name:

This field is for the name of the document as it will appear in the candidate record.

Include In Right To Work % Calculation (Tick Box):

Where required, Eclipse will provide notification of documents due to expire. Use this tick box to indicate whether a warning is required for each individual document.

Include In Expiry Alerts (Tick Box):

Where required, Eclipse will provide notification of documents due to expire. Use this tick box to indicate whether a warning is required for each individual document.

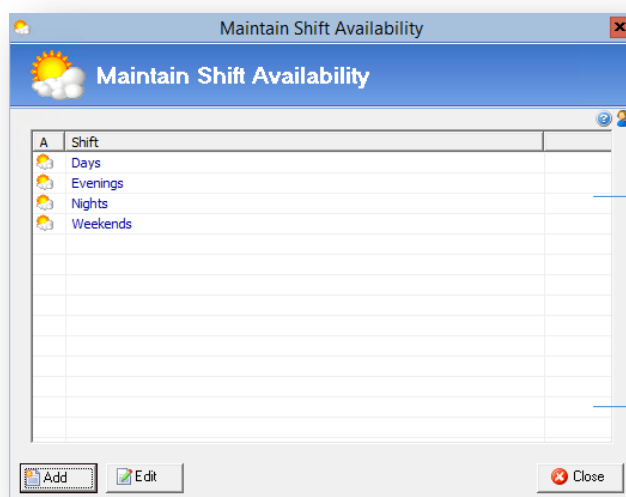
Provide The Alert [90] Days Before The Expiry Date:

Where the box 'include in expiry alerts' has been ticked, it is possible to specify how far in advance of the document's expiry date the warning is required.

12. Candidate Shift Availability

This section allows the configuration of a basic list of shift types for example, days, nights, evenings or weekends etc. This can be as specific as required e.g. 8am – 8pm etc. Within each candidate record it is then possible to select the types of shifts or working hours the candidate would prefer.

This section also works in conjunction with the candidate schedule and the enhanced matching and availability feature. The first step is to configure a list of shift types that the candidate may be available / unavailable for:



This section allows the configuration of a basic list of shift types e.g. Days, nights etc.

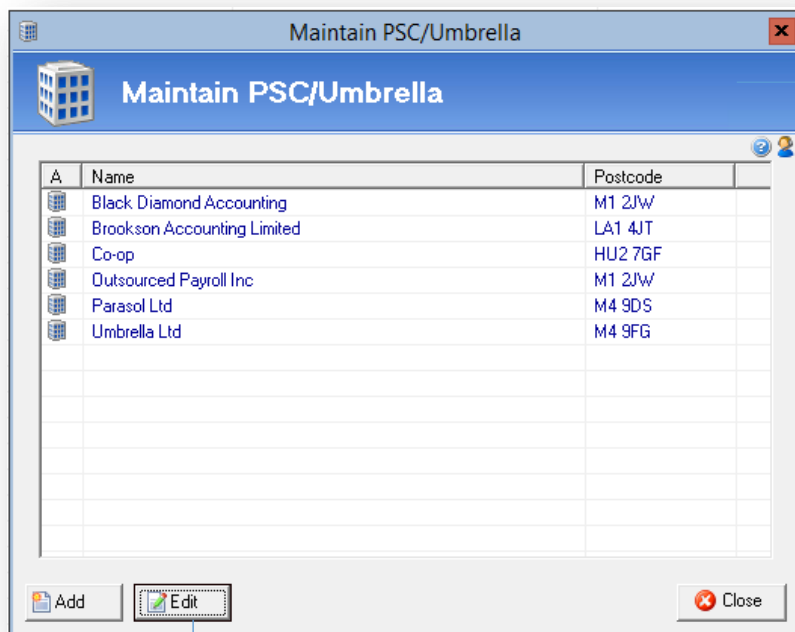
This can be as specific as required by entering actual shift hours where appropriate

Maintenance of this field is performed in exactly the same way as the other lists using the 'Add' and 'Edit' buttons. To remove a value from this list, first double click to open the entry and then select the 'Delete' button.

13. Candidate PSC/Umbrella

This section need only be considered where temps or contractors are paid through a PSC (Personal Services Company) or umbrella company. Details of each PSC or Umbrella company can only be configured via the Maintenance menu. On an individual candidate basis, where the temp or contractor is paid via a PSC or Umbrella, the appropriate details can be selected from a drop down menu. This prevents the need for repetitive entry of the same PSC or Umbrella details.


This feature also enables Eclipse to group candidates by PSC or Umbrella for searching and reporting on timesheets. Additionally, where a payroll export bolt-on is activated, candidate payments can be grouped for export.



This section needs only be considered where temps or contractors are paid through a 'PSC' or 'Umbrella' company.

Maintenance of this section is performed in much the same way as the other sections of the Eclipse maintenance menu.

Adding and editing of this section works in the same way as with the other Maintenance Menu options. Clicking the 'Add' or 'Edit' buttons open the 'PSC / Umbrella Details' screen as shown below.

PSC/Umbrella Details	
<div> <div>  <div> <div>PSC/Umbrella Details</div> </div> </div> </div>	
<div> <div>Company Details</div> <div> <div> <div>Company Name:</div> <div>Parasol Ltd</div> </div> <div> <div>Address:</div> <div>2 Main Street</div> <div>Manchester</div> </div> <div> <div>Postcode:</div> <div>M4 9DS</div> </div> <div> <div><input checked="" type="checkbox"/> VAT Registered</div> </div> <div> <div>Tax Code:</div> <div>01 : Standard rated transactions (20%)</div> </div> <div> <div>VAT No.:</div> <div>8912489489</div> </div> <div> <div><input checked="" type="checkbox"/> Limited Company</div> </div> <div> <div>Company Reg No.:</div> <div>02930290-20</div> </div> <div> <div>Date of Incorp.:</div> <div>23/07/06</div> </div> <div> <div><input checked="" type="checkbox"/> Copy of Certificate of Incorporation</div> </div> </div> </div>	
<div> <div>Details of Bank or Building Society</div> <div> <div> <div>Name of Bank:</div> <div>Lloyds</div> </div> <div> <div>Address:</div> <div>1 Lloyd Street</div> <div>Manchester</div> </div> <div> <div>Postcode:</div> <div>M6 8RD</div> </div> <div> <div>Name:</div> <div>parasol</div> </div> <div> <div>Sort Code:</div> <div>123456</div> <div>Acc. No.:</div> <div>12345678</div> </div> <div> <div>Payment Ref.:</div> <div>eclipse</div> </div> <div> <div>Supplier Ref.:</div> <div>parasol</div> </div> <div> <div>IBAN:</div> <div>74883439</div> </div> <div> <div>Swift Code:</div> <div>89189239</div> </div> <div> <div>Roll No.:</div> <div>82398320</div> </div> </div> </div>	
<div> <div> <div>Delete</div> <div>Close</div> <div>Save</div> </div> </div>	

The details entered within this screen will be copied through to candidate records when linked them to particular PSC or Umbrella companies.

The details entered within this screen are then automatically copied through to candidate records when linking them to a particular PSC or Umbrella company. This ensures that all information is accurate for all candidates paid in this manner.

14. Candidate 2nd Tier Agency

This section need only be considered where 2nd tier agencies are employed to source candidates via a master vendor agreement. Configuration of this section is performed in exactly the same as the PSC / Umbrella section above. On an individual candidate basis, where the temp or contractor has originated via a 2nd tier agency, the details of that agency can be selected from a drop down menu. As above, this prevents the need for repetitive entry of agency details.

Maintain 2nd Tier Agencies

Maintain 2nd Tier Agencies

A	Name	Postcode
	Burton Royce Recruitment	N1 4RD
	Halo Recruitment	M1 3HR
	Panasonic Recruitment	M3 4YY
	R2R Services Limited	M1 3HH

Add

Edit

Close

The section need only be considered where candidates are sources via a 2nd tier agency

Adding and editing of this section works in the same way as with the other Maintenance Menu options.

The details entered within this screen will be copied through to candidate records when linking them to a particular 2nd Tier Agency

The details entered within this screen are automatically copied through to candidate records when linking them to a particular 2nd tier agency. This ensures that all information is accurate.

15. Candidate Reason For Unavailability

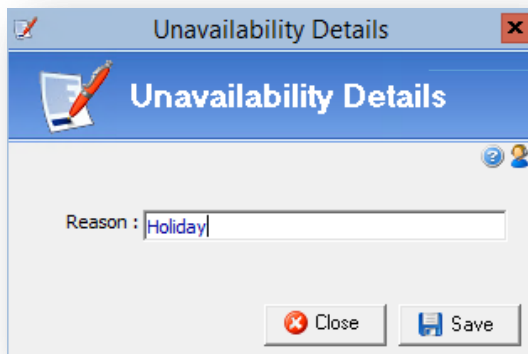
This section works in conjunction with the candidate schedule and the enhanced matching and availability feature. The first step is to configure a list of reasons why a candidate may be unavailable for a day or a shift.

Initially this menu is blank and needs to be populated.

The section works in conjunction with the candidate schedule and the enhanced matching and availability feature

Maintenance of this field is performed in exactly the same way as the other lists using the 'Add' and 'Edit' buttons. To remove a value from this list, first double click to open the entry and then select the 'Delete' button.

Select 'Add' to create an entry. The following window appears:



Configure a list of reasons why a candidate may be unavailable for a day or a shift

16. Vacancy Status

This editable field allows the definition of a vacancies status over and above the Eclipse default values. The four default values: unfilled 'filled, partially filled and withdrawn cannot be removed or edited.

There is a degree of automation as Eclipse will update the status of a vacancy accordingly when a permanent vacancy is filled or a contract is populated with a candidate etc. It is for this reason that they are required and cannot be renamed or removed. However, it is possible to create additional groups with 'alias' names for each of the default four. These may be required in situations where classification of vacancies falls outside of the default values whether it's for searching or analysis or simply because alternative terminology such as live or placed is preferred. The four default values for vacancy status are:

Unfilled:

New vacancies added to the system are automatically listed as 'Unfilled'. This indicates that a suitable candidate has yet to be found.

Filled:

This indicates that the vacancy has been filled and there is no further requirement.

Partially Filled:

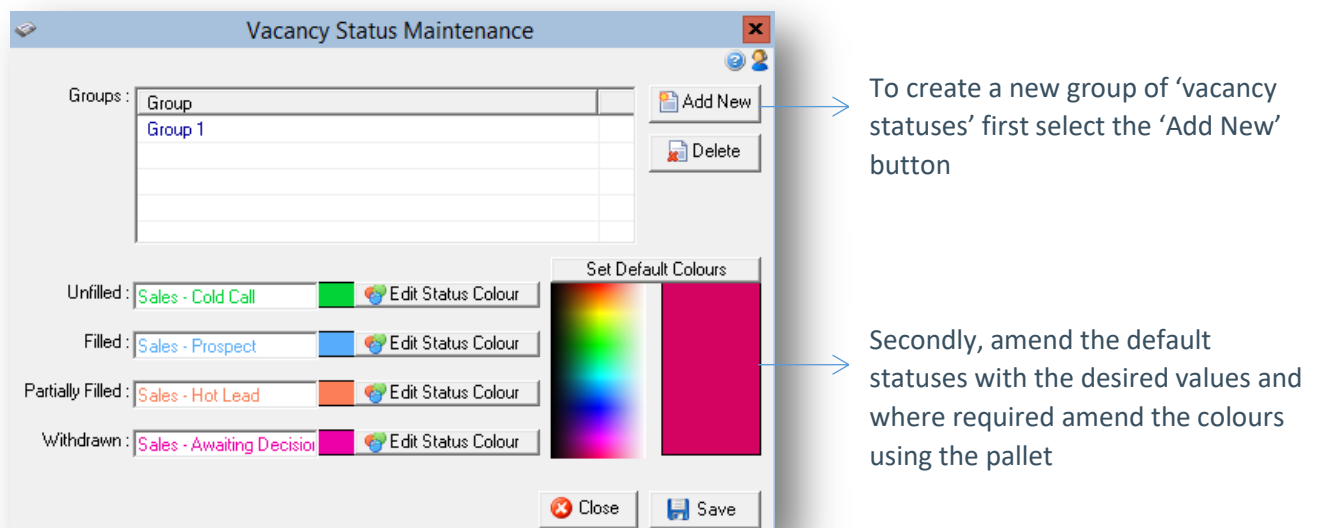
This applies to temporary contracts only. There are two instances in which the vacancy may be

partially filled. Firstly, where there are multiple requirements (contracts) for the same vacancy and one or more of the contracts remain unassigned. Secondly, where a candidate has been assigned to an associated temp contract but there are still some remaining requirement days that need to be filled.

Withdrawn:

Withdrawn indicates that the vacancy has been removed by the client or has been filled elsewhere therefore there is no further requirement.

To create additional status groups, first select 'Add New'. In the example below, 'Add New' has been selected and 'Group 1' has been created. Replace the four default statuses with the desired values.

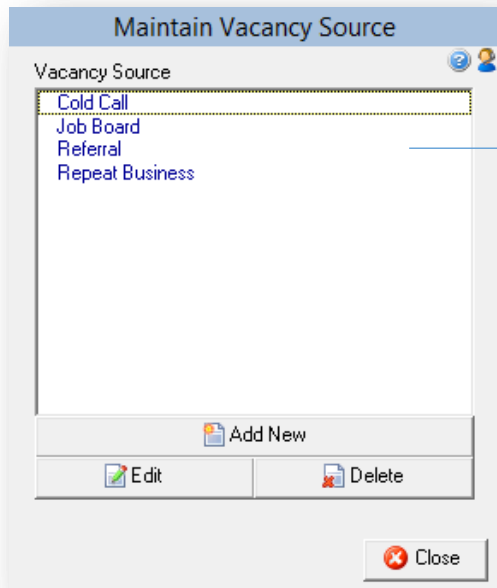


Depending on their status, vacancies are displayed in different colours in the main interface. Colours cannot be changed for the default values. However, where additional groups are created, it is possible to choose alternative colours. To amend the colour, first select 'Edit Status Colour' button next to the required status. Secondly use the pallet on the right to choose the desired colour. Click the mouse to confirm. This allows for easy distinction between vacancy statuses in the main interface.

17. Vacancy Source

The vacancy source feature can be used to classify the origin of vacancies in the database. These values can then be used for analysis, e.g. tracking advertisements, cold calls etc.

Each vacancy in the database can be assigned an entry from this list. As with the other categories in the Maintenance Menu, administration of this section is performed using the 'Add New', 'Edit' and 'Delete' buttons at the foot of the list.

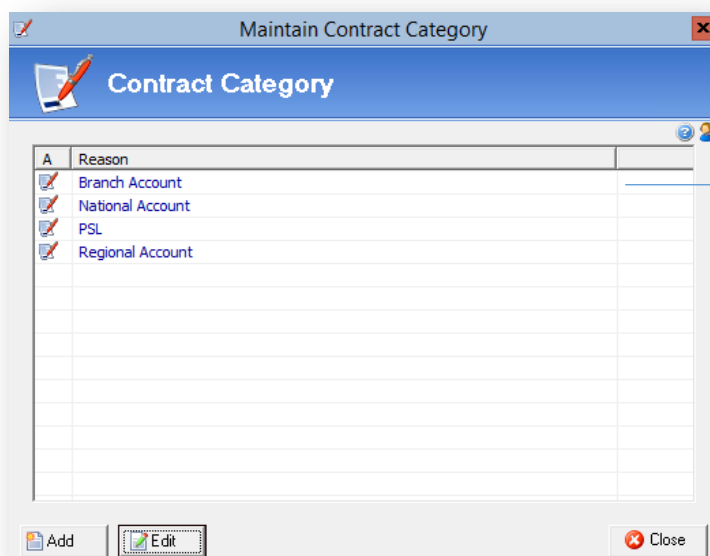


This section can be used to classify the origin or vacancies within the database

18. Contract Category

This section allows the creation of contract categories that can be used to 'ring fence' temp contracts of certain types e.g. temp contracts originating as the result of master vendor or PSL agreements. Alternatively temp contracts could be ring-fenced based on the nature of the work e.g. industrial or commercial etc. When creating new temp contracts or editing existing temp contracts the category can be selected from the foot of the rates and shifts screen

As with the other categories within the Maintenance Menu, administration of this section is performed using the 'Add New', 'Edit' and 'Delete' buttons at the foot of the list.



This section of the maintenance menu allows the creation of contract categories that can be used to 'ring fence' temp contracts of certain types

19. Contract Reason For Termination

This section of the maintenance section comes complete with seven default values. These are: contract changed, dismissed, ill health, moved away, new job, no further requirement and personal problems. In the event that a temp contract is terminated a value from this list can be sighted as the reason for termination. In addition to the default values, further reasons can be added. In the example below, 'site closure' had been added.

As with the other categories within the Maintenance menu, administration of this section is performed using the 'Add' and 'Edit' buttons at the foot of the list. To delete a value, first double click to open the field and then select 'delete'.

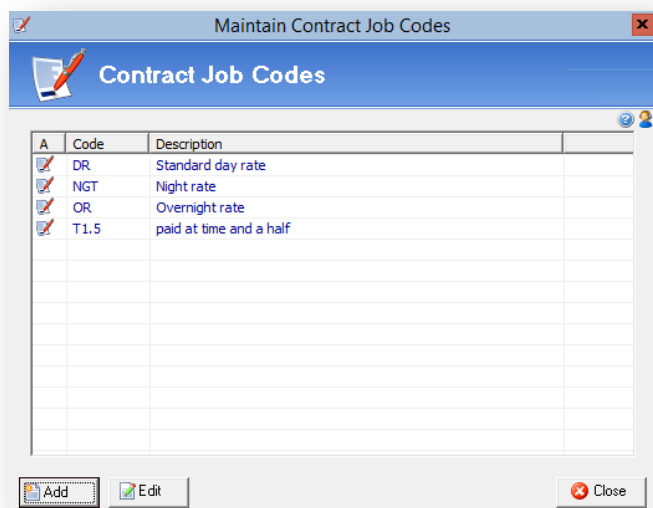


This section of the maintenance menu comes with 7 default values which can be sighted as the reason for a contract termination

20. Contract Job Codes

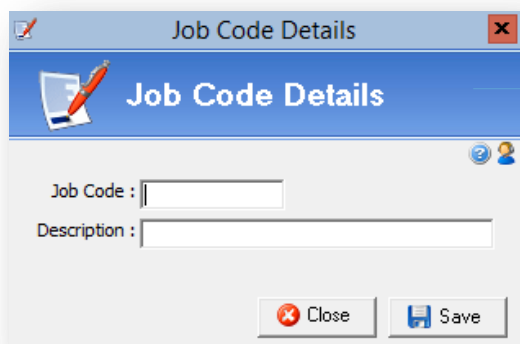
This section of the Maintenance menu need only be complete where the Tempaid Export bolt-on is activated. In all other instances, this section may be ignored.

In order to import timesheet information from Eclipse into Tempaid, each pay element within a temp contract in Eclipse must be assigned a job code to correspond with those configured within Tempaid itself. The job codes are configured here:



→ A list of codes and descriptions set up in Tempaid must also be configured in Eclipse

To add a new job code simply select the 'Add' button at the bottom of the screen. The following window will appear. Add the job code and description then select 'Save'.



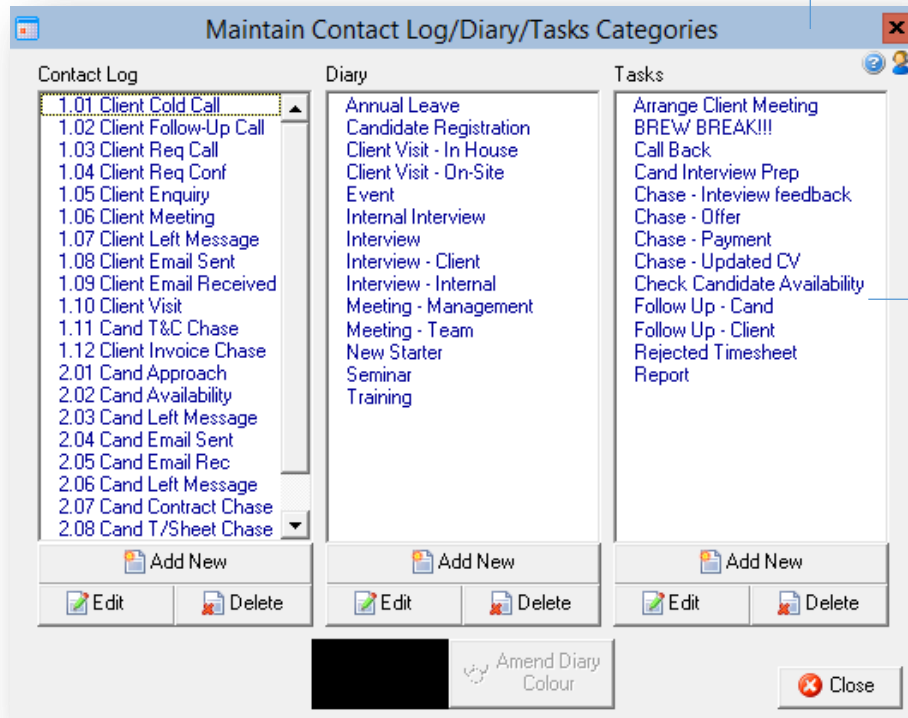
→ Once configured, each pay element within a temp contract in Eclipse must be assigned a job code

Once configured, each pay element within a temp contract in Eclipse must be assigned a job code. If not, the details can be exported without errors from Eclipse but not imported into Tempaid.

21. Contact Log/Diary/Tasks

This section explains the categorisation of contact log entries, diary entries and tasks within Eclipse. As with all previous maintainable categories, use the 'Add New', 'Edit' and 'Delete' buttons at the foot of each list to manage these lists.

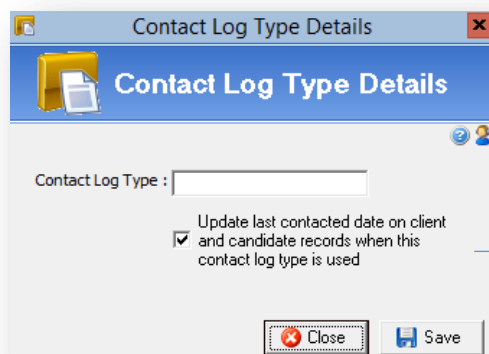
The contact log can be used to record contact with, or actions relating to, clients, candidates and vacancies.



Tasks can be created off the back of contact log entries. Each task must be assigned a 'type' which are configured in this window.

Contact Log:

This feature records contact with, or actions relating to, clients, candidates and vacancies in the database. Such contact can be categorised by different 'types' and are configured here. The analysis feature within Eclipse allows for reporting on contact log entry types and is therefore also useful for monitoring consultant's key performance indicators (KPI's). Examples of contact log 'types' could include: cold call, follow up call, phone call made, phone call received etc. To add a new contact log entry, select 'Add New' from the foot of the contact log column:



Select this option to update the last contacted date when this contact log type is used

Firstly enter the name of the contact log type. Secondly, select the check box where required. Selecting this option will update the last contacted date within client and candidate records when this contact log type is used.

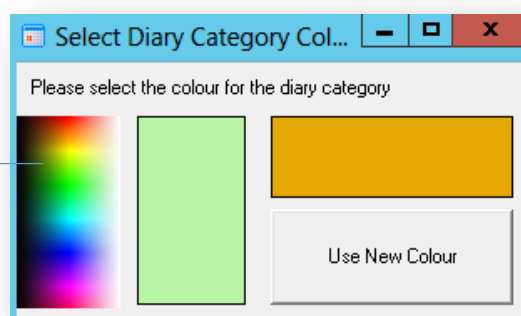
Tasks:

Additionally, when adding a contact log note in Eclipse, there is the option to create a related task and reminder. Therefore Eclipse can be used as a time management tool, reminding when to make calls, when to chase candidates etc. These tasks are categorised by the values entered in the right hand column on the above screenshot.

Diary:

Similarly the diary can be categorised in the same manner. There is an additional option of selecting a colour for the diary type. All entries are then displayed in colour for visual effect. To amend the colour, select 'Amend Diary Colour' beneath the diary column. The following window will appear. Hover the cursor over the pallet to obtain the desired colour. Left click to confirm.

Hover the cursor over the pallet to obtain the desired colour. Left click to confirm



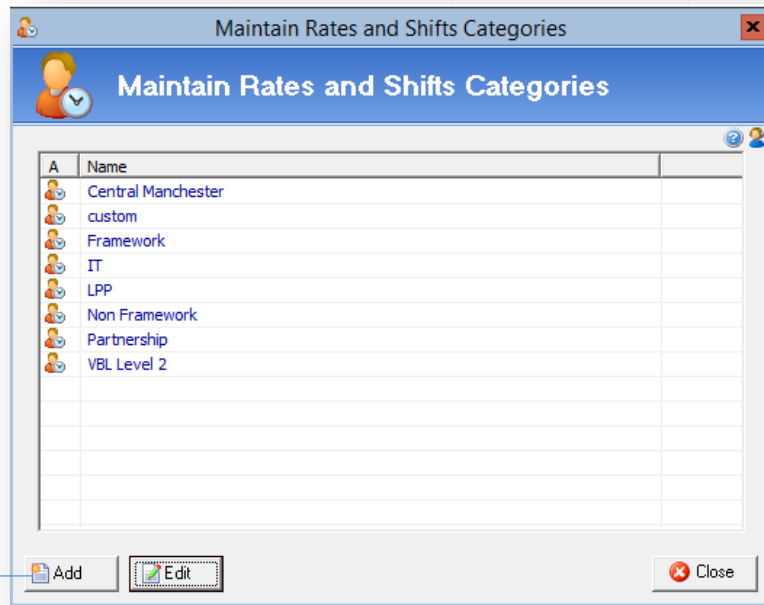
Be careful to choose fairly light colours within the pallet as the dairy type and subject text will appear on top of the colour in the diary. Where colours are too dark the text will not be clear.

22. Rate & Shifts Category

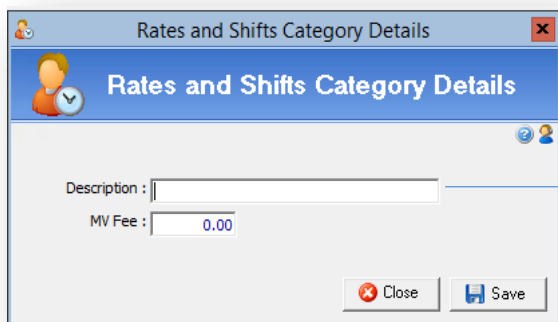
The rates and shifts category section allows a customisable list to be created and assigned to rates and shifts presets. Each client can then be assigned to a category (in the Branches / Financial tab of each individual client record) and when picking a rate and shift present from the contract forms it will filter the presets according to the category selected.

As with other sections of the Maintenance Menu, this section is initially blank when purchasing Eclipse. The example below shows the categories that have already been configured.

To add a new category to the list select 'Add'. To remove an existing category, first double click to open where a 'Delete' button will be available.



To add a new category select the 'Add' button, the following screen is displayed:



Enter the category description then select 'Save'

Enter the category description and then select 'Save'. In order to remove a category, open an existing category where a 'Delete' button will be available. The 'Client Rate Category' is searchable from both the client search form and also the contract search form.

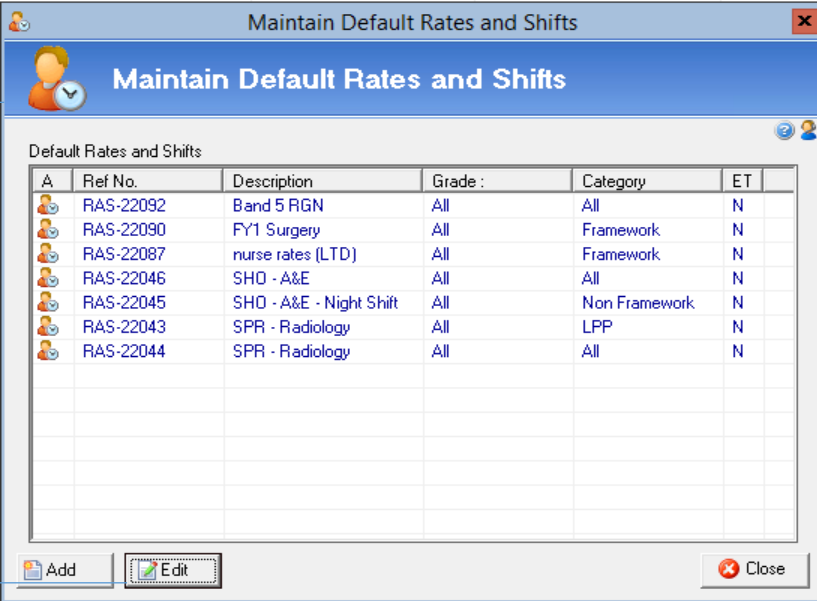
23. Default Rates & Shifts

System wide rate and shift templates can be used to create temp contract bookings for any client in the database where certain information will be pre-populated. These are known as default rates and shifts. The same feature is available for setting rate and shift templates where agreements are in place for individual clients. This is performed within the individual client record rather than the

Maintenance menu. In addition to using rate and shift templates, rates and shifts can be created on a 'per' booking / ad hoc basis at the point of creating a temp contract in Eclipse.

As with other sections of the Maintenance menu, this section is initially blank when purchasing Eclipse. The example below shows templates that have already been configured and clearly shows the template 'Description', the 'Industry' that the template relates to, the 'Rates and Shifts Category' and whether or not the rates are equal treatment comparable (ET) in relation to AWR.

All existing rate and shift templates are listed here. ←



Select 'Edit' to amend an existing template or 'Add' to create a new one. ←

A	Ref No.	Description	Grade :	Category	ET
	RAS-22092	Band 5 RGN	All	All	N
	RAS-22090	FY1 Surgery	All	Framework	N
	RAS-22087	nurse rates (LTD)	All	Framework	N
	RAS-22046	SHO - A&E	All	All	N
	RAS-22045	SHO - A&E - Night Shift	All	Non Framework	N
	RAS-22043	SPR - Radiology	All	LPP	N
	RAS-22044	SPR - Radiology	All	All	N

To create a default rate and shift template, select the 'Add' button from the foot of the screen. The following 'Client Rates and Shifts' screen will appear.

To aid explanation, the screen has been broken into three sections as follows:

- Section One: Information known
- Section Two: Rates
- Section Three: Shift pattern

Section One:
Information Known

Section Two: Rates

Section Three: Shift
Pattern

Section One: Information Known

The top section of this screen allows for some specific information about the template:

Ref No:

When the rates and shift template is saved it will be allocated a reference number beginning with 'RAS'. Until it is saved the reference number appears as 'RAS-NEW'.

Date Registered:

This captures the time and date of template creation. This cannot be amended or deleted.

Description:

The description of the rates and shift template can be either the specific job title or something more general e.g. 'minimum wage / basic shift'. The example above shows a minimum wage calculation.

Notes:

This is a free notes box which can be used to highlight any additional information about the rate and shift template. Any notes entered here will be copied through to any subsequent contract and timesheet records.

Exp Notes:

This is a free notes box which can be used to highlight any expenses information. Any notes entered here will be copied through to any subsequent contract and timesheet records.

Timesheet:

The two fields in this section indicate the timesheet frequency and the last working day of the working week. These values can be set in the Eclipse Default Preferences section of the Maintenance menu.

The following three fields indicate how the rates are calculated and based on what values:

Rate Known:

From this drop down, specify which values are 'known' when negotiating fees. The four options are as follows:

- The pay rate is known
- The charge rate is known
- The invoice rate is known
- The pay rate and invoice rate are known

For the purpose of Eclipse, the definitions of 'pay rate', 'charge rate' and 'invoice rate' are as follows:

- Pay rate: The gross pay the candidate will receive per unit of work (e.g. hourly/daily)
- Charge rate: The cost to the agency (pay rate + WTD + Employers NI)
- Invoice rate: The cost to the client

Work To:

From this drop down, specify whether fees are calculated based on mark-up or margin:

- Work to an hourly mark-up: A fixed value in £'s per hour/day
- Work to an hourly margin: A percentage calculated on a choice of values

Margin On:

If rates are calculated based on a percentage margin, specify what the margin is calculated as a percentage of:

- Pay rate only
- Pay rate and WTD
- Charge rate
- Invoice rate

Holiday Pay:

To include holiday pay in the rate calculations, tick this box. The default value set in 'Eclipse Default Preferences' will automatically appear in the box to the right.

Employers NI:

Similarly to holiday pay, to include employers National Insurance contributions in the calculation, this box should be ticked and the percentage entered at 12.8%. This value is also set via the 'Eclipse Default Preferences' section of the Maintenance Menu.

Please note this calculation does not take into consideration the 'free pay' element where National Insurance is not applicable to the first portion of an employees' wage. The reason being that this allowance may have already been applied to a candidate's wage paid elsewhere and is therefore not applicable.

Enter All Figures Manually:

Ticking this box allows the user to manually enter all the figures in 'section two' when calculating rates.

Section Two: Rates

In this section, up to ten pay rates calculations can be entered e.g. standard rate, overtime rate, day rate, night rate etc. By entering the known values as outlined above, Eclipse will automatically calculate the remaining fields in the grid.

In this section up to ten pay rate calculations can be made.

The following section explains each of the nine columns in the rates calculation box:

Name:

On the left of the grid each row is labelled E.g. Standard, OT1, OT2 to indicate the various pay rates associated with the template. The same labels appear in the first column of the grid itself. These labels can be changed as required E.g. Day Rate, Night Rate and Overtime Rate. It is possible to set up to 10 pay rates per contract.

Pay:

The 'Pay' column indicates the amount the candidate will receive per unit of work. The unit can be either hourly, daily or by shift.

WTD:

The amount of 'Working Time Directive', otherwise known as holiday pay, is automatically calculated assuming the 'Holiday Pay' box is ticked and the percentage indicated in the section above. The holiday pay is only calculated for those rates where the 'HP' box is ticked. (See 'HP' description below)

Employers National Insurance:

This is the value of 'Employers National Insurance' contribution payable assuming the box is ticked in the section above and the percentage value indicated.

Charge:

The 'Charge' is the cost of the booking to the agency per unit worked.

For example, for PAYE candidates: $\text{Charge} = \text{Pay} + \text{WTD} + \text{Employers National Insurance}$

Margin %:

The 'Margin' is the % profit earned. As indicated above, the margin can be calculated on several values: the pay rate only, the pay rate + WTD, the charge rate or the invoice rate. The mark-up value will alter dependent upon what the margin % is calculated on.

Mark-Up:

The 'Mark-Up' is the profit per unit of pay to the agency after deductions.

Invoice:

The 'invoice' rate is the amount invoiced or charged to the client.

HP:

This tick box includes or excludes 'holiday pay' in the individual rate calculations. Please note that holiday pay is not usually included in overtime payments. Holiday Pay is also known As WTR

(Working time Regulation) or WTD (Working Time Directive) and is labelled as WTD in the rates section.

Section Three: Shift Pattern

The final section sets the shift pattern for the template. Specify which days of the week a candidate may be required to work and at what pay rate. If the hours of work are known, these should be specified.

The screenshot shows the 'Client Rates and Shifts' window. The 'Ref No' is RAS-10241 and the 'Date Registered' is 14/09/2011 11:24:45. The 'Description' is Admin Assistant. The 'Timesheet' is set to Weekly and Sunday. The 'Rate Known' is 'The pay rate and invoice rate is known'. The 'Work To' is 'Work to a hourly markup' and the 'Margin On' is 'Charge rate'. The 'Holiday Pay' is 12.07%, 'Employers NI' is 13.80%, and 'MV Fee' is 0.00%. The 'Enter All Figures Manually' checkbox is unchecked. The table below shows the rates and shifts for Standard, OT1, OT2, and OT3. The grid below the table shows the days of the week and the selected rate and shift pattern. The 'Save' button is highlighted with an arrow.

Name	Pay	WTD	Emp NI	Charge	Margin	Markup	Invoice	Inv+MV	HP
Standard	7.00	0.84	1.08	8.93	23.21	2.07	11.00	11.00	<input checked="" type="checkbox"/>
OT1: Bank Holiday	10.00	1.21	1.55	12.75	25.46	3.25	16.00	16.00	<input checked="" type="checkbox"/>
OT2: Overtime	10.00	0.00	1.38	11.38	23.02	2.62	14.00	14.00	<input type="checkbox"/>
OT3:	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>

Day	Rate	Start	End	Paid Units
<input checked="" type="checkbox"/> Monday	Standard	09:00	17:30	7.50
<input checked="" type="checkbox"/> Tuesday	Standard	09:00	17:30	7.50
<input checked="" type="checkbox"/> Wednesday	Standard	09:00	17:30	7.50
<input checked="" type="checkbox"/> Thursday	Standard	09:00	17:30	7.50
<input checked="" type="checkbox"/> Friday	Standard	09:00	17:30	7.50
<input type="checkbox"/> Saturday	Standard	00:00	00:00	0.00
<input type="checkbox"/> Sunday	Standard	00:00	00:00	0.00
<input checked="" type="checkbox"/> Bank Holidays	OT1	09:00	17:30	7.50

Industry: --All-- ☐ Include Holiday Pay with Candidate Payment
 Category: --All-- ☐ AWR Equal Treatment Comparator
 Last Update: 15/09/2014 16:59:06
 By: Alex Elliott

Buttons: Delete, Close, Save

Section Three: Shift Pattern

On completion of the template select 'Save'.

To indicate that a particular day of the week may appear in the shift pattern, tick the corresponding box on the far left of the grid. These are not to be confused with the 'actual' requirement days, rather the 'typical' shift pattern

Select the desired pay rate from the drop down menu. Be aware that Eclipse automatically defaults to the 'Standard' pay rate unless otherwise specified. There is the option to create a 'Custom' pay rate within this section which allows the input of multiple rates on the same day e.g. 'Standard' rate for the first 4 hours and then OT1 thereafter. Selecting the 'Custom' option displays the following window:

In this example 'Standard' rate of pay will be paid up to 8 hours. Between 8 and 10 hours the 'OT1' rate will be paid. Anything over 10 hours will be paid at 'OT2' rate.

In the example above 'Standard' rate of pay will be paid up to 8 hours. Between 8 and 10 hours the 'OT1' rate will be paid. Anything over 10 hours will be paid at 'OT2' rate. In terms of related timesheets, Eclipse will populate the 'OT' fields accordingly.

Back in the main screen, if known, enter the typical start and end times of the shift. It is not necessary to specify these values however this will have an effect on the availability of any candidates assigned to a temp contract using this particular template.

Finally, enter the number of paid units per day. If the rates in section two were calculated on an hourly basis, the number of paid units will be the number of hours to be worked per day. If the pay rate calculated above was a daily rate, the number of paid units will be '1'.

If the pay rate and shift pattern is consistent throughout the week, there is no need to repeatedly enter the details, simply click the [+] on the right of the first line and the details will be copied down the grid to the other days selected by a [Tick] on the left.

Include Holiday Pay With Candidate Payment:

Selecting this option indicates that the candidate's holiday pay will be calculated within their pay rate and not in addition to their pay rate. If this is the case, ensure to un-tick the holiday pay box on the right of the pay rate line so the WTD value appears as £0

AWR Equal Treatment Comparator (tick box):

Setting 'Equal Treatment' rate templates in Eclipse is one of the most important aspects of managing AWR compliance. These templates are used as 'Equal Treatment' safe comparator rates when setting up Equal Treatment Contracts and can be used when creating a Contract. If a tick is placed in the 'AWR Equal Treatment Comparator' box, then this will copy through to the Contract, allowing uninterrupted processing of timesheets and negating the need to split a Contract when equal treatment is reached.

Category:

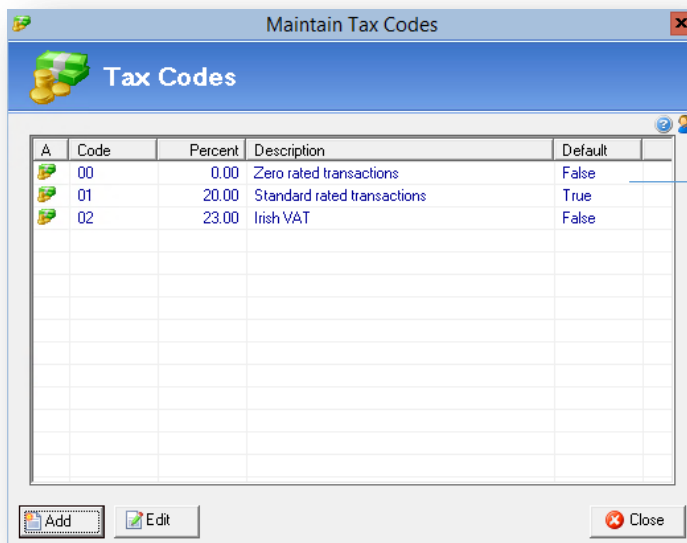
Choose the rate and shift category from the list. In this example the 'IT' category has been chosen. Going forward, where client records have been placed into the 'IT' category, only rate and shift pre-sets relating to 'IT' will be displayed in the contract forms when choosing pre-set rates and shifts templates

On completion of the template, select 'Save'. The template will now be available to use in conjunction with any client in the Eclipse database.

24. Tax Codes

The 'Tax Codes' section allows for the assignment of VAT (value added tax) percentage rates for invoicing purposes.

In this section a system default tax code can be set. However each individual client in the database can have their own default tax code defined assuming it is configured here. This is useful where certain clients are not charged VAT on invoices dependant on sector. As always, manage the list using the 'Add' and 'Edit' buttons at the foot of the window.



The main list displays each tax code currently set in the system. Any one of these codes can be set as the system default tax code or individual client default tax code

Double clicking on a tax code entry will present the 'Tax Code Details' form below:

Enter the 'Tax Code', 'Percentage' and 'Description'

To assign a tax code as the 'default code' for the system select the 'Use as your default tax code' checkbox

In this screen enter the tax code, percentage and description of the tax code entry. This will be selectable from a drop-down menu on client, candidate and invoice records.

To assign a tax code as the 'default code' for system select the 'Use as your default tax code' box. This will automatically appear in each client record unless an alternative is manually selected from the list.

25. Currency Table

Where there are requirements to issue invoices in currencies other than the default value, additional currencies and the current exchange rate can be configured in this section of Eclipse.

The currency table displays a list of all currency entries currently configured in the software. Eclipse is supplied with the default value of pounds (£) only.


The currency table displays the name, code, symbol and exchange rate of all those configured. These can be amended or added to using the standard 'Add' and 'Edit' buttons at the foot of the screen.



A	Name	Code	Symbol	Exchange Rate
	Dirhams	AED	\$	6.50000
	Australia, Dollars	AUS	\$	2.48531
	Azerbaijan Manat	AZN	Z	2.31963
	Canadian Dollar	C\$	\$	1.00000
	Euro	EUR	€	1.46368
	United Kingdom, Pounds	GBP	£	1.00000
	Norwegian Krone	KOR	K	1.00000
	America (United States of America), D...	USD	\$	1.84013
	South African Rand	ZAR	R	14.90000

The currency table displays a list of all currency entries currently configured in the software

As with all over sections in the Maintenance menu, double clicking on any entry will launch the edit currency screen.



Name :
 Code :
 Symbol :
 Exchange Rate :
 Timestamp :

Enter the 'Name', 'Code', 'Symbol' and 'Exchange Rate' for the currency

The exchange rate should be relative to the currency specified as the default currency in the Eclipse Default Preferences section of the maintenance menu

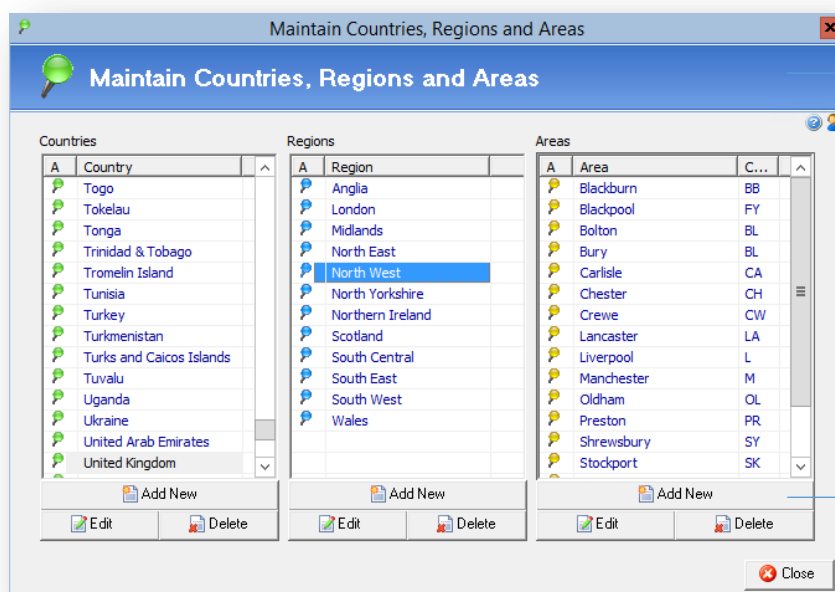
Enter the name, code, symbol and exchange rate for the currency. The exchange rate should be relative to the currency specified as the default currency in the Eclipse Default Preferences section of the Maintenance menu and should be updated manually as and when required. Finally, the 'timestamp' field keeps a record of when the currency record was last updated.

Note: Whenever an invoice is created, it takes the value of the currency at the point of creation. Where exchange rates are altered, all historic invoices will have the conversion rate as correct at the point of creation.

26. Countries, Regions And Areas

Within Eclipse, maps and drop down lists of locations are used to identify the whereabouts of clients and candidates and additionally, the relocation areas of candidates. By default, the United Kingdom map and list are separated into regions and areas (based on the Royal Mail postal towns postcode prefix). Additional regions and areas can be added to the UK list using the standard 'Add', 'Edit' and 'Delete' buttons in the screen below. When adding a postcode to a client or candidate record Eclipse will automatically select the region and area based on the postcode prefix.

Note: Any additional regions and areas will only appear in the drop down lists in Eclipse and not the maps of the United Kingdom.



By default, the United Kingdom map and list are separated into 'regions' and 'areas' based on the Royal Mail postal towns. Each area is allocated with a prefix which automatically populates the regions and areas in the client and candidate records when added

Any additional regions and areas will only appear in the drop down lists in Eclipse and not the maps of the United Kingdom.

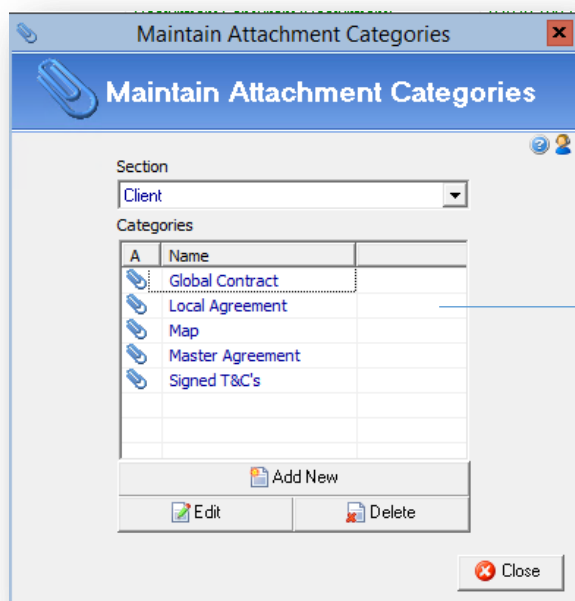
The regions are areas for all other countries in this section are blank by default. To create a list of regions and / or areas for countries other than the UK, first highlight the country in the column on the left hand side. Use the 'Add', 'Edit' and 'Delete' buttons to manage the lists.

Note: Maps are not available in Eclipse for countries other than the United Kingdom.

27. Attachment Categories

Documents can be attached to client, candidate, vacancy, interview, temp contract, timesheet and invoice records in Eclipse. In order to keep these documents well organised, this section of the Maintenance menu allows for the creation of a general list of storage folders for each section of Eclipse. Each record in Eclipse will then hold the corresponding list of folders configured below:

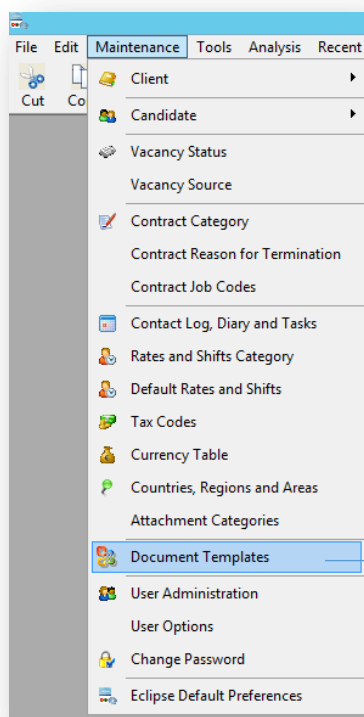
Before adding a new folder, first select the section of Eclipse the folder is intended for from the list. Use the standard 'Add New', 'Edit' and 'Delete' buttons to manage the folders.



This section of the Maintenance menu allows for the creation of a general list of storage folders for each section of Eclipse

28. Document Templates

This facility allows the creation of document templates required for correspondence via letter, e-mail and SMS text message. Additionally, this feature also allows the output of custom built Excel exports. In order to administer this feature of Eclipse, select 'Document Templates' in the Maintenance menu as shown below.

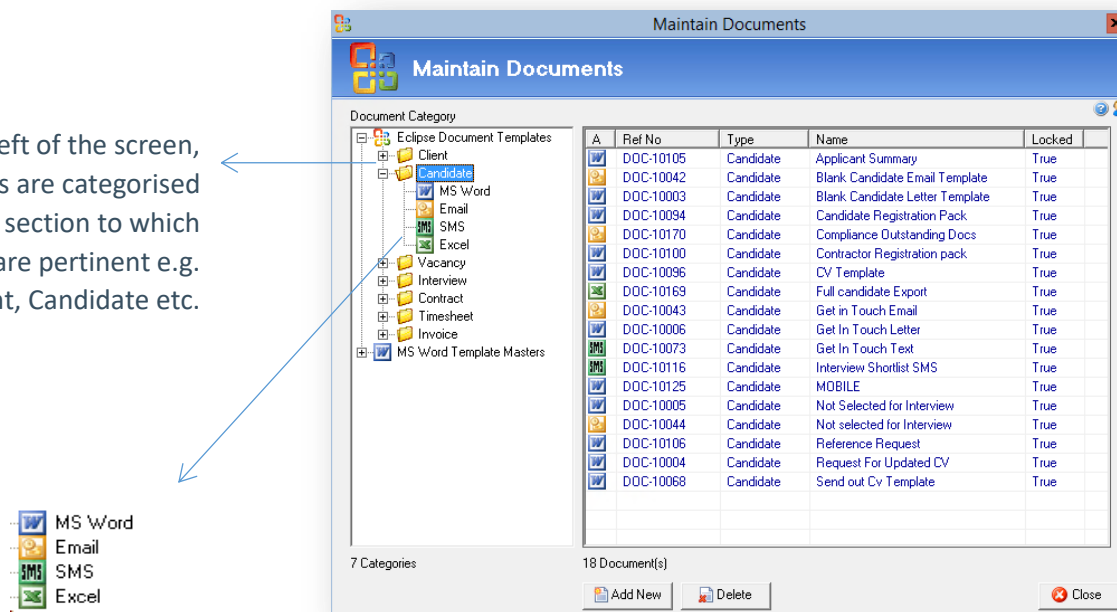


Select 'Document Templates' from the 'Maintenance' menu

Selecting 'Document Templates' activates the following window: 'Maintain Documents'. This section of the Maintenance menu initially provides 26 standard document templates suitable for outputting either letters or e-mails through Eclipse. These templates utilise a mail merge feature for quick and easy output of correspondence. Further templates can be added to this section as and when required. Additionally, templates for excel exports can be configured here and text messages templates for use in conjunction with the SMS bolt-on feature.

On the left of the screen, documents are categorised by the section to which they are pertinent e.g. Client, Candidate etc. The type of document is easily identifiable by the logo displayed next to each document record in the list.

On the left of the screen, documents are categorised by the section to which they are pertinent e.g. Client, Candidate etc.



The type of document is easily identifiable by the logo displayed next to each document record in the list.

Selecting a category in the tree view on the left (e.g. client) will display a list of ALL document templates within that section, regardless of type, in the window on the right.

To view specific document types only, e.g. word documents, relating to that category, simply select the 'Word' icon within the required category. The results window will now display only Word document templates. The same applies to E-mail and SMS templates and excel exports.

Opening other sections (e.g. vacancy) is achieved by clicking the '+' in the tree view in the left hand window. As per the above image, the three 'document type' icons appear.

At the bottom of the document category tree, there is a section entitled 'MS Word Template Masters'. This section is broken down into the various sections in Eclipse and displays Microsoft Word Master Templates. These templates are often the starting point when creating new template documents.

29. Creating a new email Document Template

To create a new e-mail document template simply select 'Add New' to open the screen below:

Select a 'Type' and 'Output Type' from the drop down lists

Enter a 'Name', and if desired a 'Description' of the document template

In order to assign the document to a section of Eclipse, select the document type from the drop down list. Next choose the 'output type' e.g. Word / E-mail / SMS / Excel from the drop down list.

Assign the document a name. This will be used for selection purposes when sending correspondence. Adding a description for reference purposes may also be useful. Selecting 'Save' at this point will present the following 'Document Details' screen:

Select the desired database fields by ticking the box to the left of the field

Include the candidate industries, disciplines, skills, qualifications and RTW information by ticking the boxes

Select 'Amend Template' to open the document for editing.

The left side of the window displays the document specifics e.g. Ref No., Date Registered, Type, Output Type, Name and Description. In the bottom left hand corner, there is a date stamp detailing when the document template was last updated and by who. When viewing a document's details, these options are all locked.

The 'Available Fields' section on the right lists all the available merge fields from the specified section of Eclipse (in this example, the client section) which may be used in the document. Scroll through the list, selecting the merge fields required for the template by ticking the box to the left.

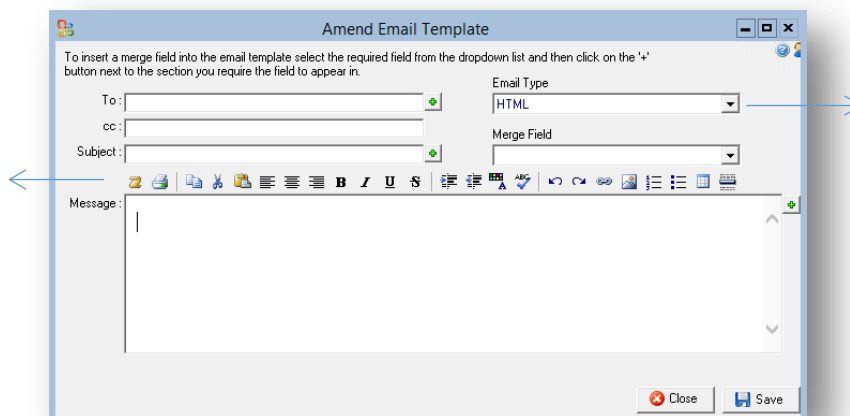
Ticking the candidate's 'Primary Industries Disciplines and Skills' will pull through just the primary industries disciplines and skills from the candidate record, you can also tick the individual 'Industries' 'Disciplines' and 'Skills, this will allow you to merge the individual sections if required, where there are multiple values the selection will be comma separated.

Only select the merge fields necessary for the document. Selecting 'all' will slow down the data merge and will increase the time it takes to send the e-mail. This is particularly important when creating templates for mass mailings.

Once all the desired merge fields have been selected, click 'Amend Template'. This will open the document to be edited. In this case, selecting 'Amend Template' activates the 'Amend Email Template' window below.

E-mail templates can be created in either plain text or HTML formats. HTML allows for the alteration of fonts and colours and the insertion of logos and images using the toolbar highlighted below. Such features are not available for e-mails in the plain text format. The following example uses a 'HTML' format.

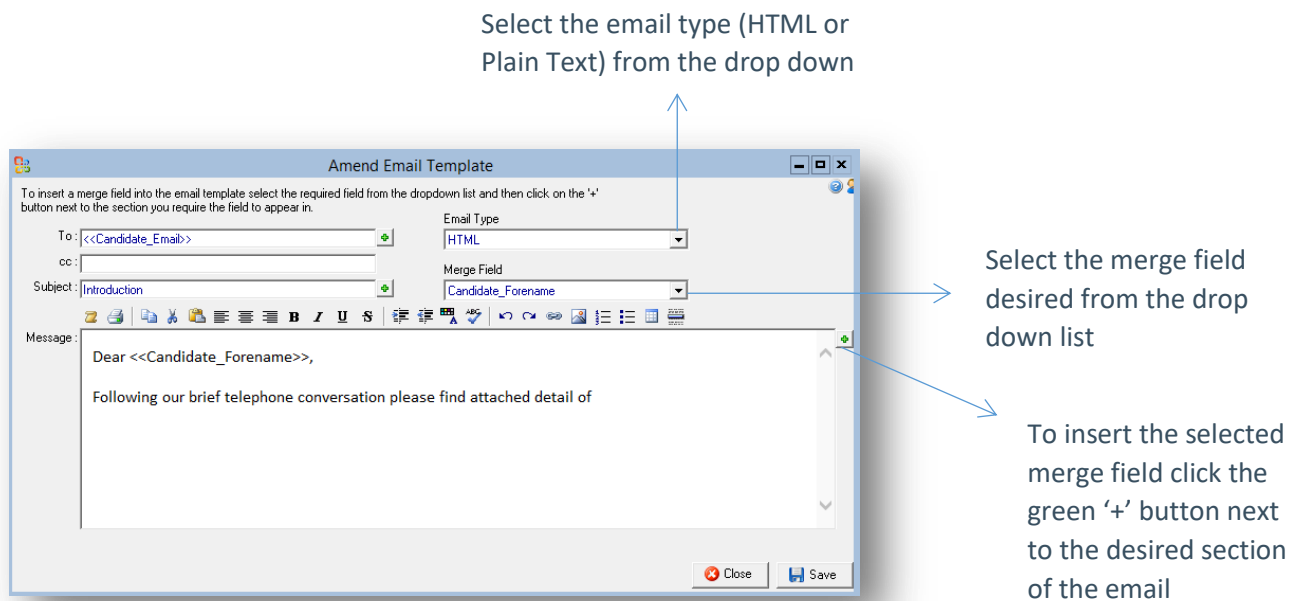
HTML allows for the alteration of fonts and colours and the insertion of images



Email templates can be created in either 'Plain Text' or 'HTML' formats. Select the preferred format from the drop down menu

All template editing is performed using mail merge type editing functions. Database fields can be placed amongst standard text which will automatically populate when a document is created.

Select a merge field from the drop down list on the right and insert into the template by clicking the '+' button next to the box in which the field is to be inserted.



Wherever a merge field appears in the template the corresponding piece of information will be pulled through from the database and inserted in its place once the data is merged.

To create email templates containing company logos or coloured fonts, take advantage of the toolbar above the message box. This will allow more adventurous templates to be created using fonts and font styles, colours, tables, bullet points etc. Any emails created as HTML will also benefit from having the option to include images such as logos and there is also a spell-check facility built in. It is also possible to create email template using HTML code. Simply select the first button on the toolbar, 'Toggle Design / code view'.



Rolling the cursor over any of the buttons on this toolbar will provide a tool-tip description of the button's function. This is the same as any other function buttons within Eclipse.

Once the template is complete select 'Save' on the above screen. Select 'Save' again on the subsequent 'Document Details' screen. The email template is then ready for all to use.

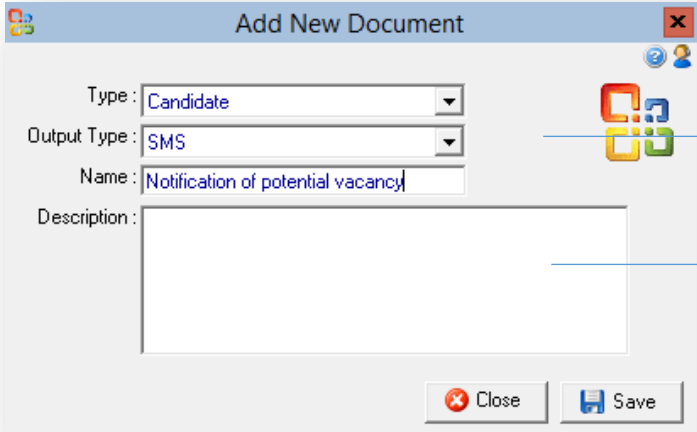
29.1 Editing And Deleting Existing Templates

To edit an existing document template, select the desired document from the main list. The process for editing the document template is now the same as creating a new one as explained above.

To delete a document template, simply highlight the desired template in the main list and select the 'Delete' button from the foot of the screen.

30. Creating A New SMS Template

Where the SMS bolt-on is activated, the creation of SMS templates is almost identical to the process for plain text email templates as outlined above. Select 'Add New' from the bottom of the initial screen. Complete the details as required ensuring to select 'SMS' from the 'Output Type' drop down:



The screenshot shows a dialog box titled "Add New Document". It contains the following fields and controls:

- Type:** A dropdown menu with "Candidate" selected.
- Output Type:** A dropdown menu with "SMS" selected. An annotation points to this dropdown with the text: "Select SMS from the 'Output Type' drop down menu".
- Name:** A text field containing "Notification of potential vacancy".
- Description:** A large text area. An annotation points to this field with the text: "Enter a name and description for the template as required".
- Buttons:** "Close" and "Save" buttons at the bottom right.

Once complete select 'Save' to move onto the next step:

As per the example above for creating e-mail templates, select the desired merge fields for the SMS message from the list on the right.

Select the desired merge fields for the SMS message from the list on the right

Select 'Amend Template' from the foot of the window to create the SMS message

Once the relevant fields are checked, select 'Amend Template' from the foot of the window to create the SMS message. For SMS messages there is a limit of 160 characters for the message body.

Insert merge fields by selecting the desired field from the drop down list and then clicking on the green '+' button next to the relevant section

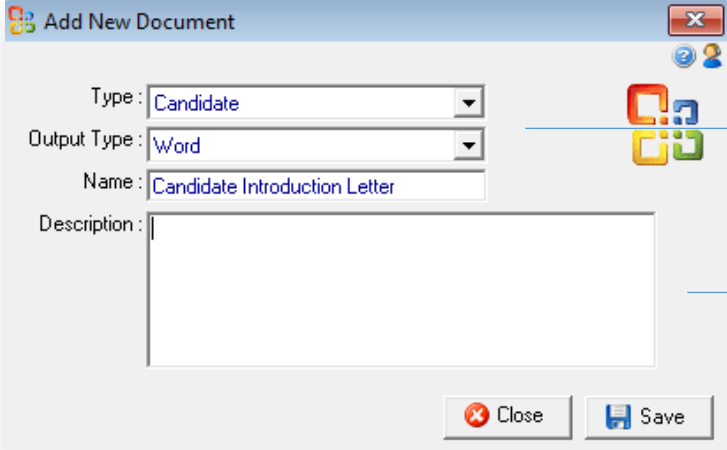
Once the template is complete select 'Save' and then 'Save' again on the screen that follows

Create the body of the SMS message in exactly the same way as e-mail templates. Insert merge fields by selecting the desired fields from the drop down list and then clicking the green '+' button next to the relevant section. Once the template is complete, select 'Save' and then 'Save' again on

the screen that follows. The template is then ready to use assuming the SMS bolt-on had been activated.

31. Creating A New Word Document Template

Letter templates are created in a similar fashion to e-mail and SMS templates. First select 'Add New' from the main screen and complete the form below with the relevant information:



Select 'Word' from the 'Output Type' drop down menu

Enter a name and description for the template as required

Select 'Save' on this window to open the 'Document Details' screen below. As in the above examples, choose the merge fields required for the document by ticking the desired fields. Ticking the 'Candidates Right to Work Information' will allow you to merge the right to work information for the Candidate. It will present 'Yes' if the right to work selection has been approved, it will present 'No' if the selection has not been approved. It will list the right to work description and any associated expiry dates against the selection. Any right to work choices that are marked as not applicable will not be displayed in the merged document.

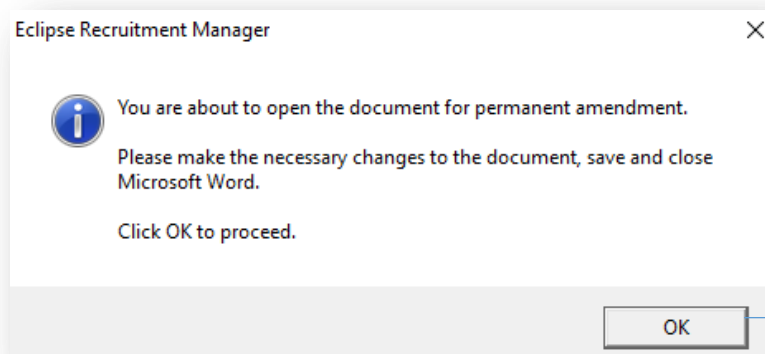
Note: The merge fields for the candidates 'Industries Disciplines and Skills' and 'Right to Work' information can be used on every record template apart from the client record.

Select the desired merge fields for the letter from the list on the right.

Select the desired additional merge fields for the letter from the list on the left

Select 'Amend Template' from the foot of the window to create the letter

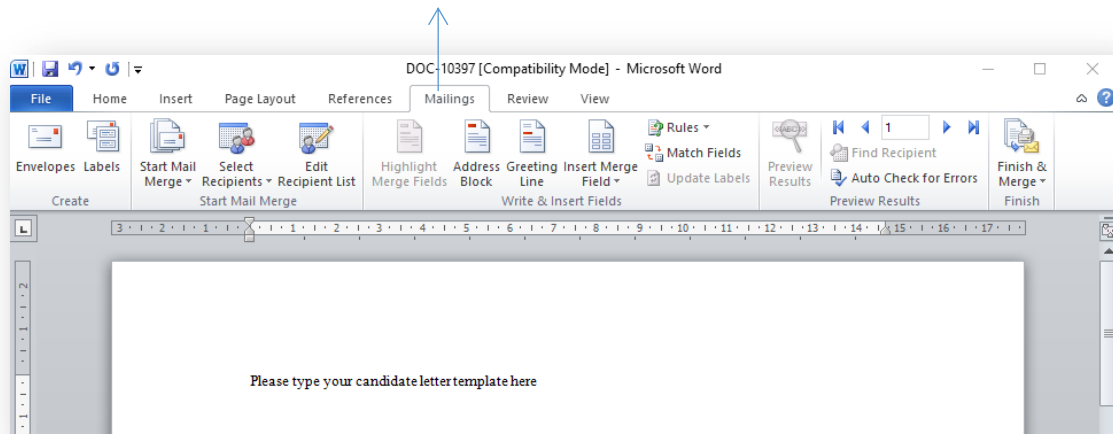
Finally select 'Amend Template' from the foot of the screen. At this point Microsoft Word will open and the following warning appears: Select 'OK' to proceed.



Select 'OK' to proceed and open the Word document

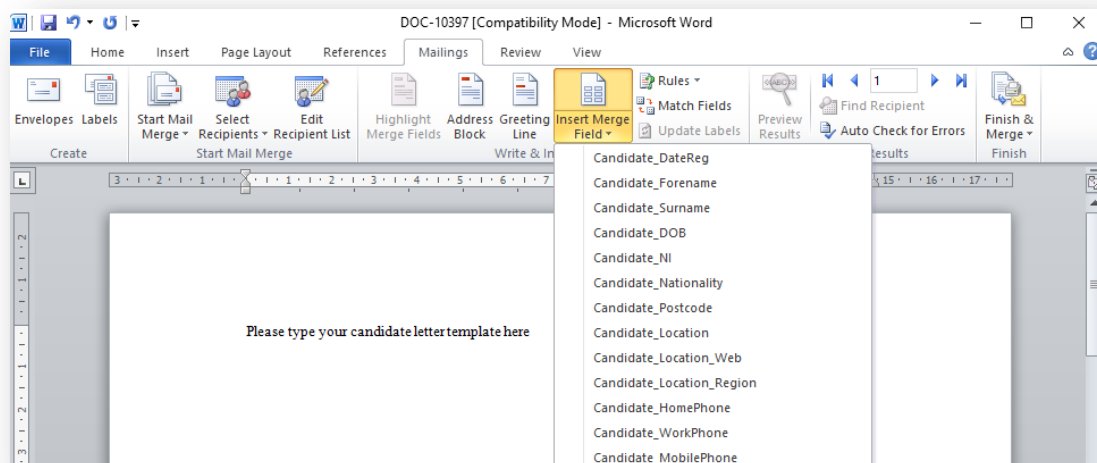
A new Word document will not open as shown below:

The blank document template appears with the 'Mailings' toolbar already selected



The 'Mailings' tab at the top of the screen allows the configuration of the document template e.g. inserting merge fields etc.

When configuring the letter, the merge fields chosen in the document details window in Eclipse can now be added to the document amongst the standard text. Use the 'Insert Merge Field' button on the Mailings toolbar as shown below:



The image below depicts an example template complete with merge fields:

«Candidate_Forename» «Candidate_Surname»
 «Candidate_A1»
 «Candidate_A2»
 «Candidate_A3»
 «Candidate_A4»
 «Candidate_Postcode»

Monday, 20 February 2017

RE – Request for Updated Details

Dear «Candidate_Forename»,

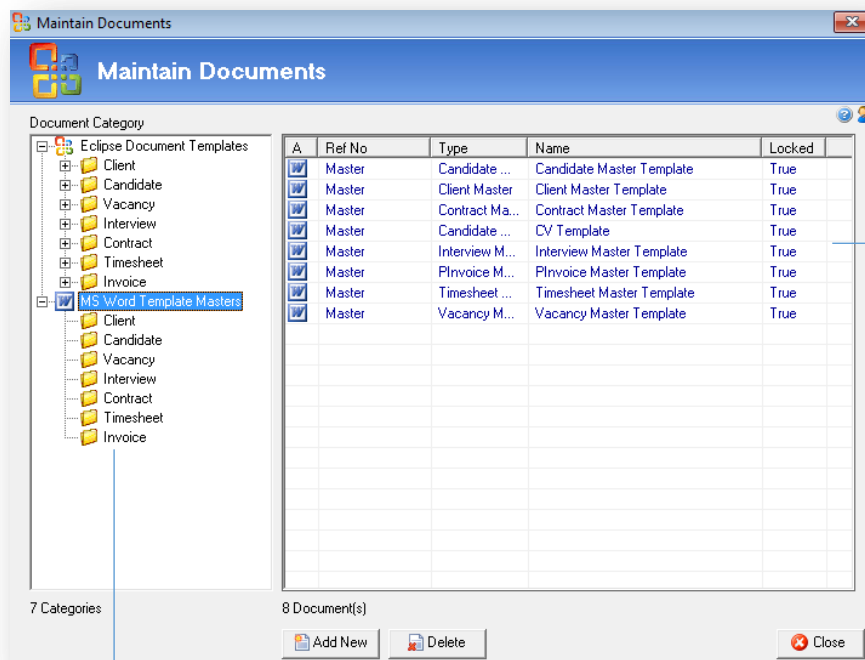
To save the document template, select the 'Save' icon on the toolbar at the top of the screen and then close the document. Finally select 'Save' again on the document details screen below. The word template is then ready for all to use.

Save the template as usual in Word then select 'Save' in the Document Details window

32. Master Document Templates

The previous section explained how to create a new word document template using merge fields. To save repeating this process for documents of a similar style and format, Eclipse allows the creation of master document templates. These templates will then serve as a starting point to any further Word documents created.

Select 'MS Word Template Masters' from the 'Document Category' tree. The window to the right displays a list of all the template masters regardless of which section of Eclipse they relate to. Clicking on the individual section in Eclipse e.g. 'Client' will break down the documents by category.



All MS Word Template Masters are listed to the right of the 'Maintain Documents' window

Clicking on the individual section of Eclipse will break down the documents by category

To create a new master template, simply select 'Add New' and follow the same process as creating a new Word document template as outlined above.

33. CV Formatting Options

Where a candidate's original CV is imported into Eclipse, the system automatically generates a send-out CV which is stored in the attachments section of the candidate's record.

Note: This send out CV is not, at this point, suitable for issuing to clients, it will first require formatting.

There are two starting points for formatting the send-out version of a candidate's CV within Eclipse:

- The send-out CV is initially an exact copy of the original which can be formatted and saved as required. For example, the candidate's personal details removed and the company logo inserted at the top of the page.
- The send-out CV is initially a pre-configured CV template into which information can be added. This ensures that all CV's issued to clients are in the same company format etc.

Firstly, decide which option will provide the best starting point for the formatting of the candidate's CV's and set the Eclipse Default Preferences accordingly. This can be found in the 'Candidate' tab of 'Eclipse Default Preferences' within the 'Maintenance' Menu as shown below:

Select whether you would like to create the send-out CV from the original or from a template

To bypass the Eclipse safety net and automatically set all send-out CV's to 'Approved' select this option

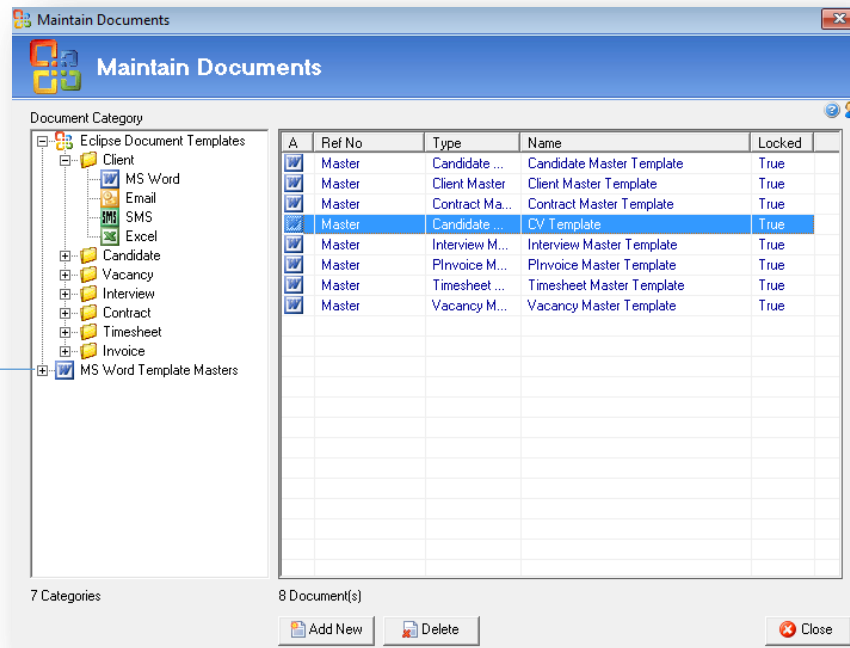
To create the send-out CV from the candidate's original CV select the first box at the top of the screen. To create the CV from a template, select the second box.

The final option relating to candidate's CV's, is the option to automatically set send-out CV's to 'approved'. This will bypass an Eclipse safety net which prevents CV's from being attached to e-mails and sent to clients before their status has been manually set to 'approved'. This ensures that CV's are not forwarded to clients either in their original state or simply as a bank template.

33.1 Creating A CV Template

One method of formatting a candidate's CV is to start with a pre-formatted CV template. This will ensure that each and every CV appears in exactly the same format regardless of the content. To create a CV template, select 'CV Template' in the 'MS Word Template Masters' section of the menu as shown below.

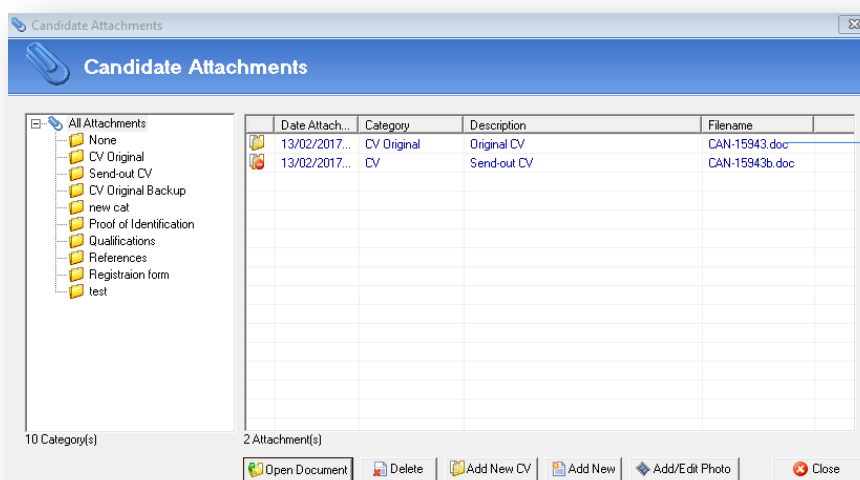
To create a CV template
select 'CV Template' in
the 'MS Template
Masters' section



Initially this document is blank. Format it by adding company logos and / or headers as desired. Once saved, the margins, fonts and sizes configured here will be copied through to any candidate CV's created via this template.

33.2 Formatting A Candidate's CV Using A Template

Firstly, create a new candidate record in Eclipse, attaching the original CV. Once the import has taken place and the record has been saved, select the paperclip icon at the foot of the candidate's record to display all attachments. This will show a list with the two versions of the candidate's CV:



To open the CV template
highlight and select 'Open
Document'

Firstly, highlight the Original CV and select 'Open Document'. This will open the candidate's CV in Word. Secondly select the Send-Out CV and open the document. Both documents should now be open. At this point, the send-out CV is a copy of the CV template configured in the Document Templates section of the Maintenance Menu. Format the CV as required e.g. copy and paste information from the original into the template. Save the document as usual once the alterations have taken place. To approve the CV for send-out, double click on the CV in the list to open the following screen:

To approve the candidate's CV select: 'CV has been approved for send-out'

To approve the candidate send-out CV, select 'CV had been approved for send-out'. The CV cannot be attached to an e-mail within Eclipse and issued to clients.

33.3 Formatting A Candidate's CV From The Original

As with the example above, import the candidate's CV into Eclipse. Eclipse will save a copy of the candidate's original CV and a send-out version of the CV. At this point the send-out CV is an exact copy of the original. Open the send-out document and edit as required E.g. remove personal information and insert the company logo etc. Once the relevant alterations have taken place, save the document and 'approve' as described above.

33.4 Creating A Macro

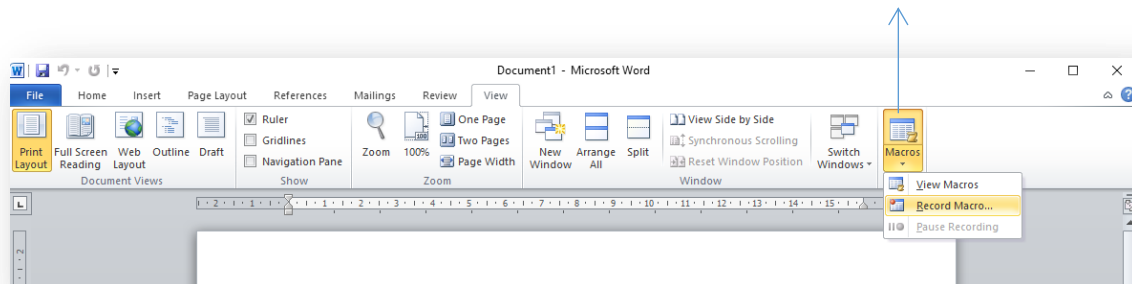
Where a candidate CV's is to be formatted starting with an exact copy of the original CV, it is common to remove candidate's personal information and insert a company header before approving it for send-out. In this case it may be useful to create the header using a Macro within Microsoft Word.

Macros are useful if a task is repeatedly undertaken in the same way e.g. adding a logo to the top of a CV. This process can be automated using a macro. A macro is a series of Word commands and instructions that are grouped together as a single command to accomplish a task automatically, for

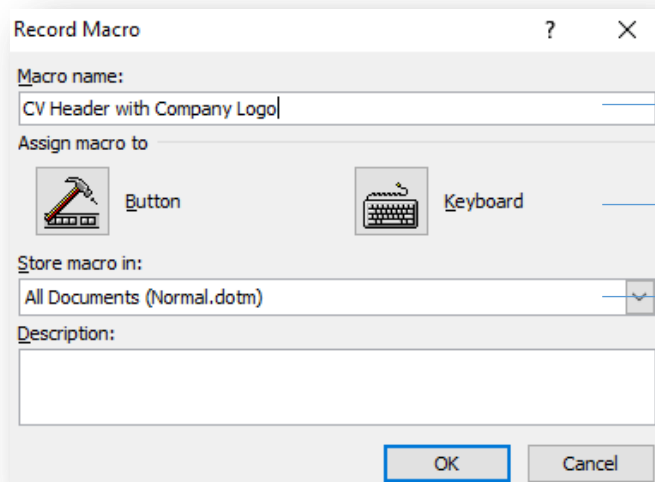
example routine editing and formatting, in this case inserting a header and company logo into a CV. By creating a macro the header can be inserted into a CV using a single command.

To create a macro, first open Microsoft Word. From the main toolbar at the top of the screen select the 'View' tab and then the 'Record Macro' button as shown below.

To create a macro, first open Microsoft Word. From the main toolbar at the top of the screen select the 'View' tab and then the 'Record Macro' button.



Before recording the macro, assign the command a name E.g. CV Header. Secondly, select what the macro is to be assigned to, in this example it is the keyboard. Finally, confirm whether the macro is to be assigned to an individual document or apply to all documents. Select 'OK' to save.

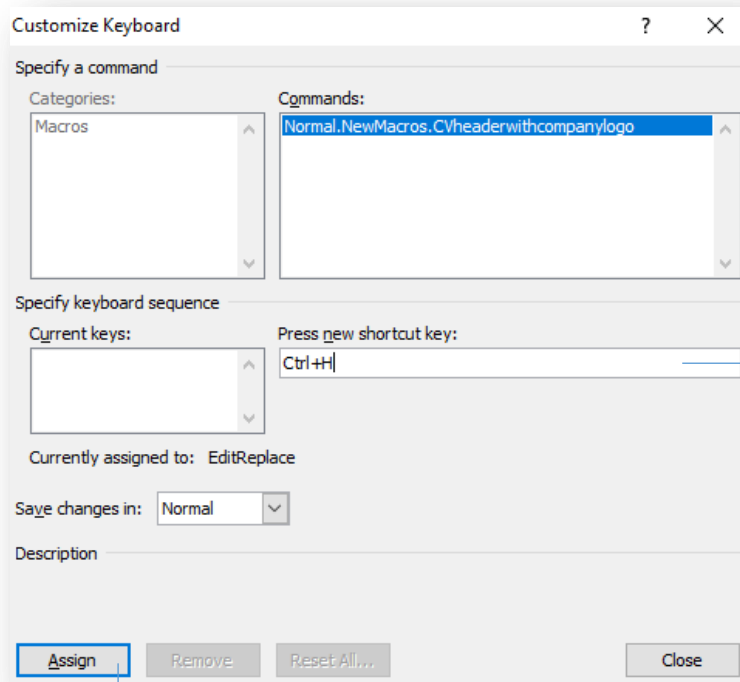


Assign the macro a name

Assign the macro to the keyboard

Store the macro against all documents

Where a macro is assigned to the 'keyboard', the following window appears. In the field 'Press new shortcut key', enter the key sequence assigned to the macro. In this case it's 'Ctrl' and 'H' pressed together.

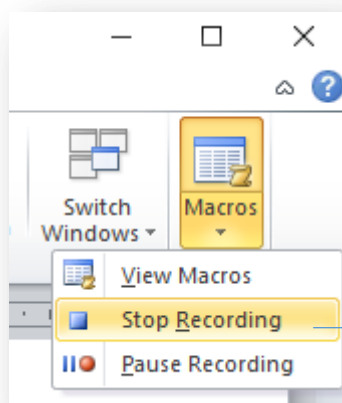


Enter the keys sequence assigned to the macro

Select 'Assign' and then 'Close' to begin recording the macro

Once the information is complete, select 'Assign' and then 'Close' to begin recording the macro. At this point create the header for the CV. The process will be recorded by the Macro.

Word will record the text and / or images inserted into the document from this point. Select 'Stop Recording' (as shown below) once the action is complete.



Select 'Stop Recording' once the action is complete

The macro is now complete. As per the above example, selecting 'Ctrl' and 'H' together in any Word document will now insert the header.

33.4 Formatting CV's using a Macro

To put the macro to use, open the send-out version of a candidate's CV. Remove any personal information as required. As per the above example, simply pressing 'Ctrl' and 'H' together will insert the header into the document. Once all necessary changes have taken place select 'Save' and close.

34 Creating A CV Coversheet

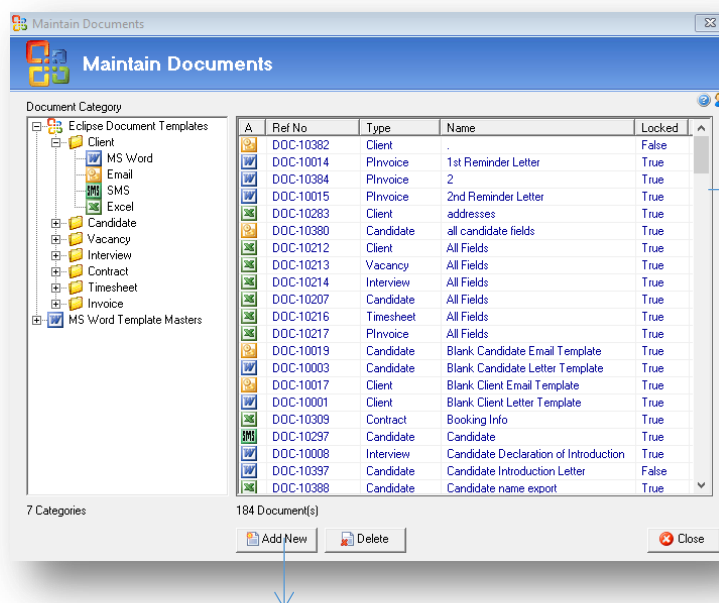
Note: CV Coversheets are applicable to medical databases only

In the instance where CV's are sent to clients by standard mail rather than e-mail, there is a facility in Eclipse to create and output a coversheet from either the client or vacancy records. By following this process in Eclipse a coversheet is outputted but NOT the candidate's CVs. These will need to be printed separately.

The purpose of this feature is to include these CV's in the automatic CV Activity report and the auto shortlist feature. The following explains how to firstly create the coversheet and secondly how to output the coversheet and select the relevant candidates to be updated.

34.1 Creating The Coversheet Document

The coversheet itself is created in the same way as any other document template via the 'Document Template' section of the Maintenance Menu. Selecting 'Document Templates' displays the following screen:



Create the CV coversheet in exactly the same way as a normal Word document template

Select 'Add New' to begin the document configuration process

Select the 'Add New' button to begin the configuration of the CV Coversheet. As usual select the type and output type, provide a name and a brief description if required.

Note: The template itself can only be outputted from either the client or vacancy records in order for the CV activity and shortlist features to be updated accordingly.

The template itself can only be outputted from either the client or vacancy records

Select 'Save' to move to the next stage as shown below.

Configure the document template in exactly the same way as a normal word template. The only additional step is to tick the box labelled 'CV Coversheet' as indicated below. Ticking this box will assign the template as the coversheet and activate the additional features.

Configure the document template in exactly the same way as a normal document template

Remember to tick: 'CV Coversheet'

34.2 Outputting The CV Coversheet

In the example above the CV coversheet template was assigned to the client, therefore the following example shows the output of the coversheet from a client record. Output the document in the same way as any other by selecting the 'Output Letter / E-mail / SMS' button from the bottom of the record as shown below:

Output the document in the same way as any other by selecting the 'Output Letter/Email/SMS' button

Client Details - Barton Grange

Client Details | Branches/Financial | Rates/Unsuit/Agen | Cand Shortlist (0) | AWR | Custom

Ref No: CLI-10518 Date Registered: 13/02/2017 16:22:35

Name: Barton Grange Sector: Agriculture

Address: Barton Road Retail

Postcode: PR3 4RD Client Status: Client

Country: United Kingdom Notes:

Region: North West Consultant: Eli Randall

Area: Preston Division: None

Tel No: 01514789456

Fax No:

Contacts:

Name	Tel No	Mobile	Email	Position	Fax No
Gary Barton	01548789456	0774568978	gary@bar...	Managing...	

Last Contact Log: 21/02/2017 09:34:12 - Eli Randall - 1.02 Client Follow-Up Call - Discussed potential vacancies

Web:

Mainlist Navigation 170 of 190

Man Notes Vacancy Edit Close

The usual Output Letter/Email/SMS screen is shown below:

Output Letter/Email/SMS

Please select the document template you require to output.

A	Ref No	Name	Description
	DOC-10382	.	.
	DOC-10017	Blank Client Email Template	This is a generic email template addressed to the chosen contact f...
	DOC-10001	Blank Client Letter Template	This is a generic letter template addressed to the chosen contact f...
	DOC-10340	Candidate No Contact	SMS for last contact more than 3 months ago
	DOC-10398	CV Coversheet	.
	DOC-10333	dfsdf	sdfsdf
	DOC-10343	hdhd	sjsjs
	DOC-10264	Hello	.
	DOC-10376	Intro - Test	.
	DOC-10002	Introduction Letter From Advertisement	This letter is to send to a new potential client in response to a vac...

DOC-10398 CV Coversheet

Please select from the list below the intended recipient for this document.

Name	Position	Tel No	Email	Mobile
Gary Barton	Managi...	01548789456	gary@barton.c...	0774568978

Gary Barton

Create a Task

Date: []

For: Eli Randall

Category: []

Priority: Normal

Notes: []

Create a Reminder

Cancel Back Next Finish

Firstly, select the CV Coversheet template from the list

Where required create a follow up task and contact log entry

Finally select 'Finish'

Select the CV Coversheet template from the list and where required create a task and reminder by populating the fields in the bottom right corner. Select 'Next' to display the following window:

By default, the screen displays the list of candidates currently in the main candidate interface

Select the desired candidates by placing a tick in the box on the far left

[illegible]

By default this window will display and candidates currently in the main candidate interface. There is the option to 'display list of candidates from' in the top right corner. Select the desired candidates by placing a tick in the box on the far left. Select 'Finish', to display the CV coversheet template and complete the automated recording process.

Note: The candidates selected will be shortlisted and the CV Activity report updated accordingly.

Note: The candidate's CV's are not automatically attached to the CV Coversheet. The CV's should be printed as usual.

35 Outputting Documents

The procedure for outputting documents e.g. letters, e-mails and text messages is the same in all sections of Eclipse. Select the following button from within any Eclipse record. This will open the 'Output Letter / Email / SMS' window as seen below.



This button can be found in the bottom left hand corner of every record in Eclipse.

35.1 Outputting A Word Document

In the following example the 'Output Letter / E-mail / SMS' button was selected from a client record.

Select the 'Output
Letter/Email/SMS button
from the foot of the record

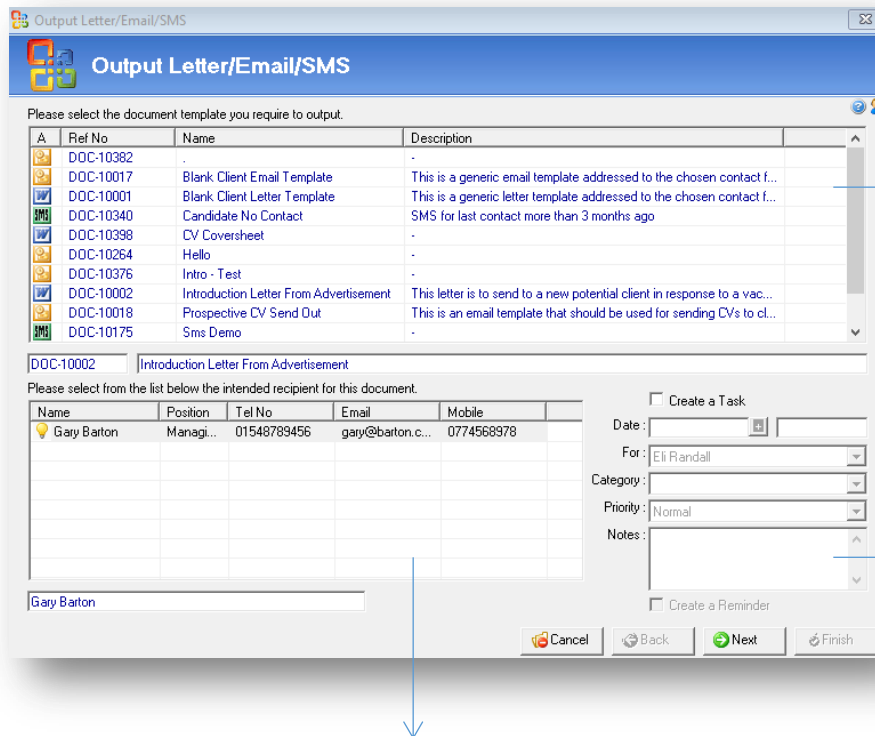
Name	Tel No	Mobile	Email	Position	Fax No
Gary Barton	01548789456	0774568978	gary@bar...	Managing...	

Last Contact Log: 21/02/2017 09:34:12 - Eli Handall - 1.02 Client Follow-Up Call - Discussed potential vacancies

Web: = Primary Contact

Mainlist Navigation 16 of 190 Man Notes Vacancy Edit Close

The following window displays a list of document templates relating to the particular section open in Eclipse e.g. Client. As discussed earlier, document templates are set up and maintained in the 'Document Templates' section of the Maintenance Menu.



The list of document templates shown in the top section of the window relates specifically to the section of Eclipse the record belongs to.

To create a related task and contact log entry complete the fields in the bottom right corner

Once a template is selected a list of potential recipients is displayed

The process of sending an e-mail can be broken down into three steps which will now be explained:

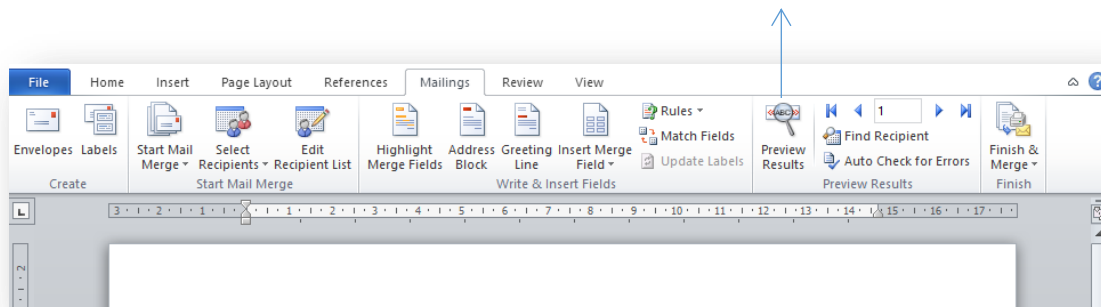
- Step One: Select the required document template from the list. The template type is identifiable by the icon on the left.
- Step Two: As this example relates to the client section of Eclipse, there are potentially multiple contacts. Select the desired recipient from the list in the bottom right section of the window. Contacts will only be displayed if the client contact merge field appears in the document template. If not, there is no need to select a contact.
- Step Three: Where required a task and related contact log entry can be created. Simply tick the box labelled 'Create a Task' and fill in the required fields.

To open the desired template, select the 'Finish' button.

If the template is a Word document, Microsoft Word will launch. The document template will now appear and automatically merge the information from Eclipse.

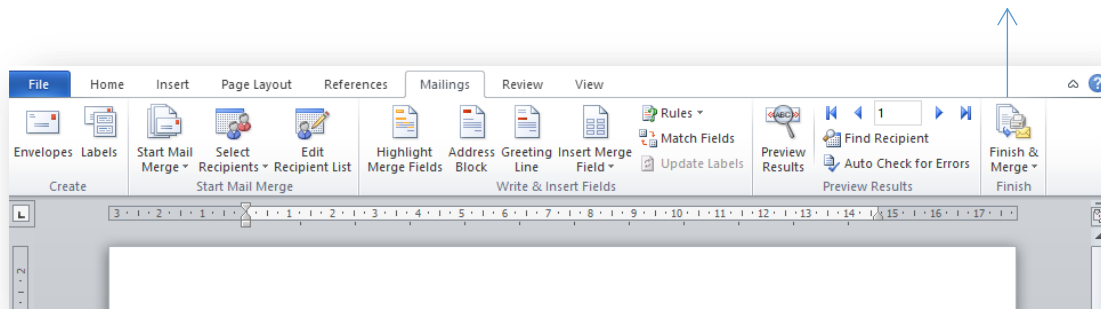
Note: To preview how the document will look containing the information from Eclipse select the 'Preview Results' button before merging to a new document.

To preview how the document will look containing the information from Eclipse select the 'Preview Results' button before merging to a new document



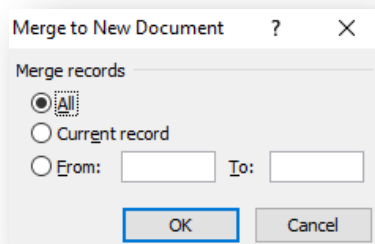
When printing or saving outputted Word documents, ensure to make any changes to the document whilst it is still being viewed as a template, then use the 'Finish and Merge' option before saving or printing.

Use the 'Finish and Merge' option before printing or saving



These buttons are located on the 'Mail Merge' toolbar. Following the procedure outlined above will ensure that any saved documents will contain the merged information rather than a copy of the template.

After selecting 'Finish and Merge', Choose 'Edit Individual Documents' The following pop-up box appears:

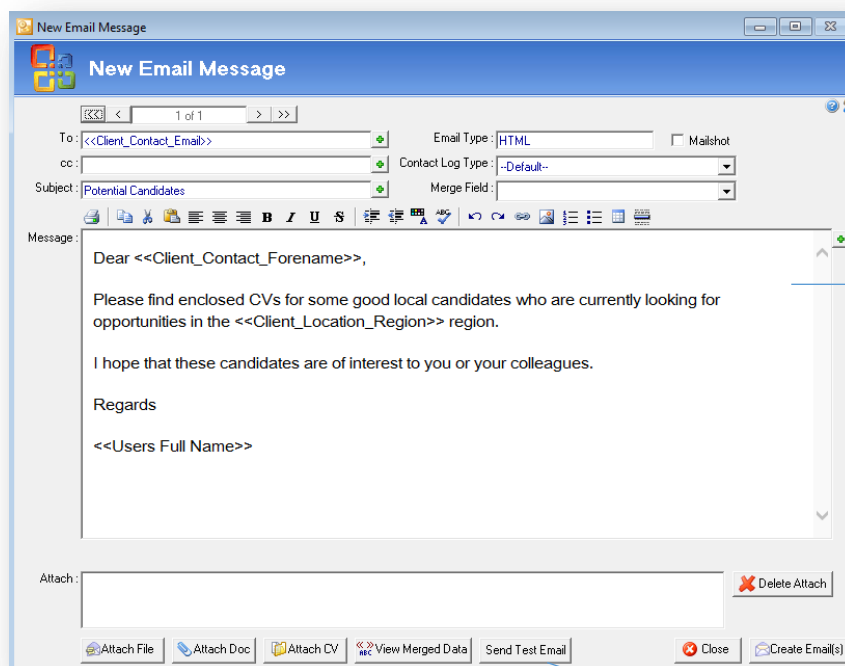


To create the letter, select 'OK'

Save the document as required and attach back into Eclipse if necessary using the lue paperclip icon at the foot of any Eclipse record.

35.2 Outputting An Email Document

If the document to be outputted is an e-mail rather than a Word document, once the recipient has been chosen from the list of client contacts, the email template window will open as seen below. This process will be the same for SMS templates.



Make any alterations to the email where necessary

Select 'View Merged Data' to preview the email

Select 'Send test email' to send a copy to the Outlook Inbox

Wherever a database field appears in the template E.g. <<Client_Contact_Forename>>, the relevant piece of information from Eclipse will automatically appear in its place when the data is merged. To preview the document select the 'View Merged Data' button. The document becomes 'Read-Only' until it is clicked again.

At this point it is still possible to edit the template either by adding additional text or merge fields. Merge fields can be selected from the drop-down list and simply inserted into the template by clicking the '+' button at the relevant place.

Note: The editing controls on the toolbar at the top can be used to format the email and perform a spell check etc. This toolbar is only available for templates that have been configured in the HTML format and not plain text. Plain Text e-mail templates can be easily amended to HTML in the Document Templates section of the Maintenance Menu. Please see the 'Document Template Administration' user guide for more information.

To create a test e-mail, select 'Send Test Email'. This creates a preview of exactly how the email will look to the intended recipient and sends it to the users Outlook Inbox.

It is possible to attach a file to an email by selecting the 'Attach File', 'Attach Doc' or 'Attach CV' buttons. These options will be discussed further in the next section.

Once the e-mail is complete select the 'Create Email(s)' button. This will create the email and present the e-mail outbox ready for sending.

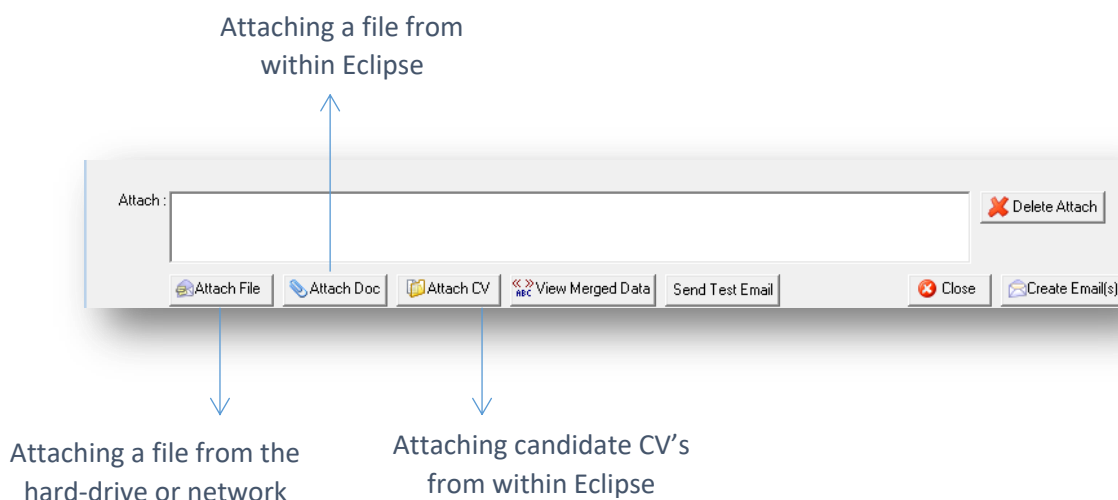
Note: Where Individual consultant signatures have been configured in the User Administration section of the 'Maintenance Menu', they will appear at the bottom of the e-mail when the data is merged.

36 Attaching Documents, Files and CV's To An Email

There are three options for attaching files to emails. There is a button for each option:

- Attach Doc
- Attach File
- Attach CV

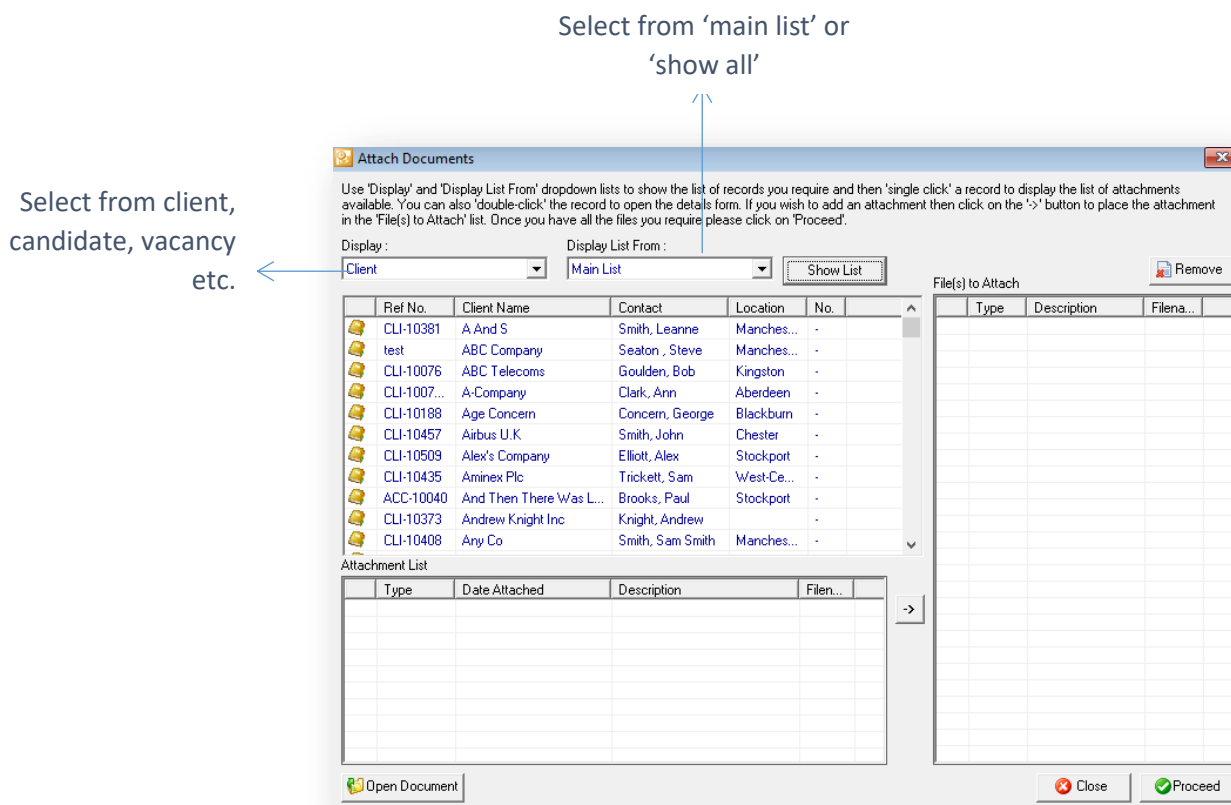
The image below highlights the buttons used for each action:

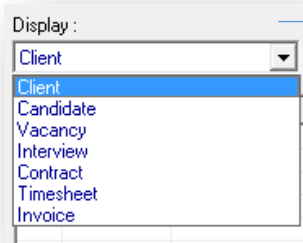


36.1 Attaching A Document To An Email

This section demonstrates the process of attaching a document already stored in Eclipse, to an e-mail. Examples include: copies of terms and conditions, directions to an interview location, job specifications, timesheets or anything that is attached to a record in Eclipse.

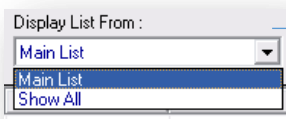
As per the above image, the 'Attach Doc' button is found second from left at the bottom of an e-mail window. This button opens the following window and will allow the attachment of a document that is already stored within a record in Eclipse.





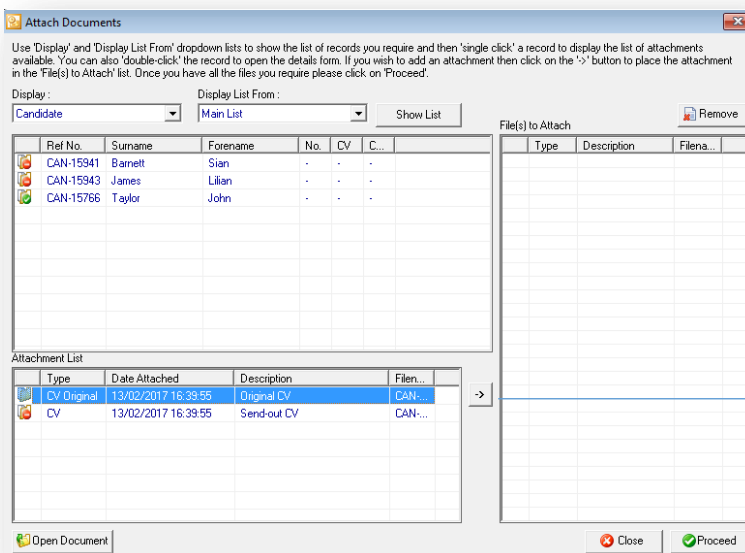
Select a record type from the drop down menu

Use the next option to either display the list of clients that currently appear in the main client interface (usually the results of a search) or show the complete list of clients in the entire database.



Select either main list or show all

Once the relevant options have been chosen, select 'Show List'. The results will appear in the top left hand list in the window as shown above. As per the example below, select the desired client from the list. A list of attachments connected to this record will appear in the bottom section of the window. To view a file, simply highlight it and select 'Open Document' or if preferred, like elsewhere in Eclipse, just double click on it.



Select this button to attach the highlighted file to the email

To attach the selected file to the email, first highlight it and then click the arrow button shown above. The selected file will now appear in the list of 'Files to Attach' on the right hand side of the screen. Repeat this process until all the desired files have been attached.

To remove a document from the 'Files to Attach' list, simply highlight it and select 'Remove'. When you have selected the desired documents, click proceed to attach them to the email.

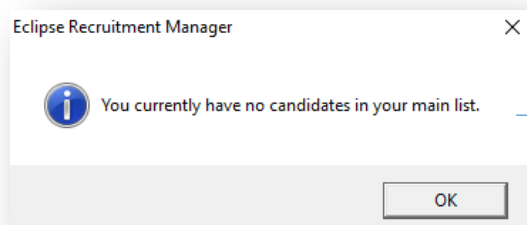
36.2 Attaching A File To An Email Template

Selecting the 'Attach File' button activates the normal Microsoft Windows file manager box. From here search for and attach any file from the hard drive or network. This works in the same way as any normal email attachment.

36.3 Attaching A CV To An Email Template

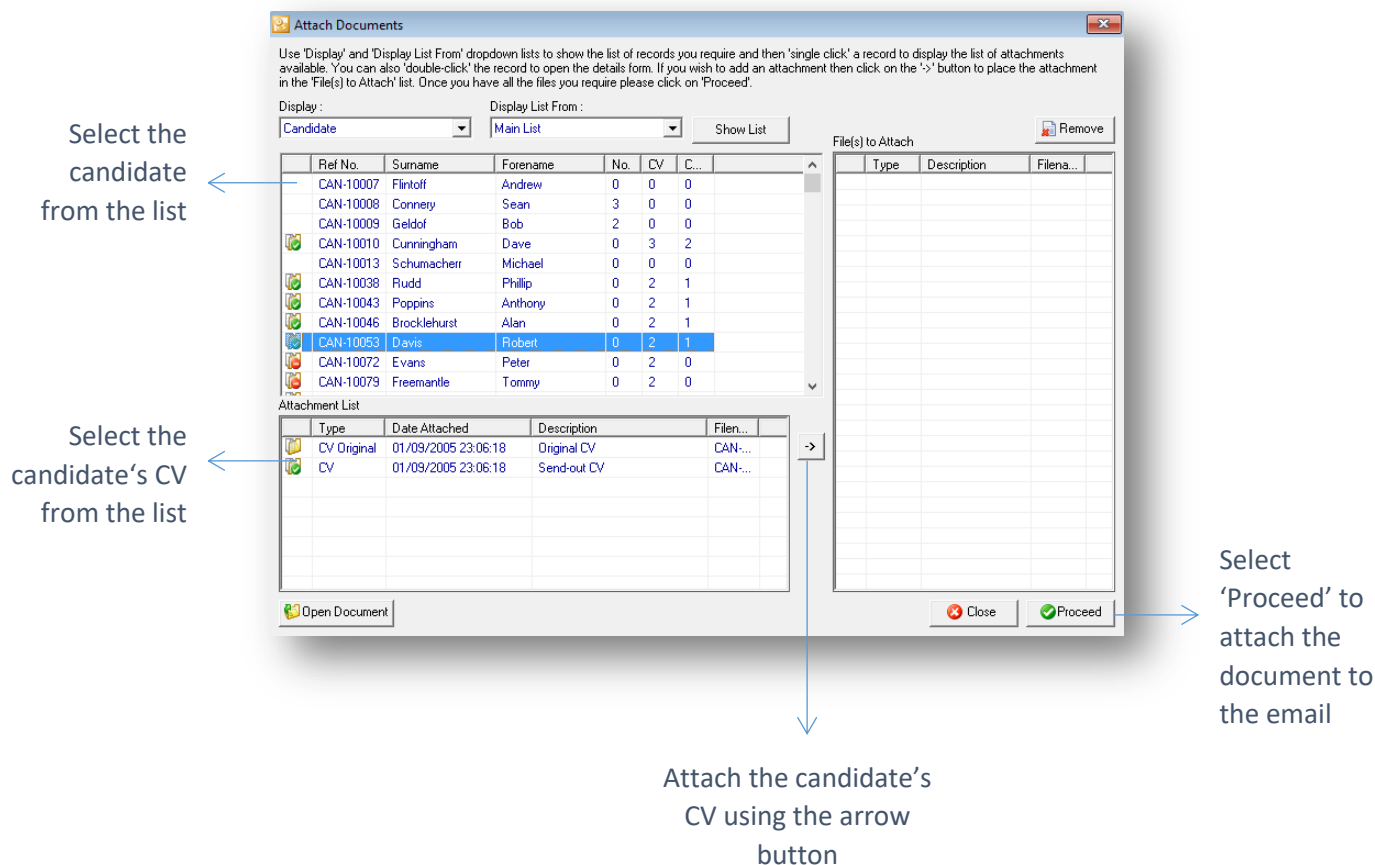
Attaching a CV is achieved in exactly the same way as attaching a document. The example that follows assumes that a shortlist of candidates has been prepared and transferred to the main candidate interface.

Select the 'Attach CV' button to activate the same window pictured above in the attach document example. Eclipse will automatically display the list of candidates shown in the Main candidate interface. Where there are no candidates present in the main candidate interface, the following message will appear.



This warning will appear if no candidates are present in the main window

If this warning appears, to locate the desired candidates either select 'Show All' from the 'Display List From' drop-down and then select 'Show List' or return to the main candidate window, search for the required candidates and then re-select 'Show List'.

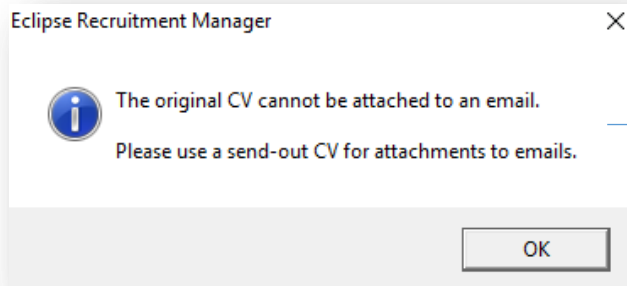


Once the desired list of candidates appear in the section at the top, select a candidate by highlighting them in the list. A list of documents, including CV's attached to the candidate record will appear in the lower list.

In the image above, some of the candidates have a red 'no-entry' icon next to their name. This signifies that their CV has not been edited and approved for send out. A green 'tick' indicates that the candidate's CV has been approved. If there is no icon next to the Candidate's name, there is no CV attached to the candidate record.

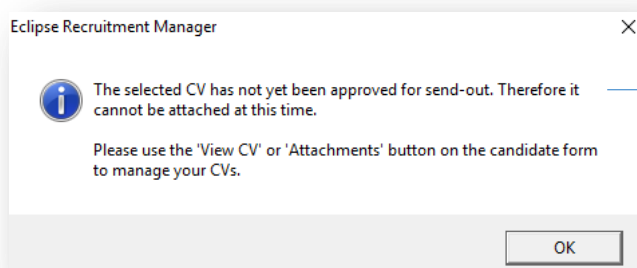
To attach a CV firstly highlight the desired CV in the list and select the arrow button. The name of the document will appear in the 'Files to Attach' section on the right. When all the desired documents have been attached, select 'Proceed'. The CVs will now be attached to the email. When the email is sent, a record will be added to the CV Activity for the Candidate, Client and Vacancy if applicable.

Where an attempt is made to attach a candidate's 'Original CV', Eclipse will prevent the file from being attached and present the following warning.



Warning: The original CV cannot be attached to an email

Similarly, where an attempt is made to attach a CV that has not yet been approved for send-out the following warning will appear.

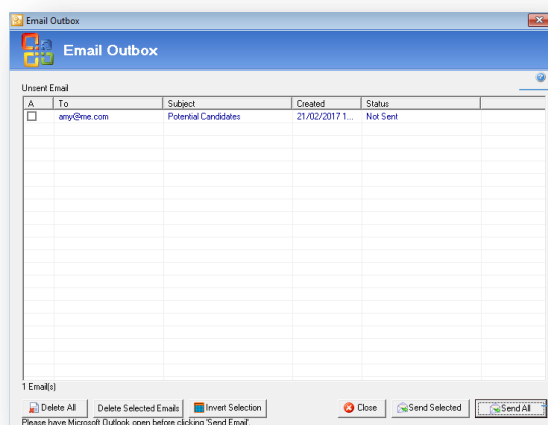


Warning: CV has not been approved for send out

Note: When emailing a candidate's CV to a client with reference to a specific Vacancy, it is beneficial to send the e-mail and attached CV via the vacancy record rather than from the Client. This will ensure that the 'CV Activity' record also appears linked to the Vacancy.

37 Sending The Email To The Outbox

Once an email is ready to be sent with any necessary attachments, simply select 'Create Email'. The e-mail will be sent to the email outbox in Eclipse ready for sending via Outlook.



Emails will appear in the email outbox until they are ready to be sent

To send either 'all' or a selection of emails from the list, choose the relevant option and select send

This is the last opportunity to edit or delete an e-mail before sending. To make amendments to an e-mail at this point, simply double-click to open. Once any amendments have been made, select 'Save and Close' to return to the e-mail outbox. To send all the e-mails in the Outbox, simply select the 'Send All' option. To send selected e-mails in the list tick the corresponding box in the list and select 'Send Selected'. E-mail can be deleted in the same way.

Note: The Email Outbox works in exactly the same way as the SMS Outbox, both of which can also be accessed from the 'Tools' option on the Menu bar, or by pressing 'CTRL+E' or 'CTRL+S' respectively.

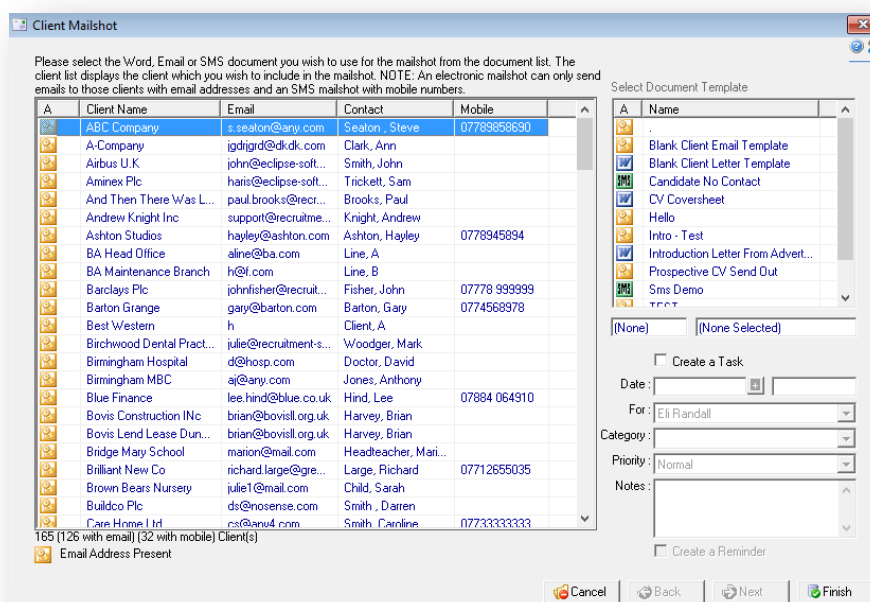
Note: Ensure that Microsoft Outlook is open before sending e-mails from Eclipse. Any replies will appear in the Outlook Inbox.

38. Mailshots

The basis of the mail shot facility in Eclipse is very similar to outputting a single document, the difference here is that rather than sending a letter, email or SMS message to only one recipient, tens, hundreds or even thousands of recipients can receive individually addressed copies of the same piece of correspondence in one single operation.

Note: This is an excellent facility for sending out candidate's CV to multiple clients. Therefore, for the purpose of this example, the mail shot recipients are clients.

The first stage is to generate the mailing list. This is performed using the Search Results List in the main window and can be generated using a combination of saved lists, searching and filtering of results. Once the mailing list is complete and displayed in the main window, select 'Send Mailshot' and the following window appears:



Once the mailing list is complete and displayed in the main window, select 'Send Mailshot'. This window will appear

This window is split into two halves. The section on the left shows the recipient list and identifies those recipients with e-mail addresses saved in Eclipse. The total number is shown in the bottom left hand corner.

In instances where clients have been excluded from mail shots within their record, Eclipse will remove them from the list at this point. This works in exactly the same way for candidates.

The list on the right shows the document templates that can be outputted from this section. To proceed with the mail shot, simply select the desired template and click 'Finish' or double click on the template in the list.

This will open the relevant Letter Template in Microsoft Word or open the 'Edit Email / SMS' window. Operation from here is exactly as described earlier in the guide with the exception that with the mail shot, it is possible to navigate through all of the recipients in the <<ABC>> preview mode prior to sending or printing by using the record navigation buttons on the Word Mail Merge Toolbar and on the Email window.

Finally, there is the option to create a task and contact log entry for each client included in the mail shot. Tick the box labelled 'Create a Task'. Additionally choose a category for the related contact log entry and add any additional notes as required. Click 'Finish' to create the mail shot.

Note: If you are sending to a large number of recipients, Eclipse may slow down when sending the emails.

39. Creating A New Excel Export Template

It is possible to export almost any field of information from Eclipse into an excel spreadsheet. Templates for such exports are configured in much the same way other document templates. Select 'Add New' from the main document screen as complete the type, output type, name and description fields as shown below:

Type: Choose which section of Eclipse the export will be performed from

Output Type: Select Excel from the list

Selecting 'Save' opens the document details screen as pictured below. Choose the fields required for the export by placing a tick in the corresponding box on the right hand side of the available fields section.

Select the fields required for the export by placing a tick in the box

Select the desired merge fields for the export template from the list on the left

To amend the order in which the fields will appear once the export is performed, select 'Amend Field Order'

To amend the order in which the fields will appear when the export is performed, select the 'Amend Field Order' button at the bottom of the screen. The following window will appear:

To amend the order of the fields, highlight a field and select 'Move Up' or 'Move Down' until it appears in the preferred position

To amend the order of the fields, highlight a field and select 'Move Up' or 'Move Down' until it appears in the preferred position. Once the order is complete, select 'Save'. The excel export can now be outputted from the relevant section of the main interface as shown below:



To perform the Excel export firstly navigate to the desired section of the main interface, in this instance the timesheet tab. Select the 'Excel' icon at the foot of the window as shown above. A window displaying any pre-configured formats will be shown. Select the desired export and click 'Output'. The excel spreadsheet will be displayed where any alterations can be made using the standard Excel features.

40 User Options

This section of the maintenance menu is accessible by all users of the software allowing the addition and amendment of contact details and the selection of specific user preferences applying solely to their own profiles. The screen is displayed below:

Eclipse User Options

The following options are for your own user profile within Eclipse.

Full Name : Eli Randall

Job Title : Application Trainer

Email Address : eli@eclipse-software.co.uk

Direct Tel No. :

Mobile No. :

☐ Do not show my diary at startup

☐ Do not use the auto-caps facility

☐ Disable pop-up reminder notifications

☐ Disable contract alerts popup at login

Background Colour : Purple Test

Close Save

Complete the personal information at the top of the screen e.g. name, job title, e-mail address and telephone numbers. The following four options will disable certain features within Eclipse:

Do Not Show My Diary At Start Up:

By default, the Eclipse diary is launched every time Eclipse is opened unless otherwise specified in this screen or in the diary form itself.

Do Not Use The Auto-Caps Facility:

The auto-caps facility, which is set to 'on' by default, will auto capitalise various fields on the client, client contact, candidate forms when completing them. For instance where 'john' is typed into the candidate forename field in the candidate record this will automatically become 'John' when the cursor leaves the text box. That is unless this feature has been de-activated in this screen.

Disable Pop-Up Reminder Notifications:

The 'pop-up box' displaying Eclipse reminders, which appears in the bottom right hand corner of the screen, can be de-activated by ticking the 3rd option in the window above. Please note that all reminders set for either diary and task entries will not be displayed.

Disable Contract Alerts At Login:

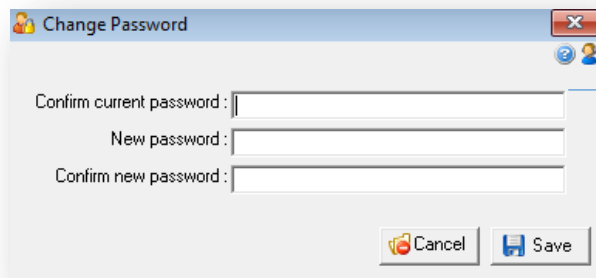
Assuming the user profile has been configured to show contract alerts upon log-in, individuals can disable the reminder by selecting the final option in this box. The contract alert will show how many temp contracts on the system have expired without the assignment of a candidate, how many unassigned contracts have passed their start date but still have potential to be filled and finally how many timesheets are pending where the rates have not yet been agreed with the client.

Background Colour:

By selecting a different colour from the list will allow the changing of the default background colour in Eclipse. You can 'Test' the colour prior to saving the changes.

41 Change Password

This section is also accessible to all Eclipse users and allows the alteration of the log-in password. To change the password, enter the existing password and provide the new detail. Finally, confirm the new password and select the 'Save' button. This will take effect from the next log-in attempt.

A screenshot of a 'Change Password' dialog box. The dialog has a title bar with a user icon, a close button (X), and a help button (?). It contains three text input fields: 'Confirm current password:', 'New password:', and 'Confirm new password:'. At the bottom are 'Cancel' and 'Save' buttons. A blue arrow points from the 'Confirm current password:' field to the explanatory text on the right.

To change the password confirm the existing password and provide the new detail

Passwords can be re-set by an Eclipse administrator via the User Administration section of the Maintenance menu.