PROJECT RECRUITMENT (PMGRMS) END-USER MANUAL

Revision	First Revision
Effectivity	TBA
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1 Introduction

The PMG Recruitment Management System (PMG-RMS) is designed to streamline the hiring process, enhance candidate experience, and improve efficiency in recruitment operations. By integrating advanced features, it allows for better tracking, management, and communication throughout the recruitment lifecycle. This system is built to optimize workflows, reduce manual tasks, and ensure consistency in recruitment practices across the organization.

This implementation plan outlines the steps necessary for the successful deployment of the system, ensuring a smooth transition and providing ongoing support.

PMGRMS is Phase 2 of the e-Recruit project, building on the foundation laid by Phase 1. While e-Recruit focused on initial candidate sourcing and application tracking, PMGRMS enhances the process by integrating recruitment with HR operations, automating manual workflows, and providing more granular reporting and analytics. Phase 2 aims to further improve user experience by offering advanced functionalities like requisition management, real-time candidate assessments, and automated assignment workflows.
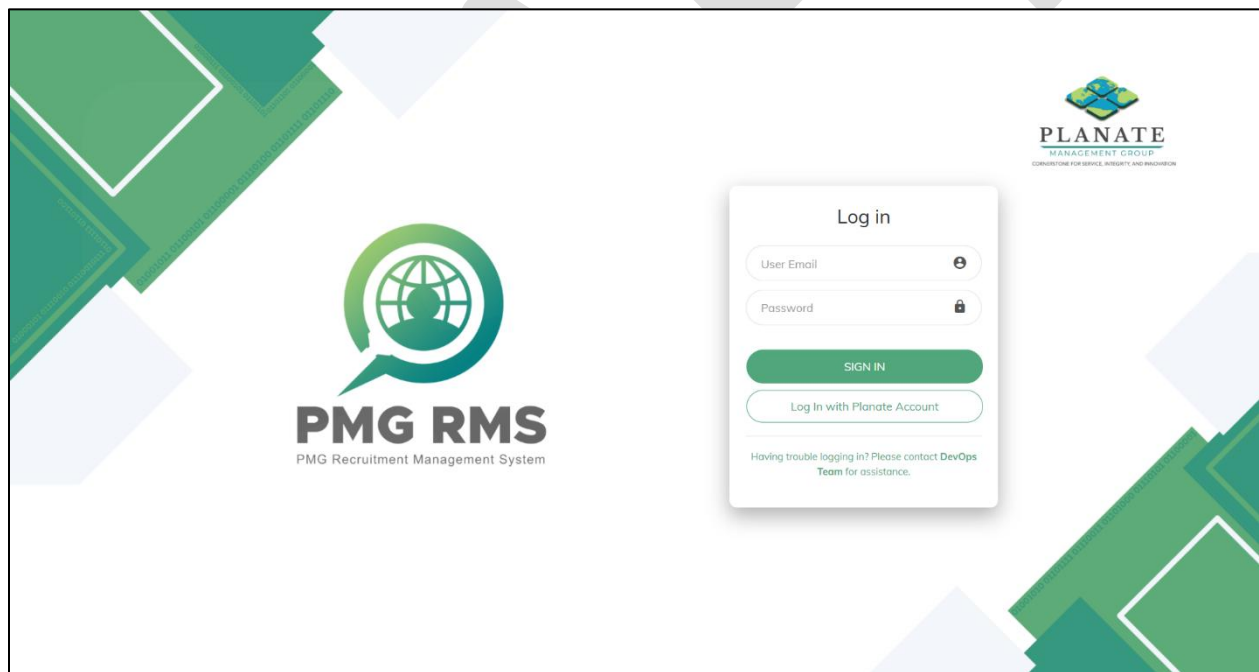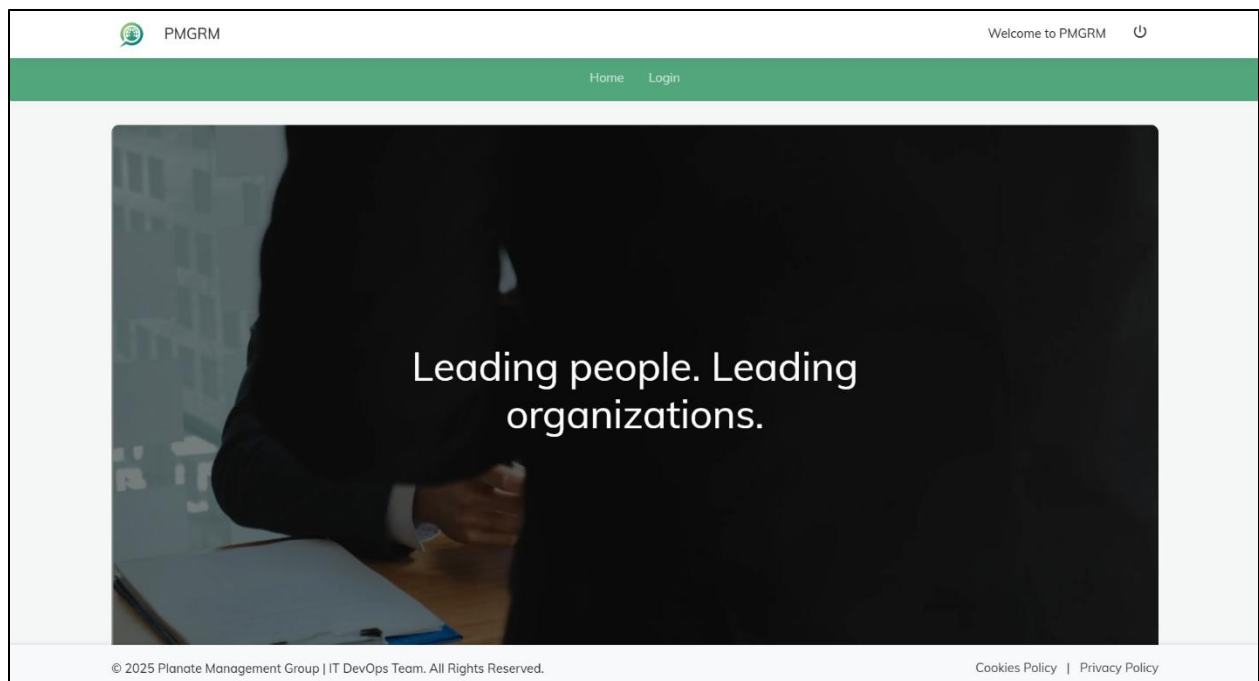
2 Application Features

2.1 User Sign-in

The PMGRMS utilizes the Single Sign-On (SSO) feature, allowing users to securely access multiple applications and company resources using a single set of credentials. In this setup, users log in with their Planate domain email addresses, which are authenticated against Azure Active Directory. Upon successful authentication, users are granted access to PMGRMS and redirected to the appropriate portal based on their user profiles.

2.1.1 Open your browser and to access the PMGRMS, go to this link,
https://pmgrms.planate.com

2.1.2 You will be prompted to this home page, click **Login** to redirect to the login page.

Home　Login

Leading people. Leading organizations.

Cookies Policy　|　Privacy Policy

PMG RMS
PMG Recruitment Management System

PLANATE
MANAGEMENT GROUP
CORNERSTONE FOR SERVICE, INTEGRITY, AND INNOVATION

Log in

User Email　　　👤

Password　　　🔒

SIGN IN

Log In with Planate Account

Having trouble logging in? Please contact **DevOps Team** for assistance.
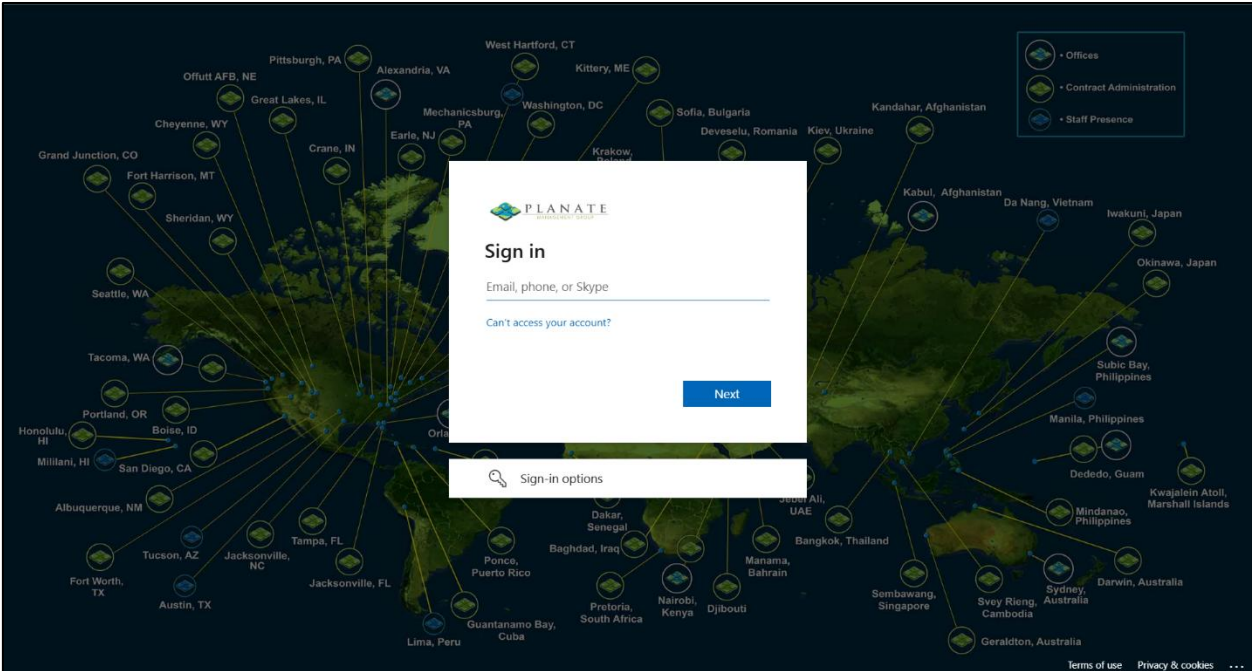
Figure 1. Sign-in Page

2.1.3 Upon successful logging in, you will be redirected to the home page.

2.2 PMGRMS User Types

There are different groups of users who can access PMGRMS. Before any user can enter the system, they must first login using their Office 365 accounts.

USER TYPE	DESCRIPTION
Requestor	This role is responsible for initiating and submitting new Personnel Requisition Forms (PRFs), ensuring that staffing requests are properly documented and processed in accordance with company procedures.
HR Assessor	This role is responsible for evaluating Personnel Requisition Forms (PRFs) by assessing the pay band, pay group, and market comparator to ensure alignment with company compensation structures and industry standards before proceeding to the next stage of approval.
Workforce Analyst	This role is responsible for reviewing Personnel Requisition Forms (PRFs) to assess staffing needs, workforce distribution, and alignment with organizational goals. Based on the evaluation, the Workforce Analyst determines whether the requisition is recommended for approval or not, ensuring it aligns with workforce planning and budget considerations.

Approvers	This role is responsible for reviewing and making final decisions on Personnel Requisition Forms (PRFs). Approvers assess the justification, budget availability, and alignment with organizational goals before granting approval or rejecting the request. Their decision ensures that hiring aligns with company policies and strategic workforce planning.
HR Recruitment	This role is responsible for assigning approved Personnel Requisition Forms (PRFs) to the appropriate recruiter or hiring team. HR Recruitment ensures that requisitions are properly distributed based on job requirements, urgency, and recruiter specialization, facilitating an efficient and streamlined hiring process.
Admin	This role is responsible for overseeing system configurations, user access, and overall management of the Personnel Requisition Form (PRF) process. Admin ensures compliance with company policies, maintains data integrity, and provides support to users by troubleshooting issues and optimizing workflow efficiency.

2.3 PMGRMS Interface

2.3.1 Admin Dashboard

The **Admin Dashboard** serves as a powerful tool for decision-making and performance monitoring, allowing users to quickly assess trends, identify areas for improvement, and make informed decisions based on real-time data.

Upon logging into PMGRMS, users are first directed to the dashboard, which provides visual insights into key metrics.
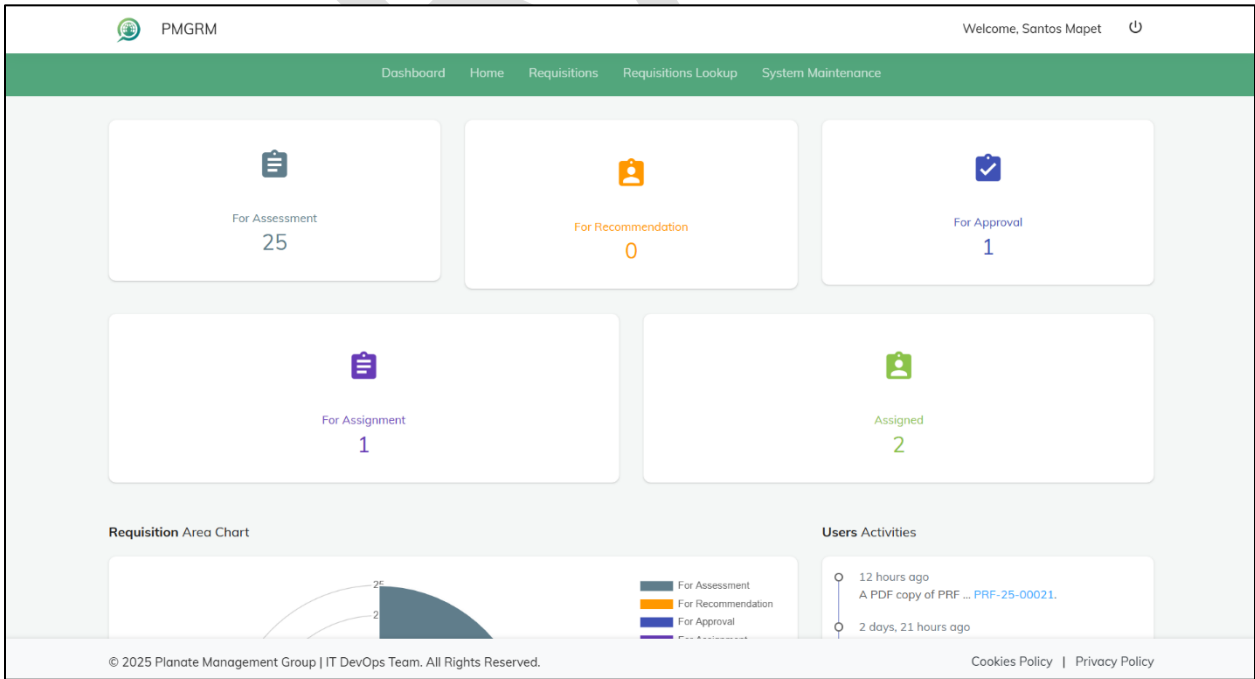
Figure 2. Admin Dashboard

2.3.2 Home Page

Upon logging into PMGRMS, users are first directed to the dashboard, which provides visual insights into key metrics.
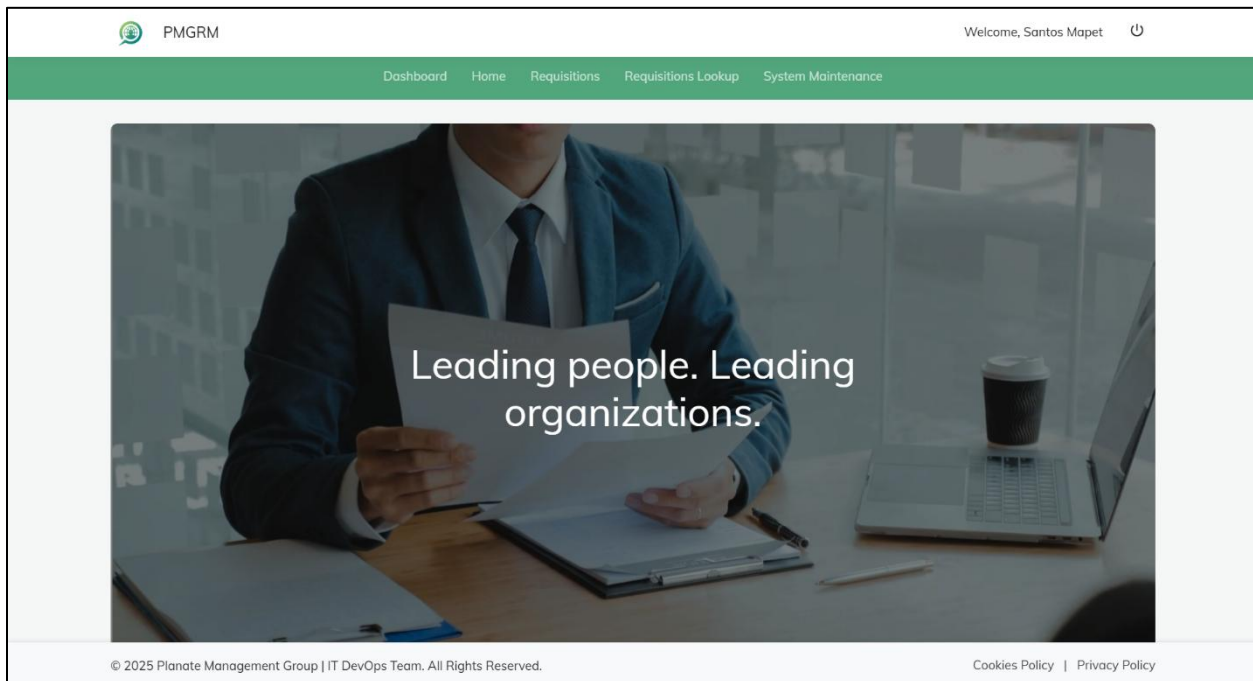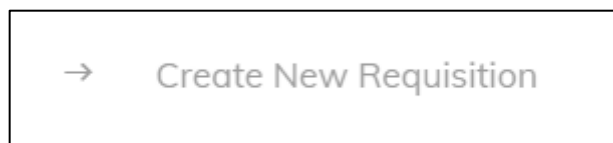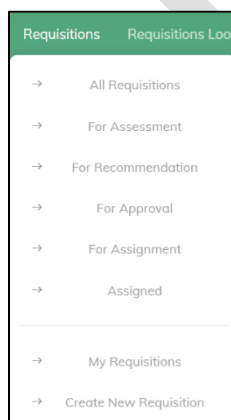

Figure 3. Home Page

2.3.3 Create/Add Personnel Requisition Form

1. **Accessing the Requisition Form**
   1.1 Navigate to the **Requisitions** tab in the navigation bar.
   1.2 Hover over it to display the dropdown menu.
   1.3 Click on **Create New Requisition** to open the requisition creation form.

2. **Filling Out the Requisition Form**
   2.1 **Acknowledged Direction:** Check this box to confirm that the requisition aligns with company guidelines and has been reviewed for compliance with organizational policies.
   2.2 **Requisition Type:** Select the appropriate type of requisition:
       2.2.1   **Billable** – For project-related expenses and planned headcount. These positions are directly tied to a specific project budget.
       2.2.2   **Non-Billable/Indirect/Overhead** – For unplanned overhead expenses, including support roles, administrative staff, or other non-revenue-generating positions.
   2.3 **Justification:** Provide a clear and detailed explanation for the requisition request. The justification should include:
       2.3.1   The reason for the request (e.g., new role, replacement, or expansion).
       2.3.2   The impact on the project or department if the position is not filled.
       2.3.3   Any supporting details that validate the necessity of the role. *(This field is mandatory.)*
   2.4 **Entity:** Select the entity under which the requisition falls. Choosing the correct entity ensures proper budget allocation and approval routing. Options include multiple Planate Management Group divisions and subsidiaries
   2.5 **Summary Requirements:** Ensure all fields are completed correctly for immediate action.
       2.5.1   **Position Title:** Enter the job title of the requested position. *(Required)*
       2.5.2   **Project Name:** Specify the associated project, if applicable.
       2.5.3   **Immediate Supervisor:** Select the supervisor responsible for overseeing the position. *(Required)*
       2.5.4   **Headcount Requirement:** Indicate the number of positions being requested. *(Required)*
       2.5.5   **Job Location:** Enter the location where the employee will be based. *(Required)*
       2.5.6   **Required Start Date:** Specify the desired start date. *(Required)*
       2.5.7   **Duration of Project/Contract:** Indicate the expected duration of employment, if applicable.
       2.5.8   **Project Notification/Awarded Date:** Enter the date the project was awarded, if relevant.
   2.6 **Assigning Project Codes:**
       2.6.1   **Unanet Project Codes:** Select the relevant project codes for budget tracking. *(Required)*
       2.6.2   Click **"Add Code"** to include multiple project codes if necessary.
       2.6.3   Click **"Remove Last Code"** to delete the most recent entry.
   2.7 **Position Details:**
       2.7.1   **Personnel Action Requested:**
           2.7.1.1 **New** – Requesting a new hire.
           2.7.1.2 **Replacement** – Enter the name of the staff being replaced and the reason.
           2.7.1.3 **Change of Contract Status** – Select the transition (e.g., from temporary to full-time).

2.8 **Work Arrangements:**
    2.8.1   **Work Schedule:** Define the expected working hours (e.g., 9 AM - 5 PM). *(Required)*
    2.8.2   **Work Arrangement:** Select one of the following options: *(Required)*
        2.8.2.1 **Virtual/Remote**
        2.8.2.2 **Planate Office-based**
        2.8.2.3 **Client Site**

2.9 **Experience and Job Classification:**
    2.9.1   **Years of Experience:** Select the required experience level for the role. *(Required)*
    2.9.2   **Job Level:** Choose between Junior, Middle, or Senior roles. *(Required)*
    2.9.3   **Job Group:** Select the appropriate job classification:
        2.9.3.1 **Support Group**
        2.9.3.2 **Professional/Technical**

PMGRM

Welcome, Tapado Gemma

Home   Requisitions

Create Requisition

Requisition Information	Summary Requirements	New Hire Checklist

◉ Billable   ○ Non-Billable/Indirect/Overhead

(project-related expense & planned headcount)   (unplanned overhead expense)

Justification

Please enter justification...

Entity

◉ Planate Management Group LLC

○ Planate Federal Services LLC

○ Planate Management South East Asia Corp.

Create Requisition

Requisition Information	Summary Requirements	New Hire Checklist

Summary of Requirements:

(Ensure all fields are completed correctly for immediate action)

Position Title: *

Account MAnager

Headcount Requirement: *

Enter Headcount Requirement

Project Name:

Enter Project Name

Required Start Date: *

dd/mm/yyyy

Immediate Supervisor: *

-- Please select --

Duration of Project/Contract:

Enter Duration of Project/Contract

Job Location: *

Enter Job Location

Project Notification/Awarded Date:

dd/mm/yyyy

Unanet Project Codes/s: *

Project codes will be shown here

Create Requisition

Requisition Information	Summary Requirements	New Hire Checklist

Description	Required?	Remarks
With Access to Controlled Unclassified Information	☐	Enter remarks
Specific software/system for the position *Please specify under remarks*	☐	Enter remarks
Mobile Phone	☐	Enter remarks
WiFi/Hotspot	☑	Enter remarks
Computer (Laptop/Desktop)	☑	Enter remarks
Monitor (24 or 27 inches)	☑	Enter remarks
Headset	☑	Enter remarks
Keyboard	☑	Enter remarks
	☑	

Figure 4. Requisition Form Tabs

Note: All required fields (*) must be completed to proceed to the next tab.
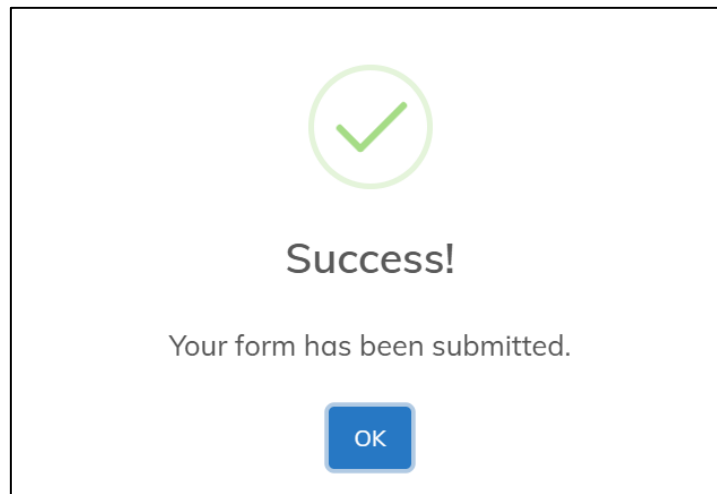
Figure 5: Personnel Requisition Form (PRF) Successfully Created Notification

3. **List of Requisition**

Find the requisition you'd like to view on the **All Requisition, My Requisition, For Assessment, For Recommendation, For Approval, For Assignment, Assigned** page that contains the list of requisition.

- View the desired requisition and use the **Previous** and **Next record** to view other requisition in the table.
- Edit the record by clicking the **record** in the table.

Figure 6: All Requisition List

Home   Requisitions

List of **Requisition**

Show 10 ⌄ entries   Search:

PRF #	Job Title	Requested By	Currently In Charge	Date Requested	Date Required	Status
PRF-25-00015	Web Developer	Shaira Batalla	Miroa Ramirez	March 14, 2025, 2:27 a.m.	2025-03-22	FOR ASSESSMENT
PRF-25-00014	Solution Architech	Gemma Tapado	Miroa Ramirez	March 12, 2025, 5:26 a.m.	2025-03-13	FOR ASSESSMENT
PRF-25-00007	Azure DevOps Engineer	John Errol Caras	Miroa Ramirez	March 11, 2025, 2:52 p.m.	2025-03-29	FOR ASSESSMENT
PRF-25-00004	Marketing Expert	John Michael Keaton Aguilar	Miroa Ramirez	March 6, 2025, 4 a.m.	2025-03-14	FOR ASSESSMENT
PRF-25-00003	Accounting Officer	John Michael Keaton Aguilar	Miroa Ramirez	March 6, 2025, 3:24 a.m.	2025-03-14	FOR ASSESSMENT

Showing 1 to 5 of 5 entries   1

Figure 7: For Assessment List

Home   Requisitions

List of **Requisition**

Show 10 ⌄ entries   Search:

PRF #	Job Title	Requested By	Currently In Charge	Date Requested	Date Required	Status
PRF-25-00002	Jr. Software Engineer	John Errol Caras	Workforce Analyst	March 5, 2025, 3:51 p.m.	2025-04-01	FOR RECOMMENDATION

Showing 1 to 1 of 1 entries   1

Figure 8: For Recommendation List

Home   Requisitions

List of **Requisition**

Show 10 entries   Search:

PRF #	Job Title	Requested By	Currently In Charge	Date Requested	Date Required	Status
PRF-25-00012	Contract Administrator	Joshua Korir	Alla Kovalova Mercy Ndirangu Hashim Paiman	March 12, 2025, 12:41 a.m.	2025-03-31	FOR APPROVAL

Showing 1 to 1 of 1 entries   1
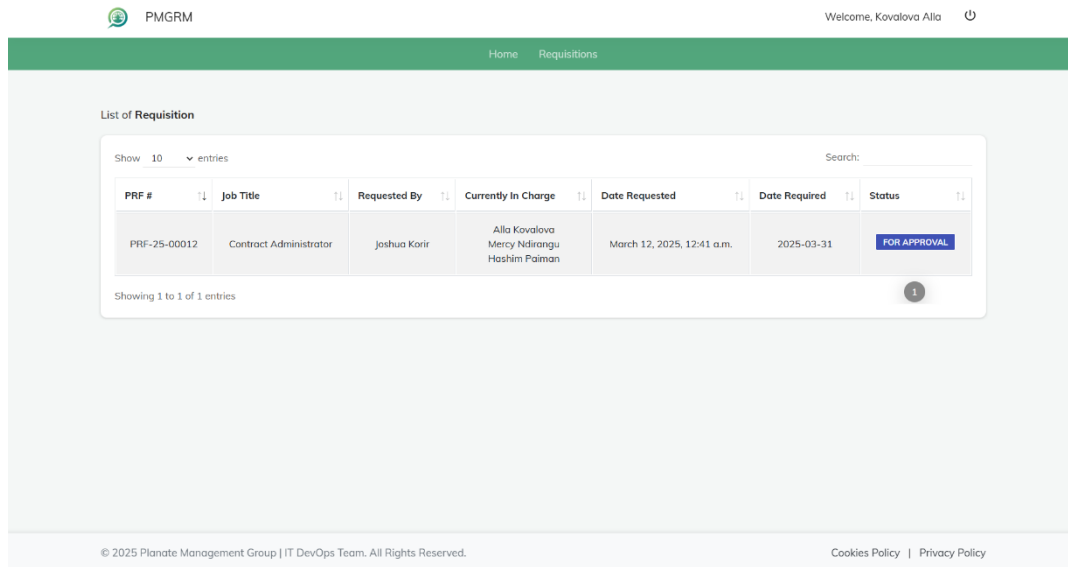
Figure 9: For Approval List

Home   Requisitions

List of **Requisition**

Show 10 entries   Search:

PRF #	Job Title	Requested By	Currently In Charge	Date Requested	Date Required	Status
PRF-25-00013	Senior Civil Engineer	Hazel Gichung'wa	HR Recruitment	March 12, 2025, 12:56 a.m.	2025-04-15	FOR ASSIGNMENT

Showing 1 to 1 of 1 entries   1
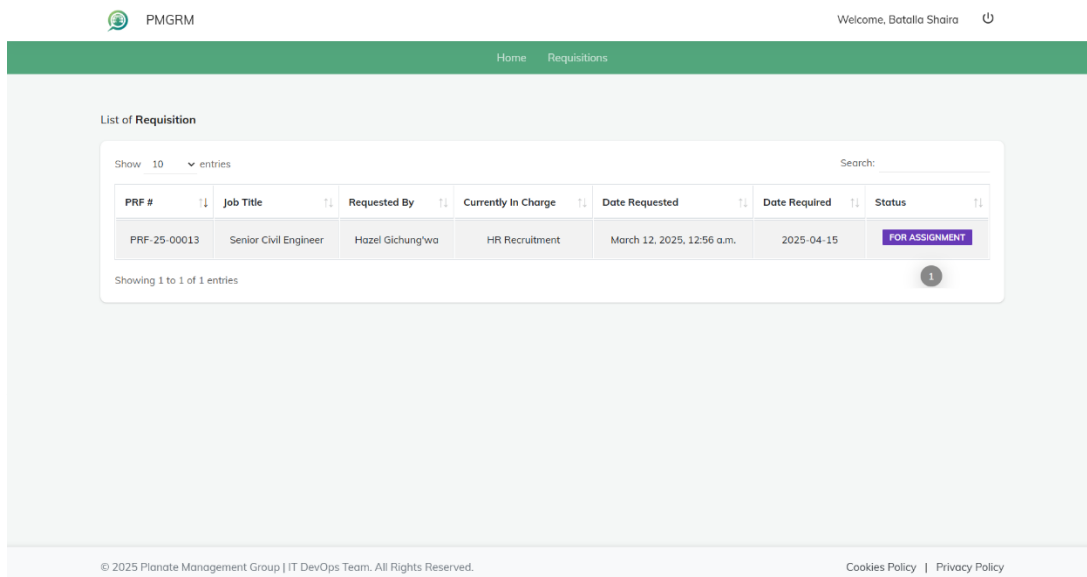
Figure 10: For Assignment List

List of **Requisition**

Show 10 ∨ entries   Search:

PRF #	Job Title	Requested By	Currently In Charge	Date Requested	Date Required	Status
PRF-25-00011	Financial Analyst	Lilly Ngetich	Lilly Ngetich	March 11, 2025, 3:52 p.m.	2025-03-24	ASSIGNED
PRF-25-00009	Web Developer	Edito Perito	Edito Perito	March 11, 2025, 3:08 p.m.	2025-03-24	ASSIGNED
PRF-25-00006	Project Assistant	Anis Angkhanwan	John Errol Caras	March 11, 2025, 2:49 p.m.	2025-03-24	ASSIGNED
PRF-25-00005	Accountant	Mark Labucca	Mapet Santos	March 6, 2025, 2:53 p.m.	2025-03-10	ASSIGNED

Showing 1 to 4 of 4 entries   1

Figure 11: Assigned List

List of **Requisition**

Show 10 ∨ entries   Search:

PRF #	Job Title	Requested By	Currently In Charge	Date Requested	Date Required	Status
PRF-25-00015	Web Developer	Shaira Batalla	Miroa Ramirez	March 14, 2025, 2:27 a.m.	2025-03-22	FOR ASSESSMENT

Showing 1 to 1 of 1 entries   1

Figure 12: My Requisition

4. Requisition Information

4.1 Requisition Information Tab

This tab includes all requisition details, from the expense type to the job group.

Figure 13: Requisition Information Tab

4.2 New Hire Checklist Tab

This tab contains a list of items required for the requisition, to ensure all necessary checks are completed.

Figure 14: New Hire Checklist Tab

4.3 Assessment Tab

This tab contains the requisition assessment, which will be conducted by the HR Assessor and Workforce Analyst. If you are not one of these roles, you will only have view access to the assessment.

Figure 15: Assessment Tab (Requestor View)

Figure 16: Assessment Tab (HR Assessor View)

Figure 17: Assessment Tab (Work Force Analyst View)

4.4 Attachment(s) Tab

This tab contains all attachments uploaded by the requestor, including the resume, Statement of Work (SOW), and Position Description (PD).

Figure 18: Attachment(s) Tab

4.5 Attachment(s) Tab

This tab contains all attachments uploaded by the requestor, including the resume, Statement of Work (SOW), and Position Description (PD).
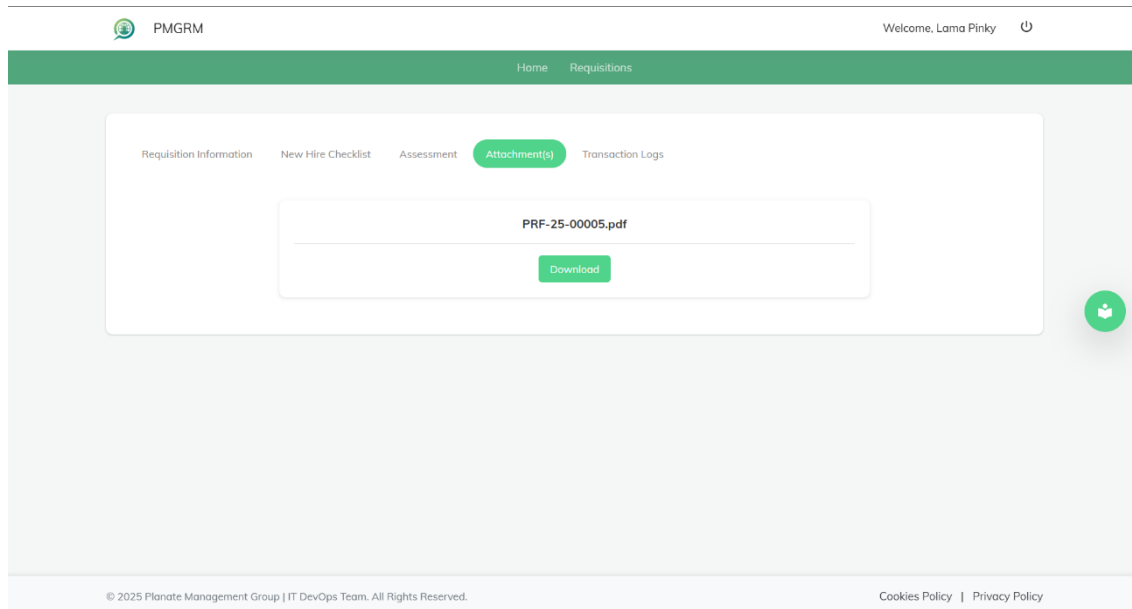
Figure 18: Attachment(s) Tab

4.6 Transaction Logs

This tab contains a record of all transactions created within the requisition.
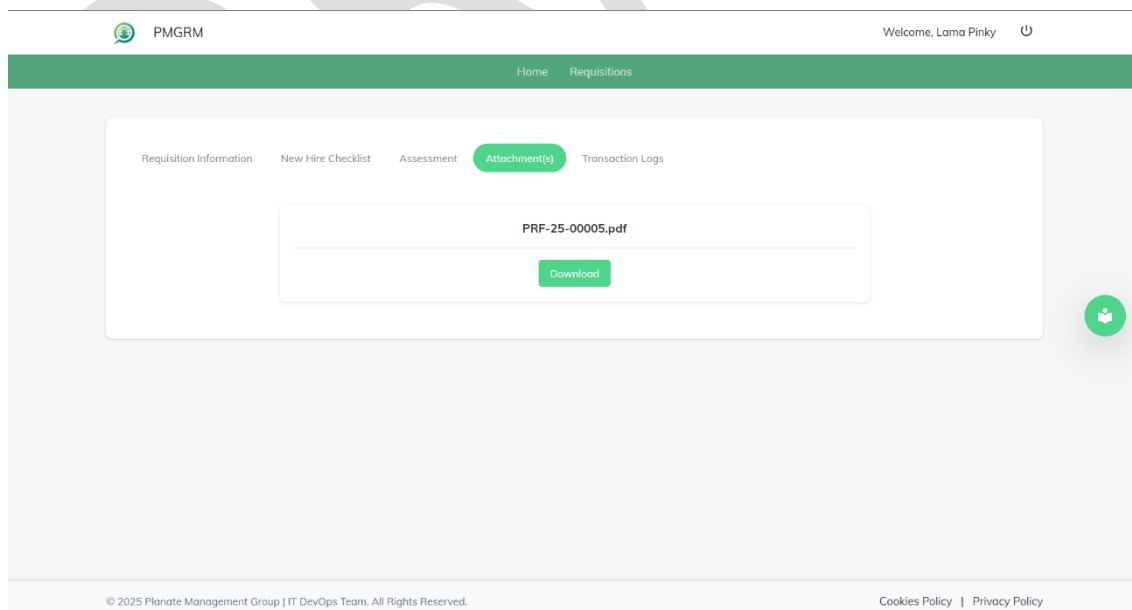
Figure 18: Transaction Logs Tab

4.7 Requisition Trail

The Requisition Trail provides a detailed record of the requisition's progress. It consists of two main sections: the **Process Flow** and the **Approval Flow**. The **Process Flow** includes key stages such as Assessment, Recommendation, Approval, and HR Recruitment. The **Approval Flow** outlines the names of all approvers involved and their corresponding approval statuses, ensuring a comprehensive overview of the requisition's approval process.

Figure 19: Requisition Trail

5. Requisition Trail Options

Each user role is assigned specific options and permissions when viewing the requisition trail, ensuring that access and visibility are tailored to their responsibilities.

5.1 Requisition Trail (Requestor, HR Assessor, Workforce Analyst)

The requisition trail for the Requestor, HR Assessor, and Workforce Analyst is available for viewing purposes only, allowing them to check the status and progress of the requisition.
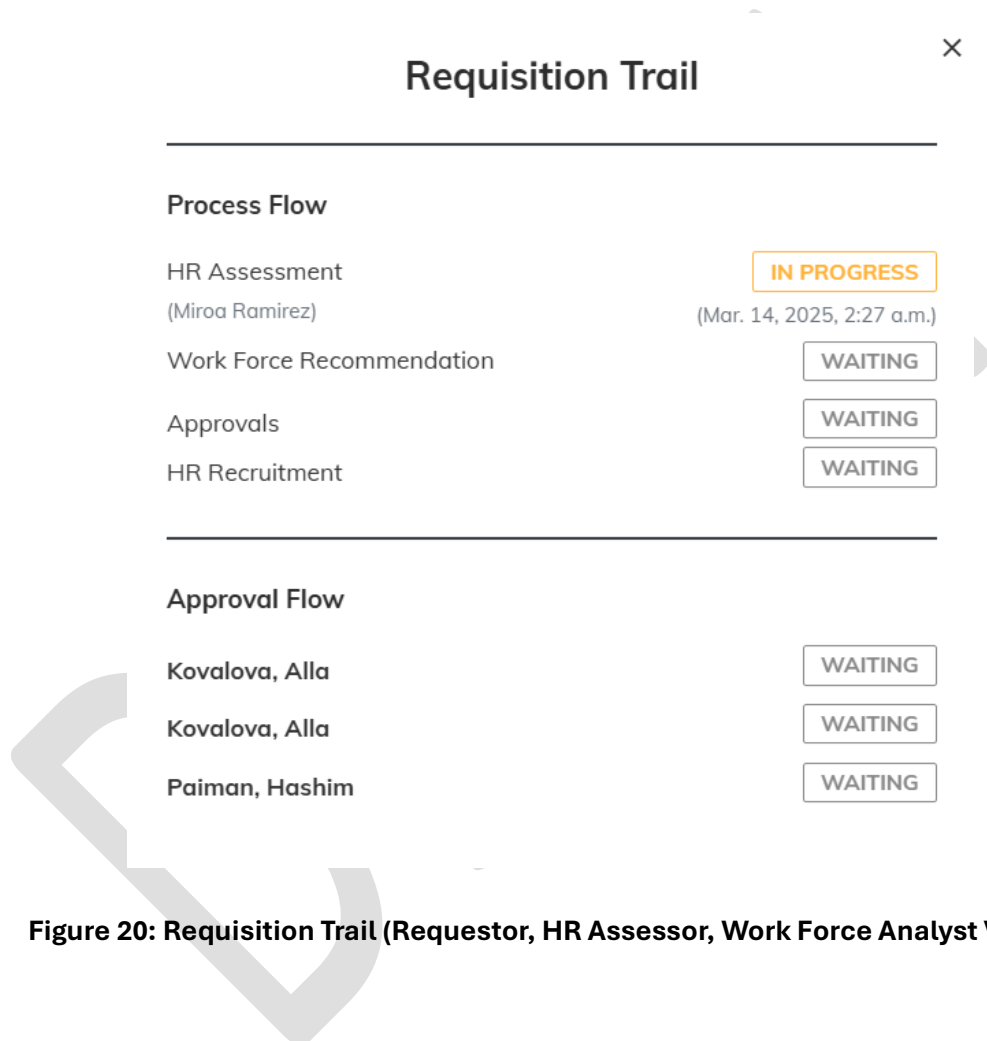

Figure 20: Requisition Trail (Requestor, HR Assessor, Work Force Analyst View)

5.2 Requisition Trail (Approver)

For approvers, the requisition trail includes a **Decision** button, which becomes available when it is their turn to review the requisition. Upon clicking this button, a modal will appear, allowing the approver to take action. The available options include:

- **Acknowledge Direction** – Confirm receipt and understanding of the requisition.

- **Approve** – Grant approval for the requisition to proceed to the next stage.

- **Decline** – Reject the requisition with a reason for non-approval.

These options ensure a structured and transparent approval process within the requisition workflow.

Figure 21: Requisition Trail and Decision Modal of Approvers

5.2 Requisition Trail (HR Recruitment)

The HR Recruitment Trail offers two options, depending on the status of the requisition:

1. **For Assignment** – If the requisition status is "For Assignment," an **Assign** button will be available. Clicking this button opens a modal that allows the user to assign a specific individual to the requisition.

2. **Assigned** – If the requisition status is "Assigned," the interface will display a **Generate PDF** button. This button allows the user to create a PDF version of the Personnel Requisition Form (PRF).

Figure 22: Requisition Trail and Assign Modal of HR Recruitment with For Assignment Status

Requisition Trail ✕

Process Flow

HR Assessment **APPROVED**
(Miroa Ramirez) (Mar. 11, 2025, 3:58 p.m.)

Work Force Recommendation **APPROVED**
(Pinky Lama) (Mar. 11, 2025, 4:05 p.m.)

Approvals **APPROVED**

HR Recruitment **APPROVED**

Approval Flow

Orcales, Caryll **APPROVED**
(Mar. 11, 2025, 4:12 p.m.)

Ndirangu, Mercy **APPROVED**
(Mar. 11, 2025, 5:06 p.m.)

Paiman, Hashim **ACKNOWLEDGED DIRECTION**
(Mar. 11, 2025, 9:56 p.m.)

Generate PDF

Figure 23: Requisition Trail and Generate PDF Button of HR Recruitment with Assigned Status

Figure 24: Generated PDF of Assigned Status Requisition