RecruitLite AI

User Manual

Version 1.1 · October 2026

Full-Lifecycle AI-Assisted Recruitment Platform

Self-hosted · One Company Per Install

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1. Introduction

RecruitLite AI is a full-lifecycle recruitment platform covering candidate intake, AI-assisted resume parsing, explainable AI candidate-to-position matching, interview scheduling, offer management, and hiring analytics - all in one connected system that your company installs and fully owns.

Unlike shared multi-tenant cloud recruiting tools, RecruitLite AI is installed once per company, on your own server. Your candidate and hiring data is never stored in a database shared with any other business.

What makes RecruitLite AI different

- **You own your data.** One company per install; nothing is shared across businesses.
- **AI that explains itself.** Match scores come from a transparent, configurable weighted formula your own Admin can see and adjust - never a black-box ranking.
- **No per-resume AI toll.** Candidate-position matching runs on local AI models on your own server. A third-party AI (OpenAI, or your own Ollama server) is used for Job Description generation, candidate summaries, offer email drafts, and resume data extraction - configurable per company under Settings → AI Provider.
- **One system, not five.** Sourcing, parsing, matching, interviewing, offering, and reporting live in one connected platform instead of stitched-together point tools.

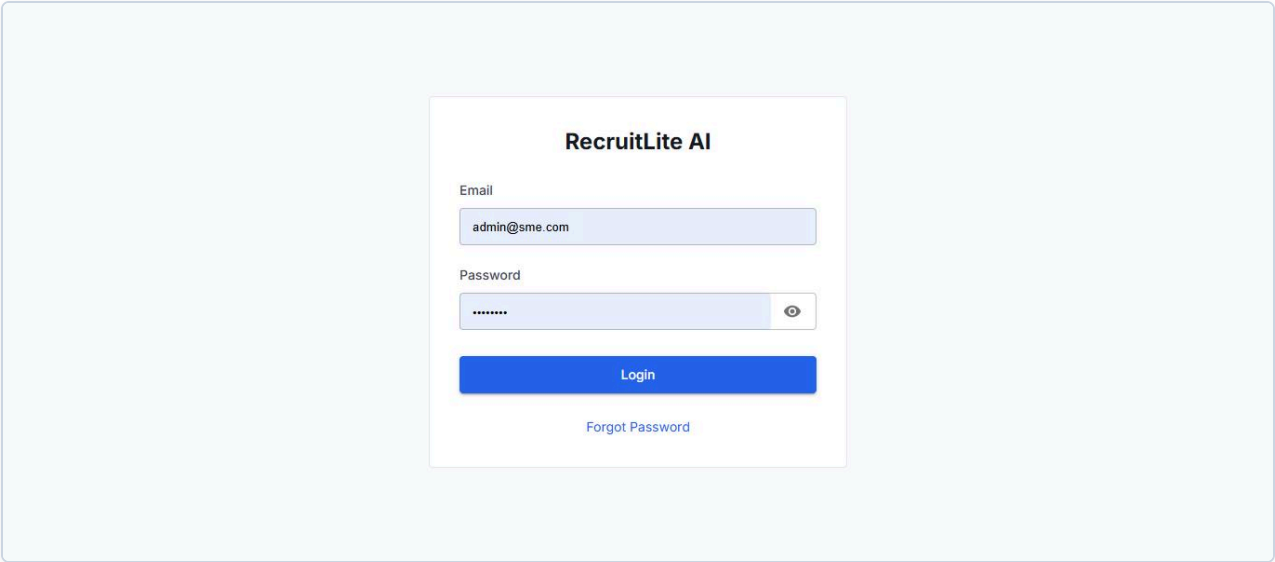
> This manual is written for everyday users of an already-installed system: Recruiters, Hiring Managers, Approvers, Interview Finalisers, and Company Admins. If you still need to install RecruitLite AI or check whether your server meets the minimum specifications, see the separate *Installation & Minimum System Requirements Guide*.

2. Getting Started

2.1 Logging in

Open the address your Company Admin gave you (for example `http://localhost` on the install machine itself, or `http://<server-ip>` for a shared office install) in a web browser. Enter your email and password on the login screen.

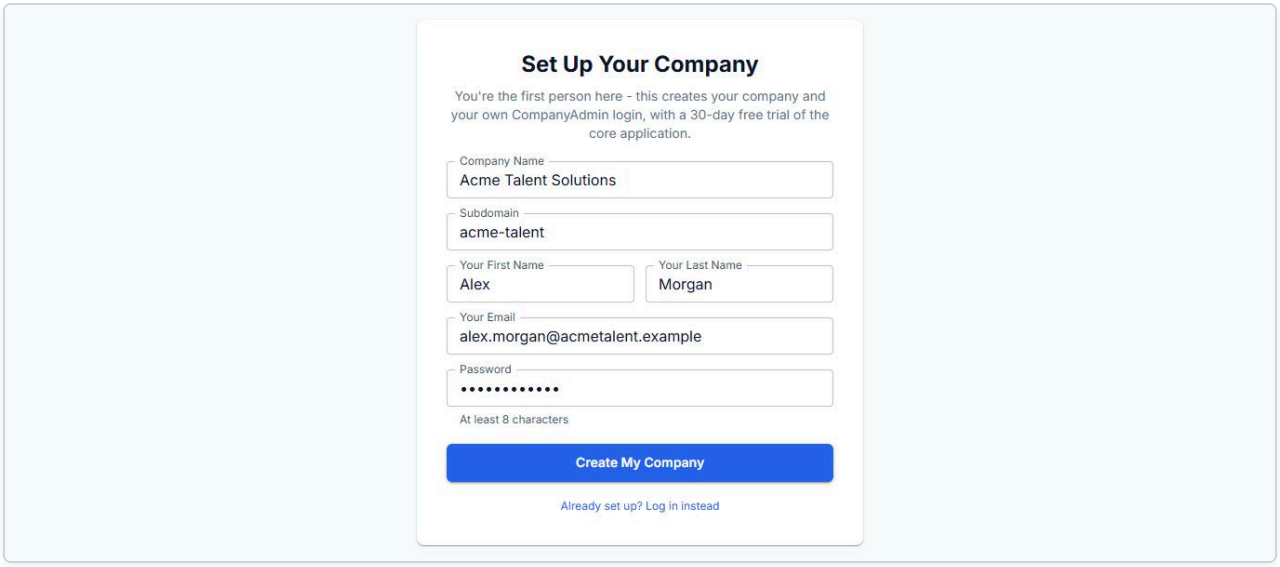
RecruitLite AI uses secure, httpOnly session cookies rather than browser storage, so signing in happens per browser tab/window as issued by the server. Repeated failed login attempts are automatically throttled as a brute-force protection measure.



The login screen.

2.2 First-time company setup (Company Admin only)

The very first action after a fresh install is registering your company. This auto-creates your Company Admin login and starts a 30-day free trial automatically - no sales call required. See Section 17 for licensing details.



Set Up Your Company - the one-time registration screen.

2.3 Forgot your password

Use the "Forgot Password" link on the login screen to request a reset email, or ask your Company Admin to reset it for you from User Management.

2.4 Navigating the app

The main navigation gives access to Dashboard, Candidates, Positions, Reports, and Administration, scoped to what your role is permitted to see (Section 3). An AI Assistant is available throughout the app (Section 13).

3. Roles & Permissions

Every user is assigned one or more roles. Most staff-level roles can be combined on one person (for example, a small team's one recruiter can also be Hiring Manager and Approver). The two admin-tier roles are exclusive and cannot be combined with any other role.

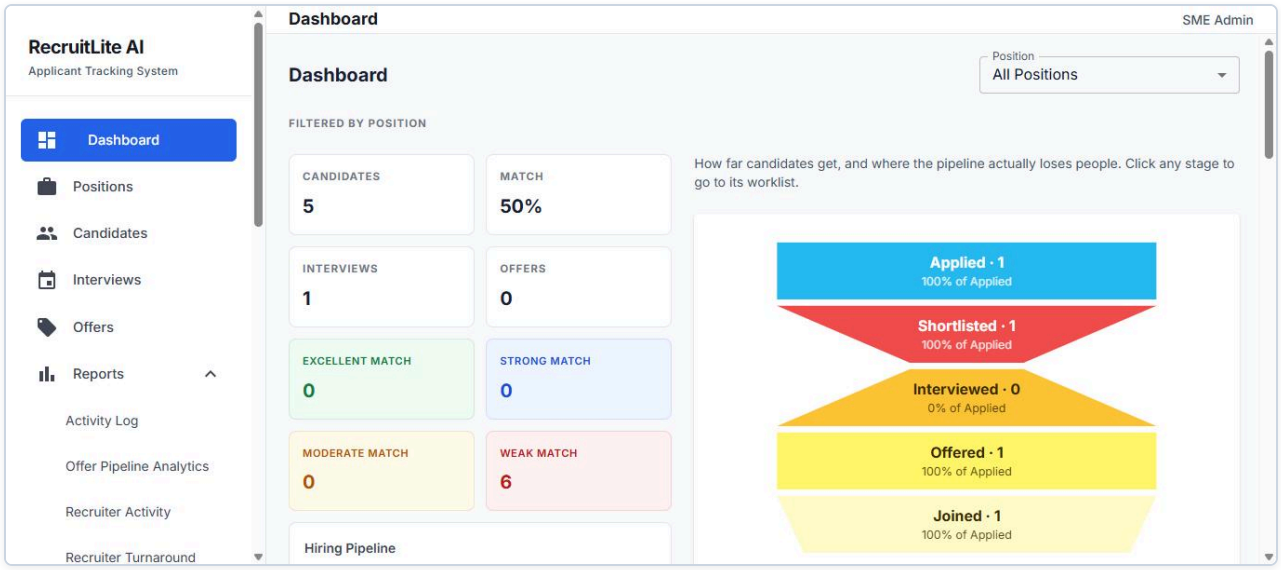
Role	Who it's for	What it can do
Company Admin	Your organization's system owner	Full access to every screen for your company: Users, Settings, Field Policy, Catalogs, Departments/Locations, Backup & Restore, Licensing. Cannot be combined with any other role.
Recruiter	Day-to-day hiring staff	Create and manage candidates and positions, run matching, schedule interviews, manage offers, view reports.
Hiring Manager	The manager who owns a requisition	Full Recruiter-equivalent access, scoped to candidates tied to positions/interviews they are assigned to.
Approver	Governance gate for requisitions and offers	Everything a Recruiter can do, plus the authority to approve a Draft position into Open (or send it back to Draft with a reason) and to approve offers before they are sent.
Interview Finaliser	Records the final hiring decision	Row-scoped to candidates who have reached the offer stage; records the final agreed offer terms and outcome, and is the one role that can see compensation figures directly in the app.
Platform Admin	RecruitLite AI vendor-level access	Cross-install administrative access used for license issuance and support; not a normal end-user role.

Interviewer is not a separate RBAC role - any user can be scheduled as an interviewer on an interview plan. If that person connects their own Google or Outlook calendar (Section 10.3), their real availability shows up automatically when scheduling.

4. Dashboard

The Dashboard is a real-time KPI view of your hiring activity, built from charts rather than static tables.

- Match-quality buckets (Excellent, Strong, Moderate, Weak) with live counts - click any number to open the real candidates behind it, already filtered to that score range.
- A live Hiring Funnel showing exactly how far candidates get at every stage - Applied, Shortlisted, Interviewed, Offered, Joined - and where the pipeline actually loses people. Click any stage to jump straight to its worklist. The Joined count reflects candidates who have actually started (Section 11.1) - a candidate who has accepted an offer but not yet started shows separately, under Offer Accepted.
- All figures use comma-delimited formatting for readability (e.g. 1,284 candidates).

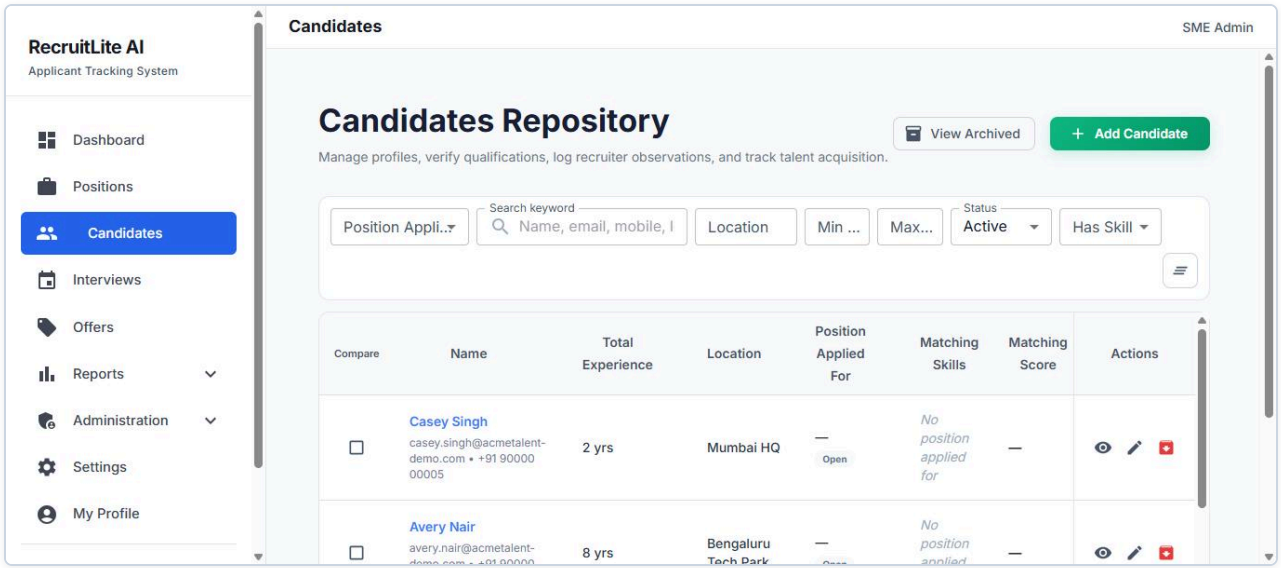


Dashboard with live match-quality buckets and the Hiring Funnel.

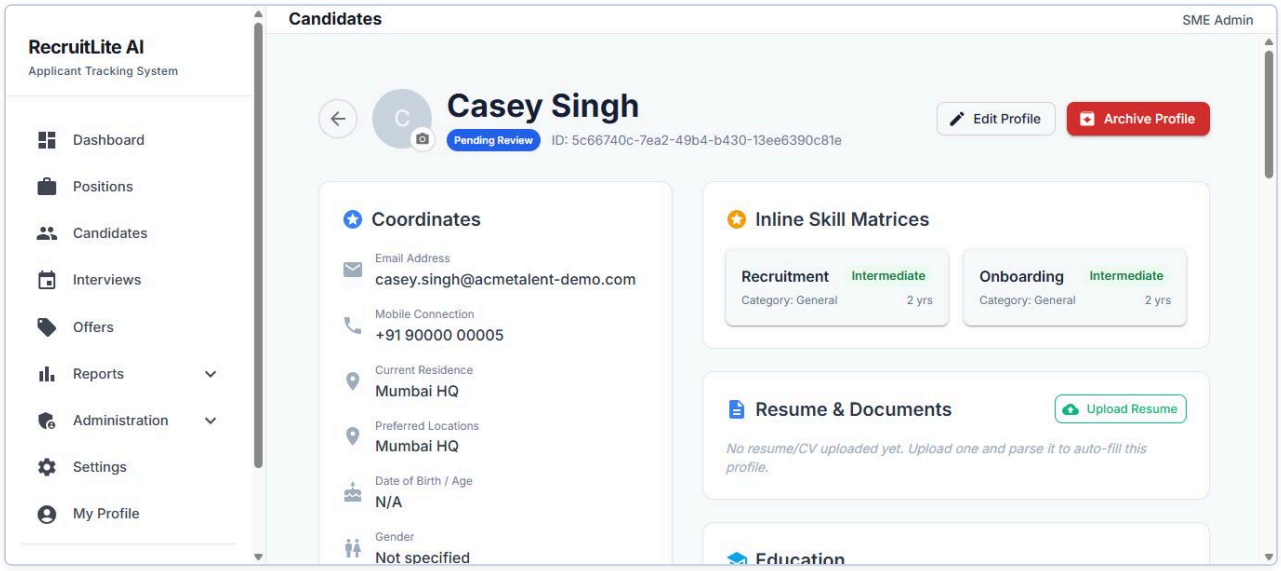
5. Candidate Management

5.1 Candidate profiles

Each candidate has a full profile: resume/document storage, complete work history, education, skills, and certifications, in one place. Adding a candidate manually opens a guided form; uploading a resume (Section 8) pre-fills what it can automatically.



Candidates Repository - search, filter, and compare across your whole pool.



A candidate's profile: coordinates, skill matrix, resume, and education.

5.2 Status-driven pipeline

Every candidate carries a clear, colour-coded status (e.g. Active, On Hold, Panelised, Rejected, Blacklisted, Offer Accepted, Joined, and more) so anyone opening the record can see where that candidate stands at a glance. Status can be changed inline from the candidate list.

- **Rejected** candidates may reapply - a softened duplicate check links the new application back to their existing history instead of creating a duplicate record or losing prior context.
- **Blacklisted** remains a hard block - a blacklisted person's new application is not accepted.
- Candidates who clear a position's score benchmark after being screened out ("Panelised") can automatically resurface on the Matching tab of other open positions.
- **Offer Accepted** and **Joined** are reached only through their own dedicated actions, never by editing the status field directly (Section 11.1) - this keeps the two events (accepting an offer, and actually starting) genuinely distinct and auditable.

5.3 Comparing and finding similar candidates

- **Side-by-side comparison** - select up to 3 shortlisted candidates to compare in one view.
- **"Similar Candidates"** - on any candidate's profile, one click surfaces other candidates with a similar background across your whole pool, powered by AI similarity matching.

5.4 Archiving and deleting

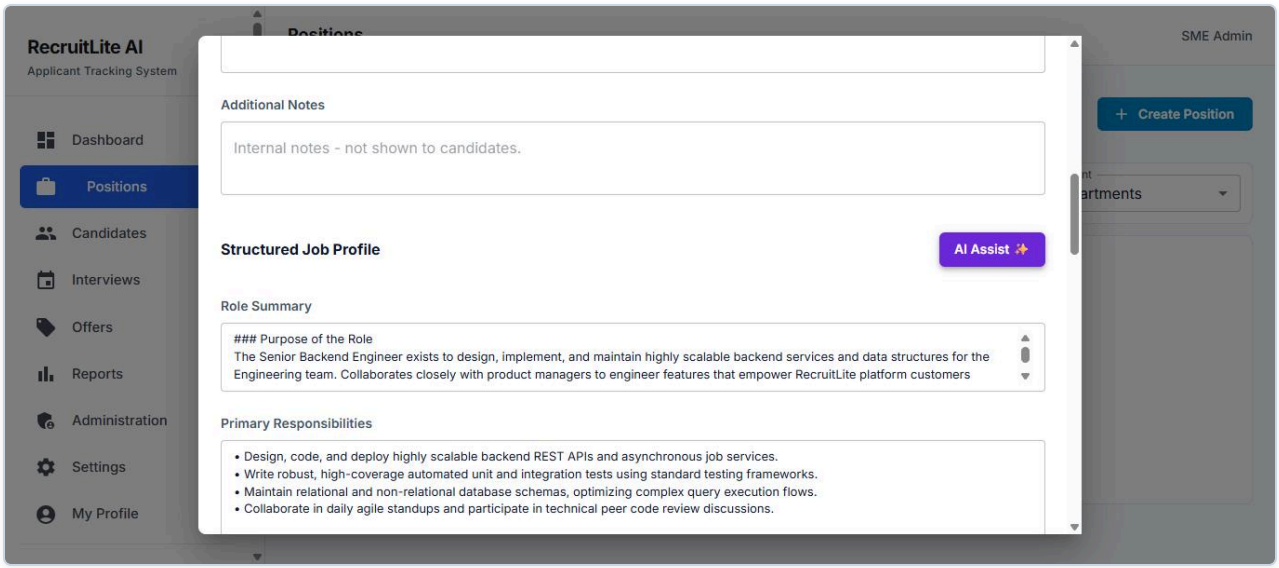
Admins can archive a candidate (fully reversible) or permanently delete a record. Permanent deletion is Admin-only and requires typing the candidate's exact name to confirm before anything irreversible happens; it also removes their stored resume files from disk.

5.5 Search

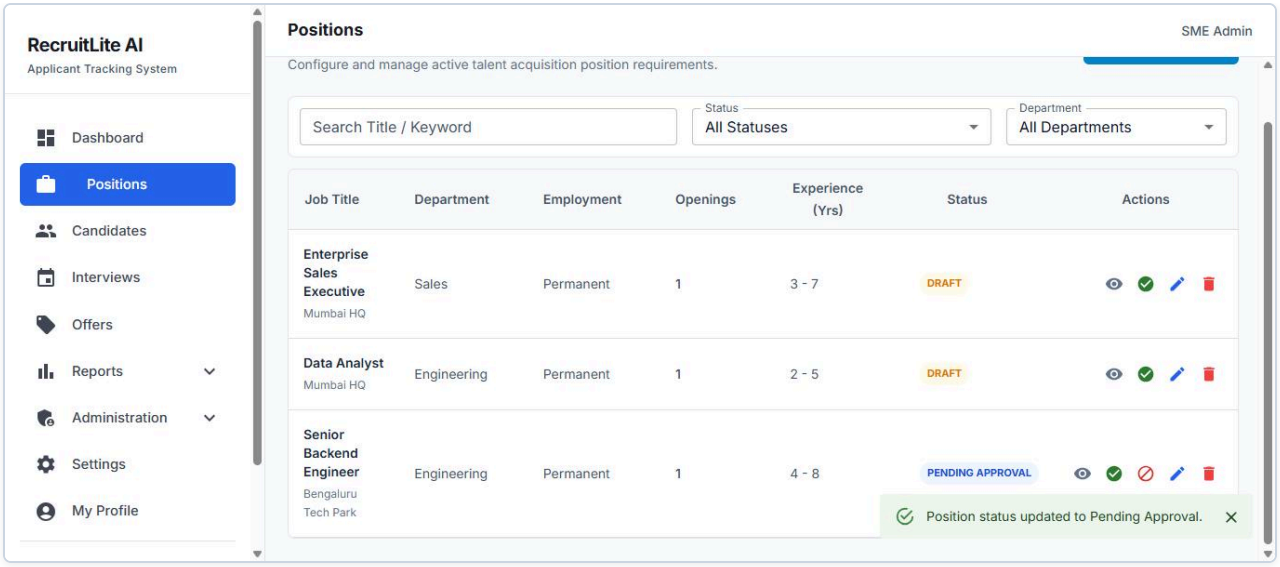
A fast, full-text search covers the entire candidate database, not just the currently loaded page.

6. Position & Requisition Management

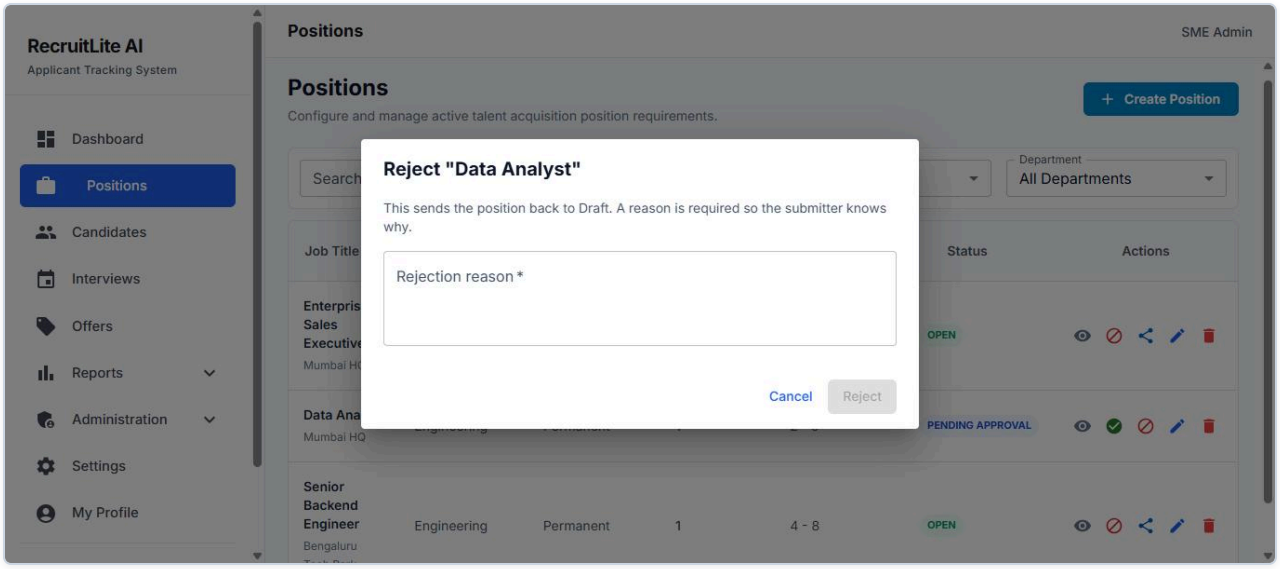
- **Approval workflow** - positions move Draft → Pending Approval → Open. An Approver can approve a pending position or send it back to Draft with a required reason.
- **AI Assist for job descriptions** - one click generates a complete job description, role summary, responsibilities, qualifications, and skills profile in one operation.
- **Duplicate-position protection** - the system warns and blocks creation when a matching position already exists, so duplicate requisitions never reach candidates.
- **Full-text search** across every position, open or closed.
- **Role-based visibility** - Hiring Managers, Approvers, and Admins each see the view and actions appropriate to their role.



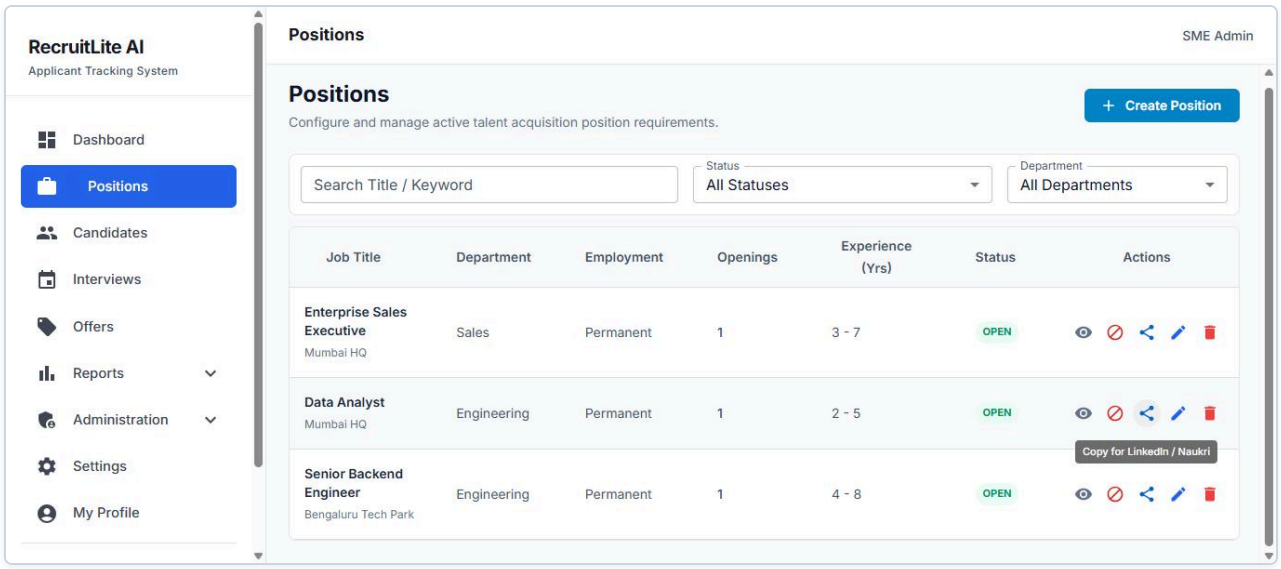
AI Assist generates the full structured job profile in one click.



A position Submitted for Approval, awaiting an Approver's decision.



Rejecting a position sends it back to Draft with a required reason.



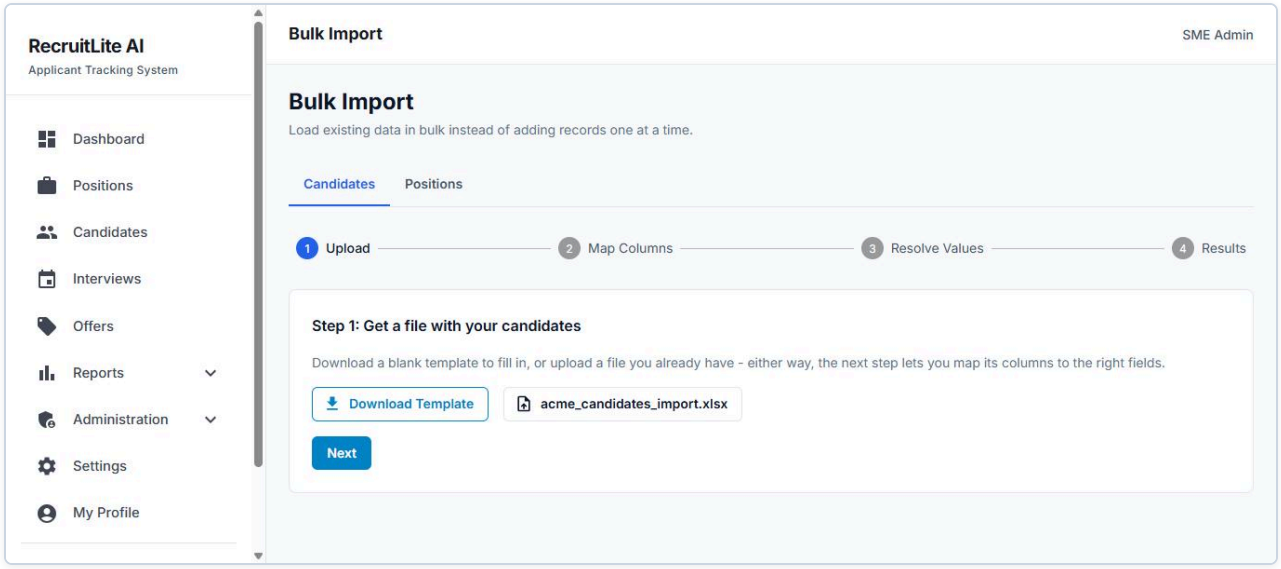
The Positions list, showing department, experience range, and status.

7. Bulk Data Import

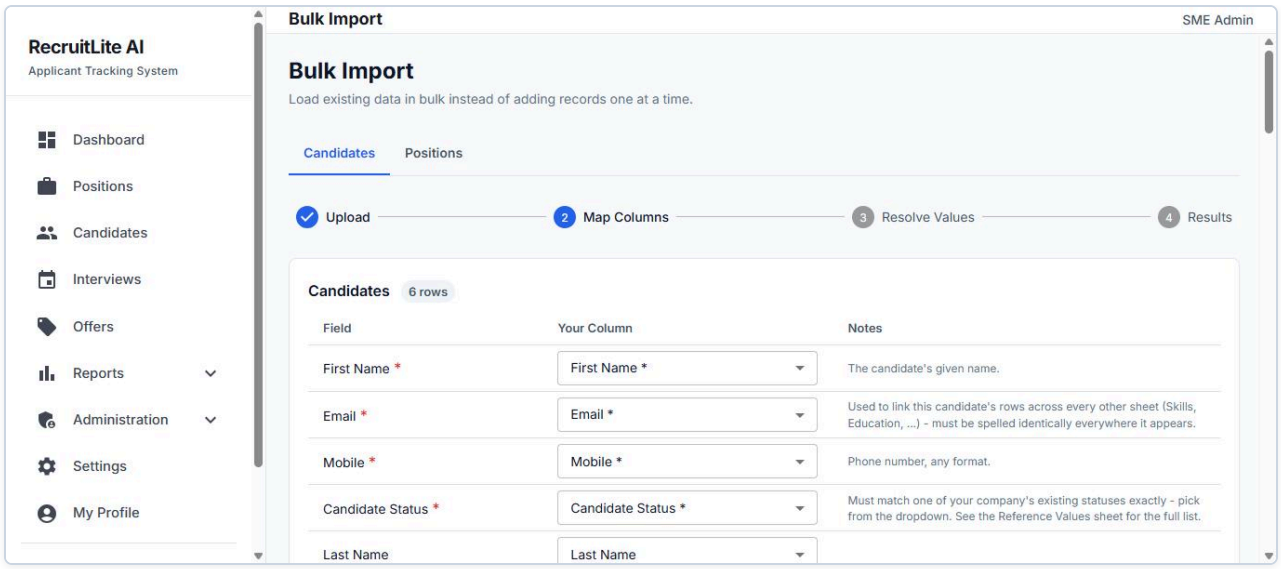
Administration offers one unified import wizard for both Candidates and Positions, using the same proven four-step flow:

1. **Upload** - choose your spreadsheet (a downloadable Excel template matches exactly what the importer expects).
2. **Map Columns** - your spreadsheet's own column headers don't need to match the system's field names; map them visually.
3. **Resolve Values** - fix or confirm any values the system can't automatically match to existing catalogue entries (skills, qualifications, departments, etc.).
4. **Results** - a row-by-row results table shows exactly what was imported versus skipped, including duplicates, so there is never any doubt whether the batch worked.

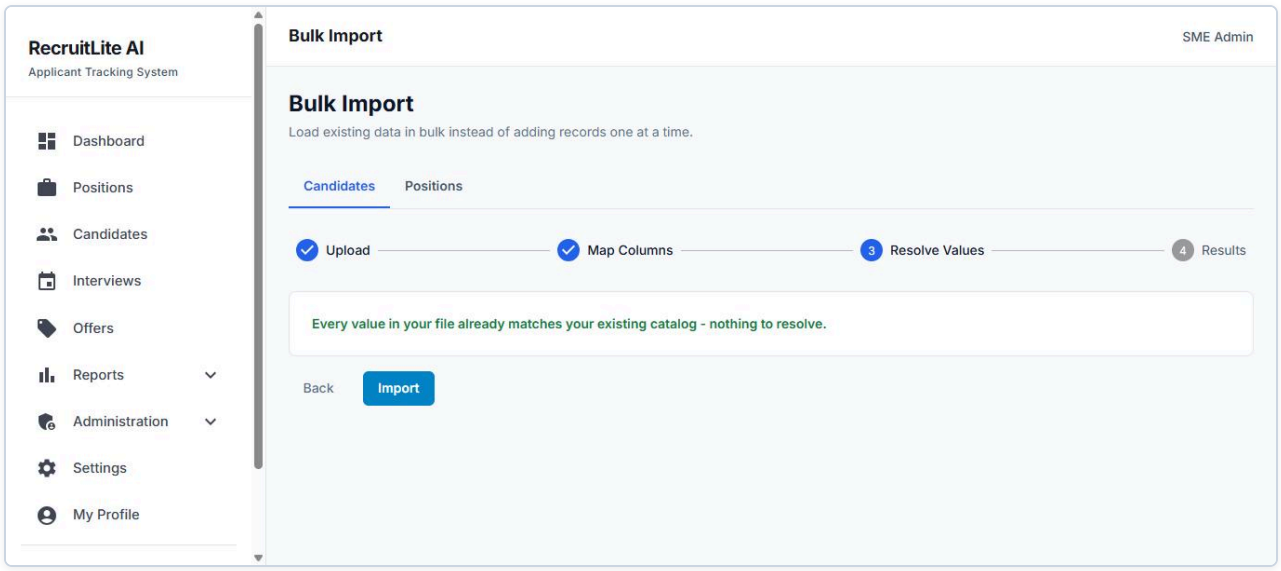
Duplicate rows are detected automatically and skipped with a clear flag in the results - never silently overwritten, and never failing the whole batch.



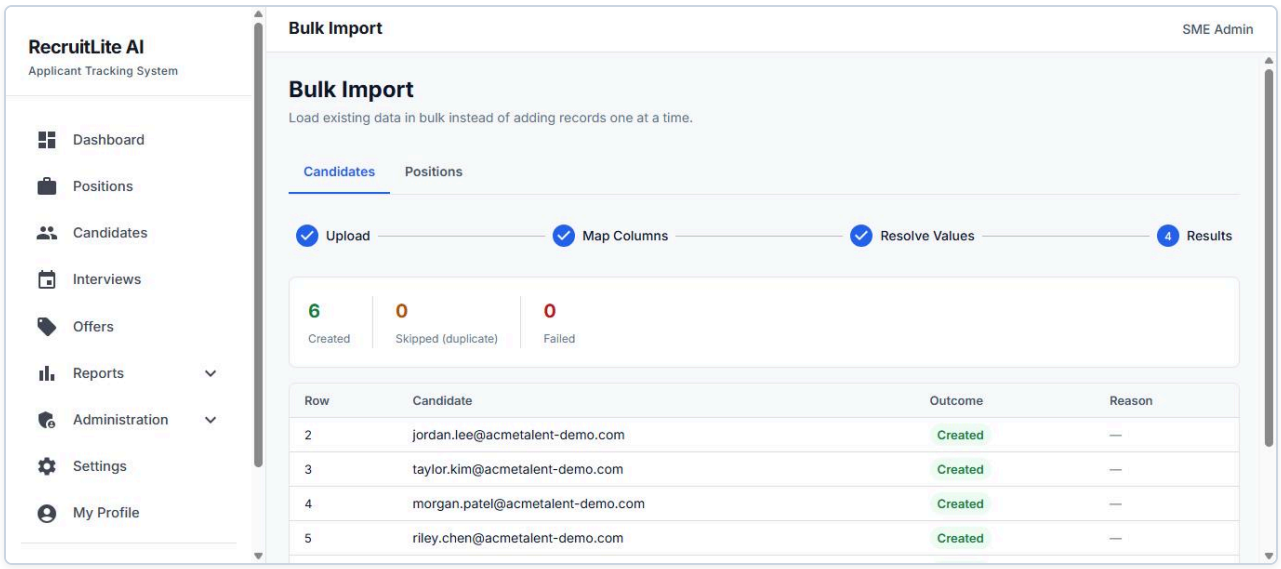
Step 1 - Upload: download the template or choose your own file.



Step 2 - Map Columns: your spreadsheet headers map to system fields.



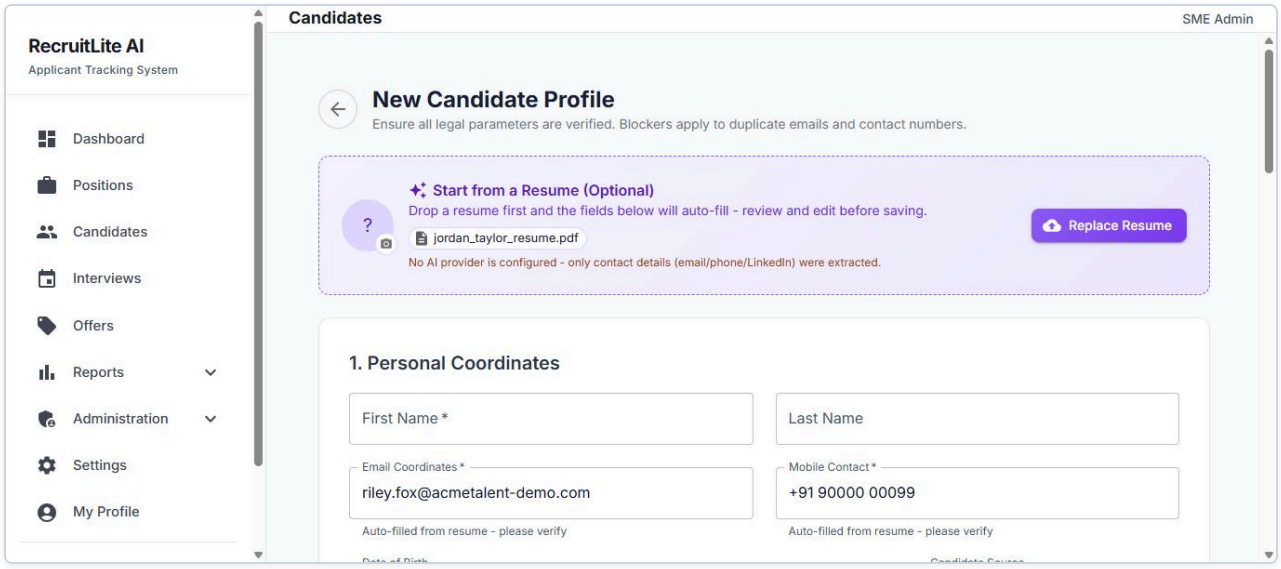
Step 3 - Resolve Values: confirms every value already matches the catalog.



Step 4 - Results: a complete row-by-row import outcome.

8. Resume Parsing & AI Data Extraction

- Automatic parsing of PDF and Word (.docx) resumes extracts skills, education, employment history, and contact details without manual data entry.
- Uses your company's configured AI provider (Section 14.5) - a local self-hosted model by default, or your own cloud key. If no provider is reachable, contact details still extract and the rest of the form is left for manual entry rather than failing outright.
- **Smart retry** - if an initial extraction comes back too sparse (most fields empty), the system automatically re-prompts with a reworded pass and fills in only the gaps.
- **Automatic photo extraction** - pulls an embedded candidate photo straight out of the resume file, when present.
- **Inbound email intake** - a candidate can simply email their resume to the company's configured inbox; a new "Pending Review" candidate record is created automatically for a recruiter to triage.



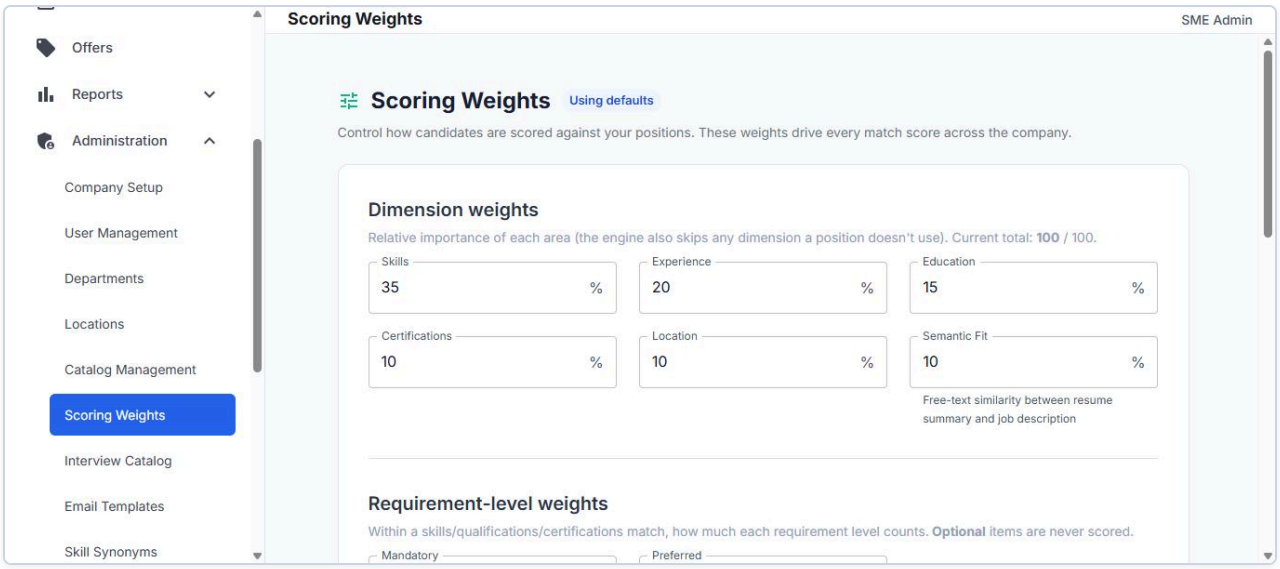
Start from a Resume - drop a file in and the form auto-fills.

9. AI-Powered Matching & Scoring

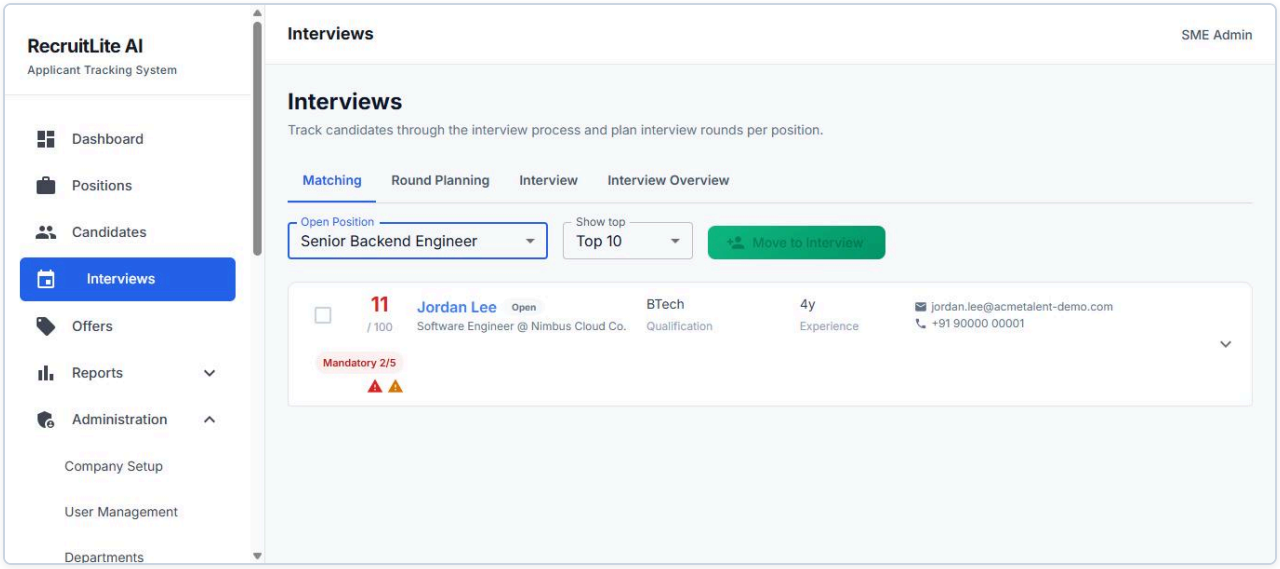
The heart of RecruitLite AI is a transparent, rules-based scoring engine your company controls - never an opaque ranking algorithm no one can explain to a candidate or an auditor.

Dimension	Default weight	What it measures
Skills	35%	Overlap between the candidate's skills and the position's required and preferred skills.
Experience	20%	Years and relevance of prior work experience against the position's requirement.
Education	15%	Qualification level against the position's requirement.
Certifications	10%	Relevant certifications held versus requested.
Location	10%	Candidate location fit against the position's location.
Semantic Fit	10%	Free-text similarity between the resume and the job description, using local AI embeddings - catches good matches that keyword-only search would miss.

- Every weight, plus the per-missing-skill penalty and the minimum score benchmark, is visible in Administration and adjustable by your own Admin.
- Weights automatically rebalance when a position doesn't use every dimension, so missing data never unfairly drags a score down.
- A missing *must-have* skill is flagged with a clear score penalty (configurable, default 20% per missing mandatory skill) rather than silently removing the candidate from the list - a recruiter sees the warning and decides.
- Candidates are grouped into automatic match-quality tiers, each clickable straight through to the filtered candidate list.



Administration → Scoring Weights: every dimension and penalty is tunable.

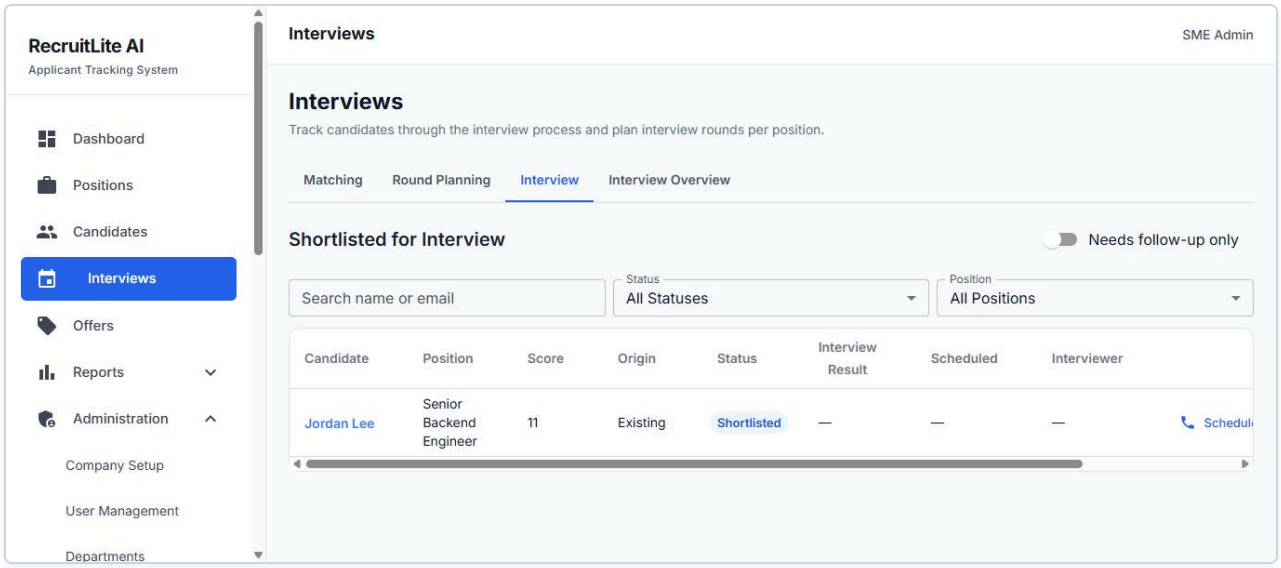


The Matching screen: live scores with mandatory-skill warnings per candidate.

10. Interview Management

10.1 Matching to Interview

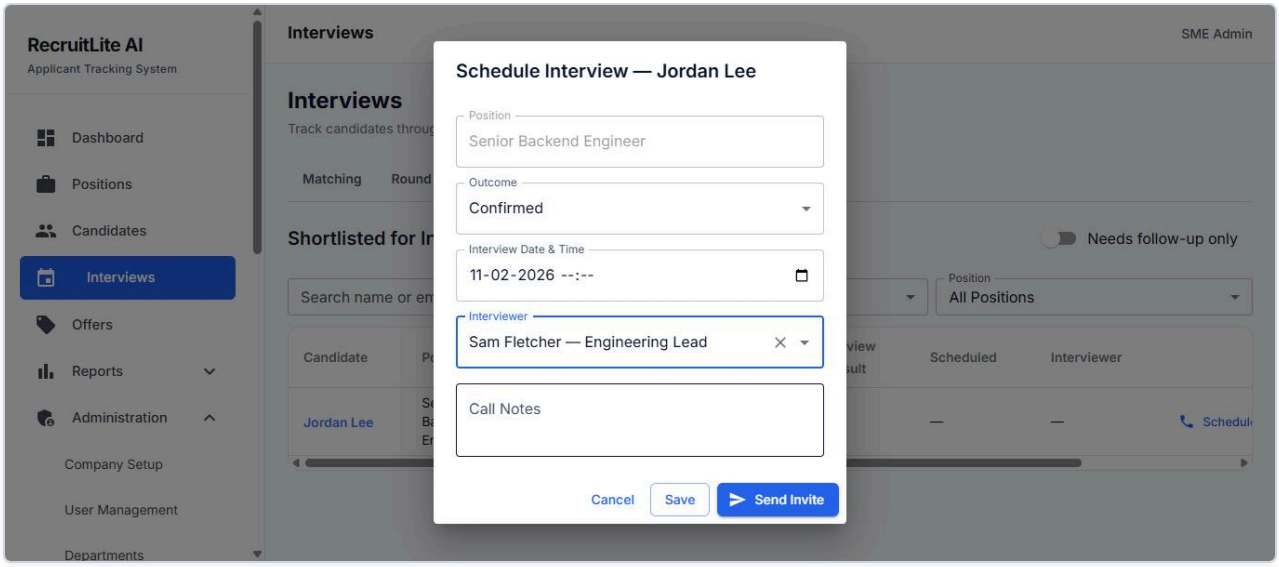
The Interviews module's own Matching tab (shared with Section 9) lets a recruiter select scored candidates and move them straight into the interview pipeline with one click.



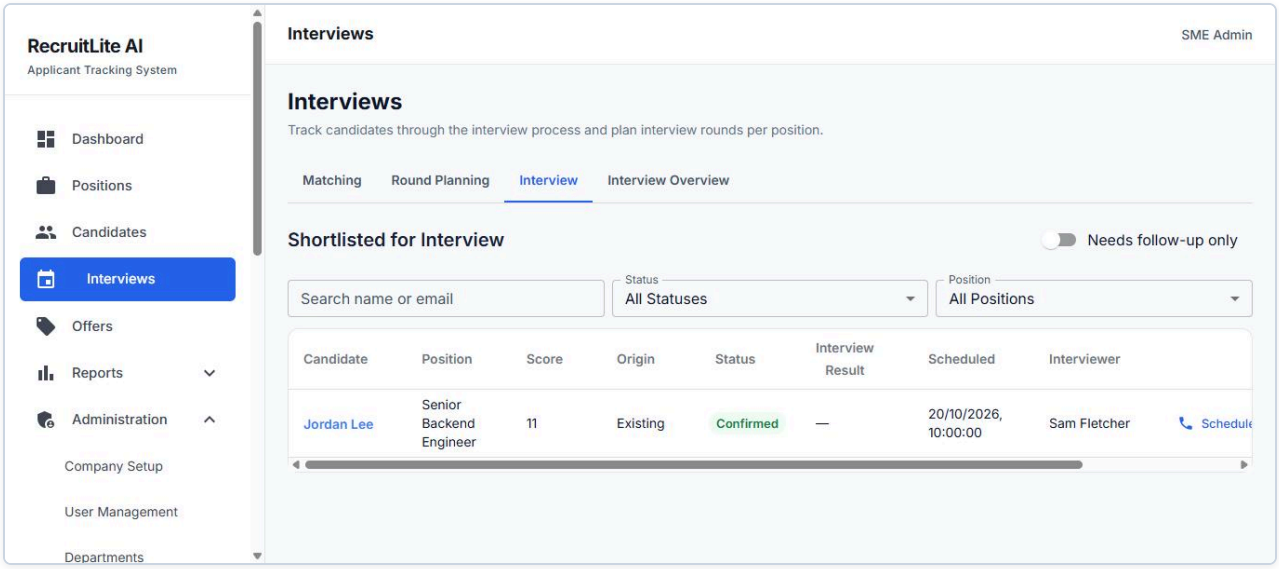
Shortlisted for Interview - candidates moved from Matching.

10.2 Scheduling

Build a structured interview plan for a candidate, assign interviewers, and record feedback and a recommendation per interviewer. Reopening an interview clears any stale recommendation so it is never mistaken for a current one.



Scheduling an interview round with a date, time, and interviewer.



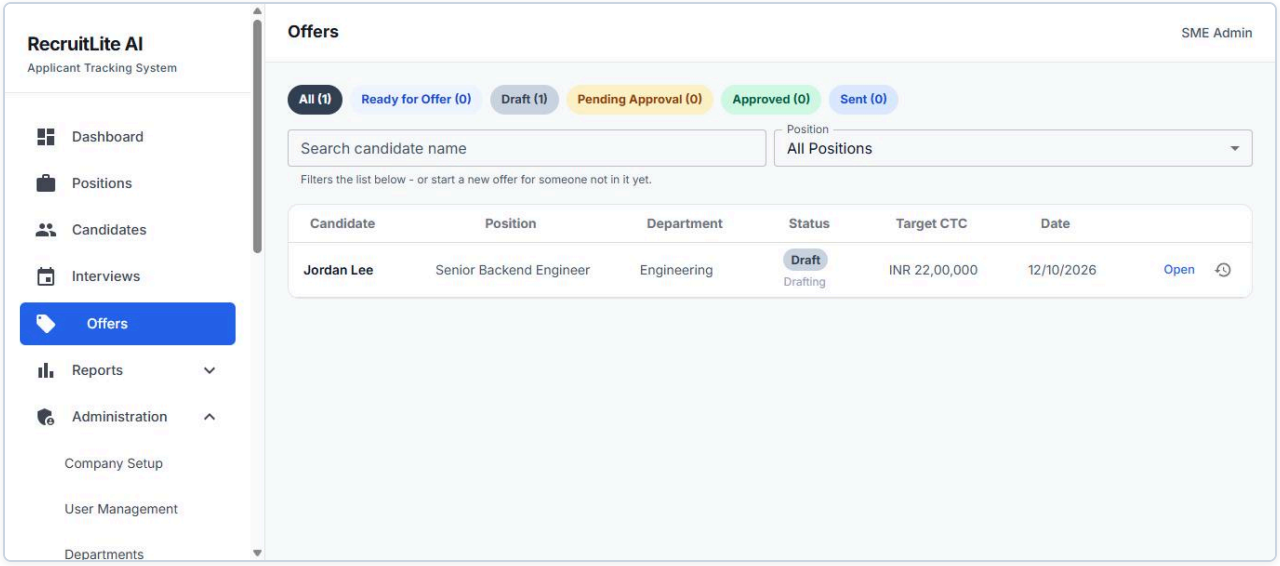
A confirmed interview, with its scheduled time and interviewer visible.

10.3 Calendar integration

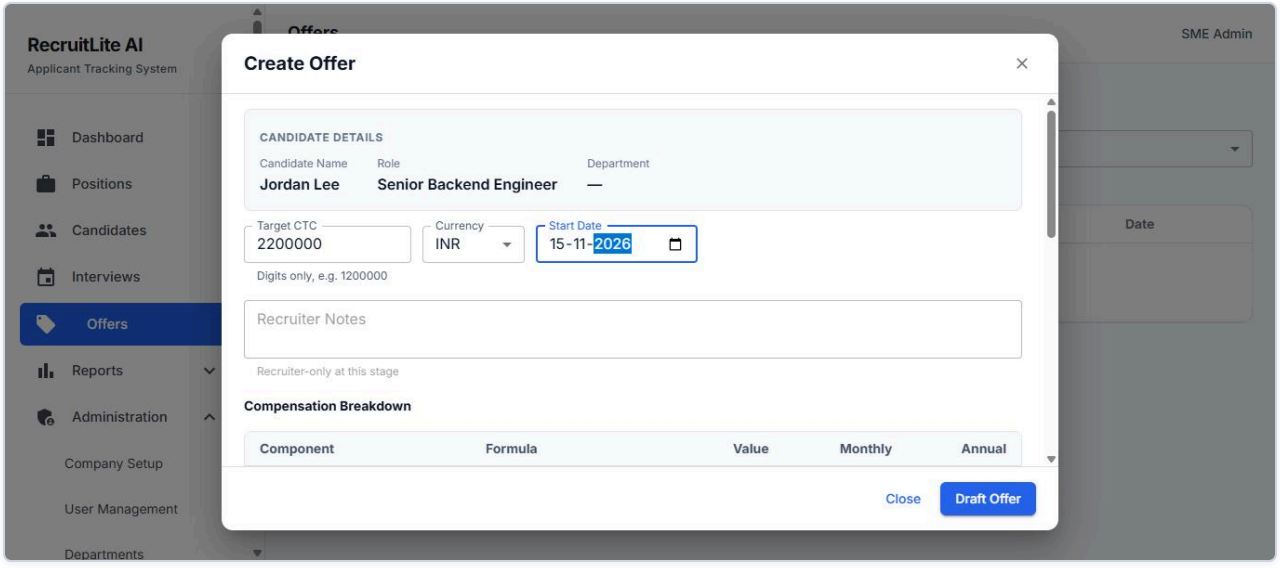
Each interviewer can securely connect their own Google or Outlook calendar (read-only). Once connected, their real availability shows up directly when scheduling, so there is never a double-booking surprise. This is a per-user connection - connecting your own calendar does not expose anyone else's.

11. Offer Management

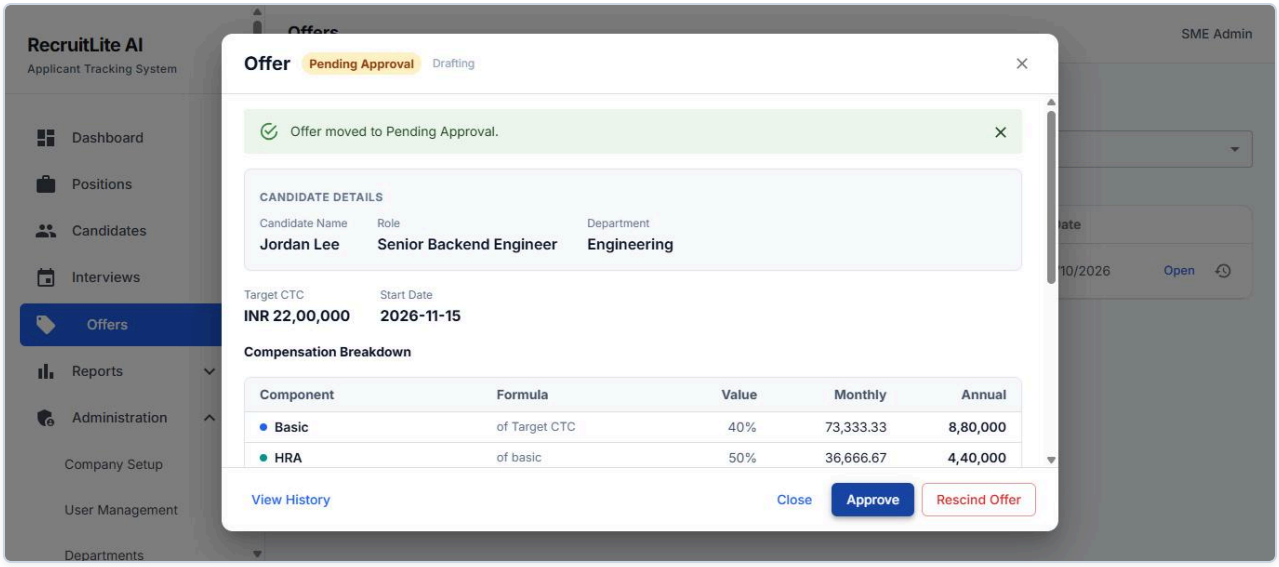
Offers follow a controlled lifecycle: Draft → Pending Approval → Approved → Sent → Accepted / Declined / Rescinded / Countered. Nothing reaches a candidate without sign-off. An Approver may approve an offer they drafted themselves - there is no separate-approver requirement on this step.



The Offer Pipeline - every offer's current status at a glance.

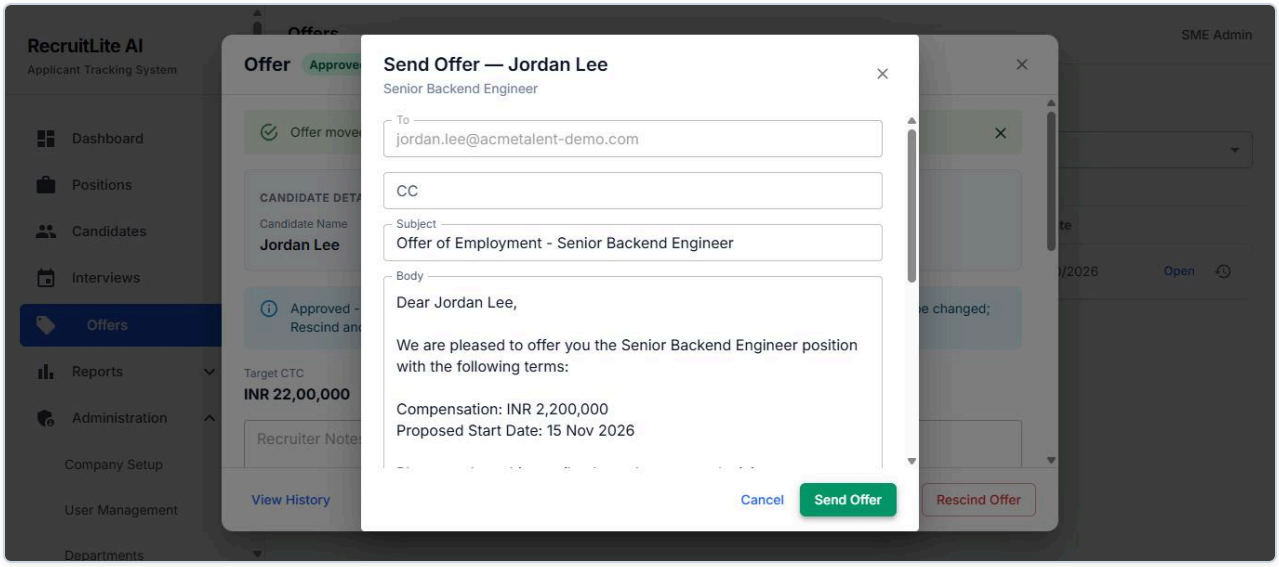


Creating an offer: target CTC, start date, and an auto-computed compensation breakdown.

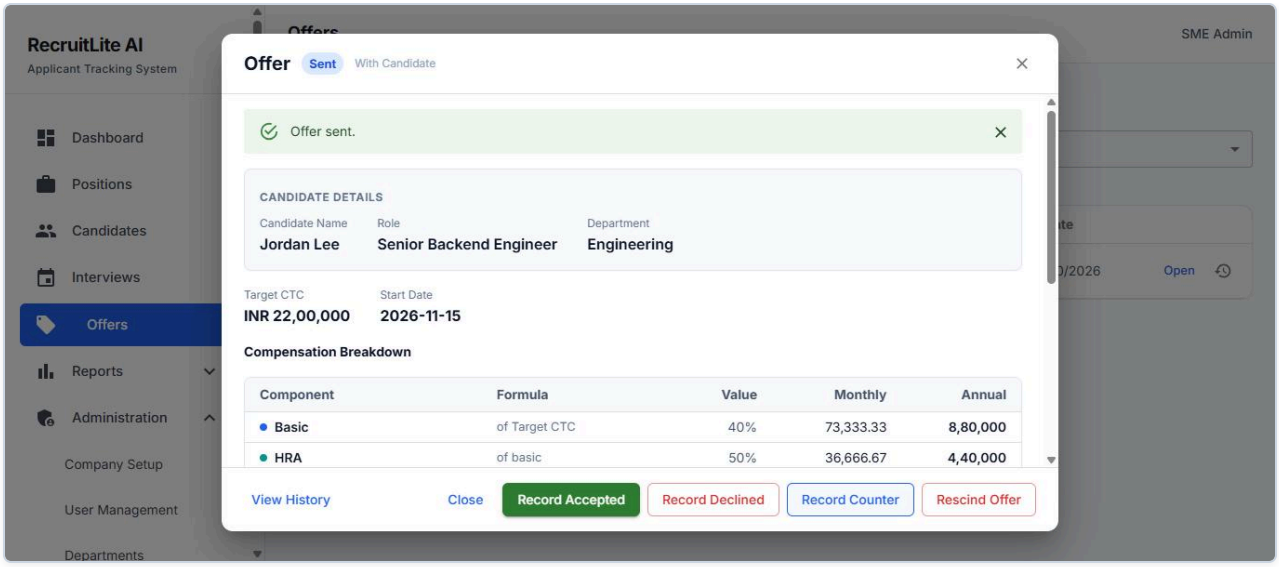


An offer Pending Approval, with its full compensation breakdown visible to the Approver.

- **AI-assisted email drafting** gives the recruiter a fast starting point for the offer email, always reviewed and editable by a human before sending.
- **Candidate self-service** - a secure, emailed link (no login required) lets the candidate accept, decline, or counter the offer themselves, on their own time.
- **Compensation ceiling** - in the Compensation Template (Administration), a "% of another component" row can carry an optional statutory-style ceiling, entered as a monthly amount: No ceiling (default), Cap at ceiling (the computed amount is reduced down to the ceiling, never zeroed), or Cutoff above ceiling (the component drops to zero once the computed percentage would exceed it) - useful for a component like PF or ESI that follows a government wage ceiling. The ceiling is frozen into the offer at the moment it's created, the same as every other compensation figure; changing the template's ceiling later never retroactively changes an existing offer.



The Send Offer email, ready to review and edit before it goes out.



Offer Sent - now With Candidate, awaiting their response.

The Offer Pipeline screen is a worklist of currently-active offers; use **View History** on an offer to see its full sequence of past events, including any counter-offers.

11.1 From Accepted offer to Joined

Accepting an offer and actually starting work are two separate, deliberately distinct events:

- When a candidate accepts an offer, their candidate status automatically becomes **Offer Accepted** - not Joined. This status is excluded from the default Active candidate view, the same as Joined.
- Once the candidate has actually started, a Company Admin, Recruiter, Approver, or Interview Finaliser clicks **Record Joining Date** on their row (visible only while they're Offer Accepted), enters the date, and confirms. The candidate's status becomes **Joined** and the joining date is stamped on their profile.
- **Automatic position close.** The moment every opening on a position has a Joined candidate, the position closes itself automatically - no separate "mark as filled" step - and any other candidates still waiting on a Scheduled interview round for that position have that round cancelled.
- **Rejecting a Joined candidate** (for a later withdrawal or a conduct issue discovered after the fact) requires Approver or Company Admin sign-off and a reason - the one exception to Reject's normal wider role access.

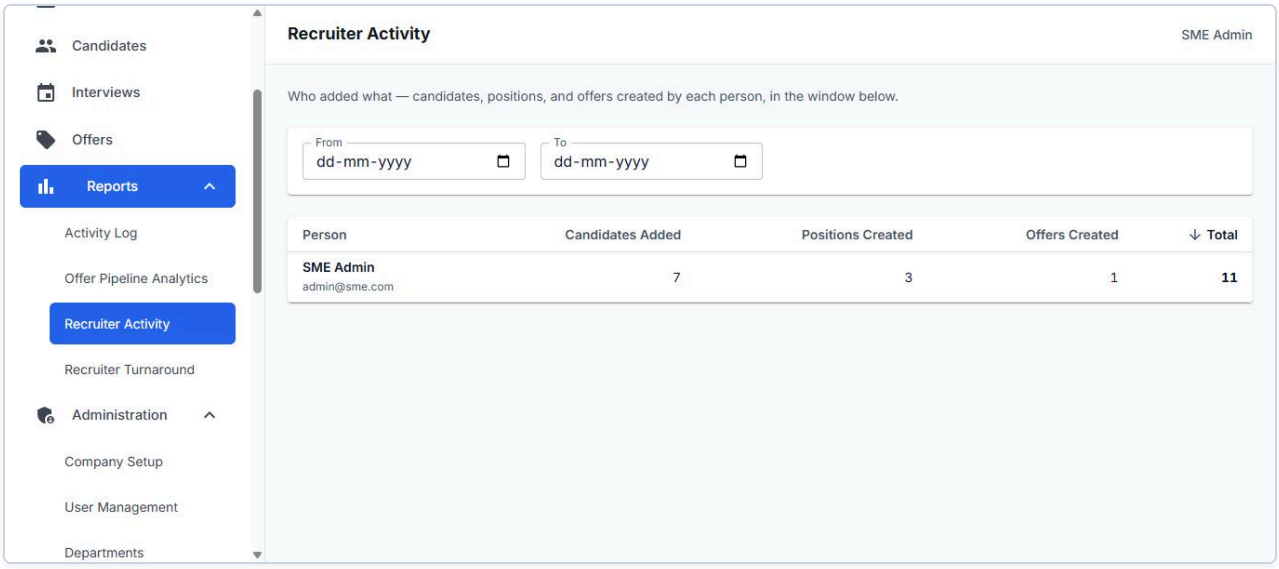
12. Reports & Analytics

Built-in reports are available from the Reports module, all chart- and table-driven:

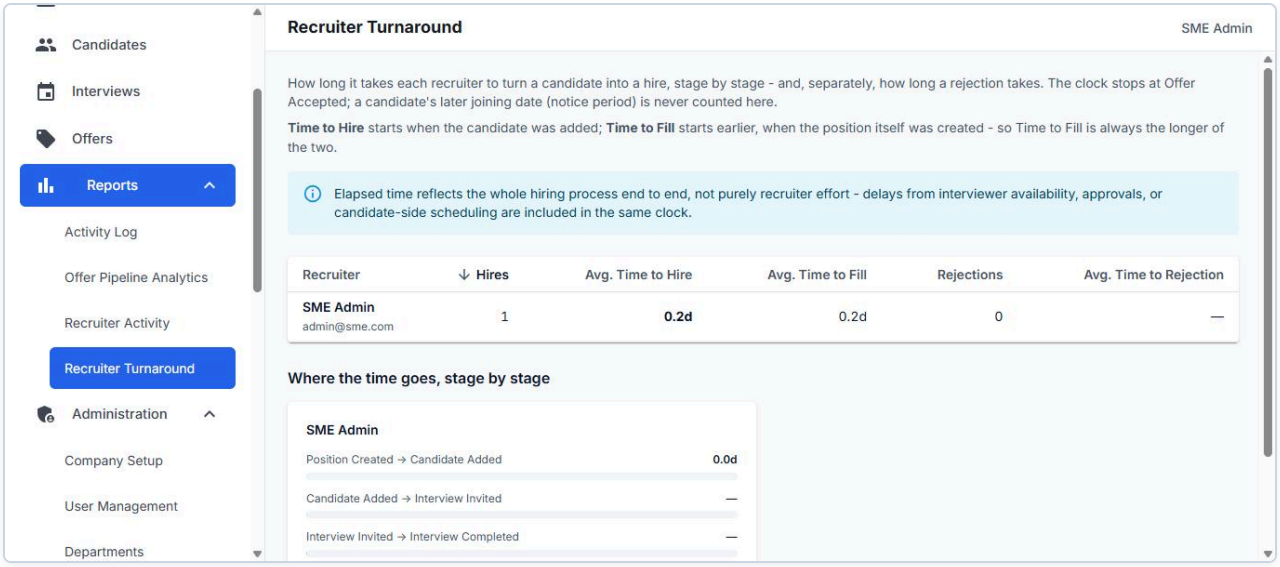
- **Hiring Funnel** - candidate volume at each pipeline stage (shown live on the Dashboard, Section 4).
- **Offer Pipeline Analytics** - where every offer stands right now, and what compensation looks like once it goes out the door.
- **Recruiter Activity** - candidates, positions, and offers created per person.
- **Recruiter Turnaround** - time-to-hire and time-to-fill, stage by stage, per recruiter.
- **Activity Log** - a full, searchable audit trail of key actions across the system.



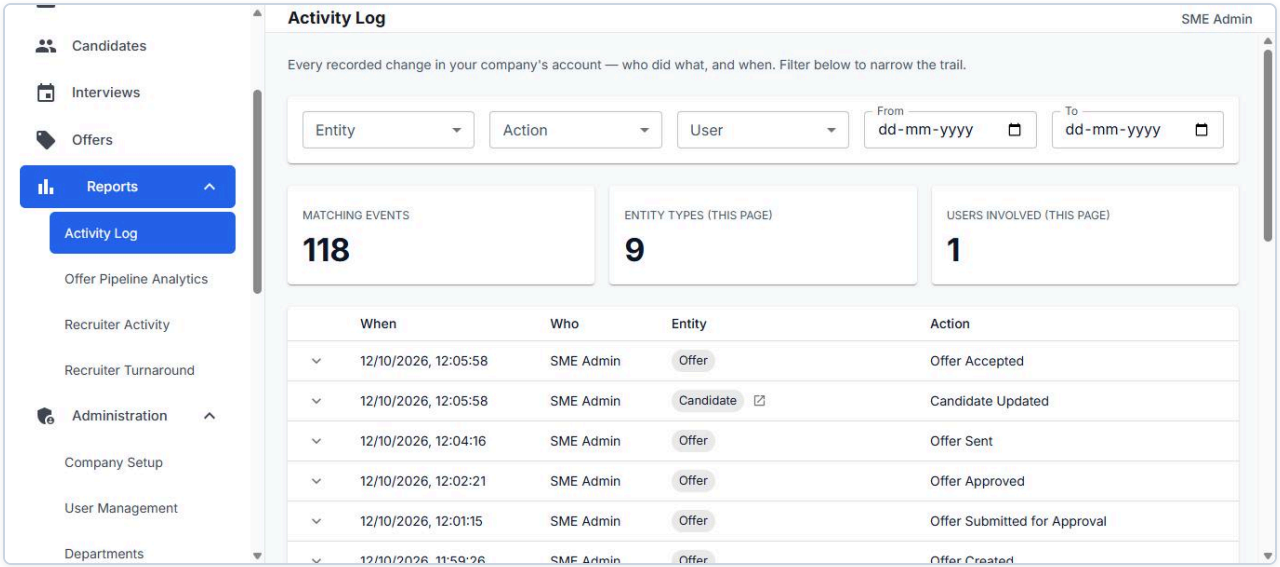
Offer Pipeline Analytics - funnel stages and average target CTC.



Recruiter Activity - who added what, in the selected window.



Recruiter Turnaround - average time to hire and to fill, stage by stage.



Activity Log - a full audit trail of who did what, and when.

13. AI Recruiting Assistant

Available throughout the app (for companies with the feature licensed), the AI Assistant answers real questions about your actual data - for example, "how many candidates are at the offer stage for this role?" - by calling real tools under the hood (search, dashboard metrics, match-reasoning explanations, semantic search, and more) instead of guessing.

- Explains errors you encounter in plain language.
- Can suggest interview questions tailored to a specific role.
- Built-in safeguard: it can never fabricate a false "you don't have permission" excuse to avoid answering a question it should be able to answer.

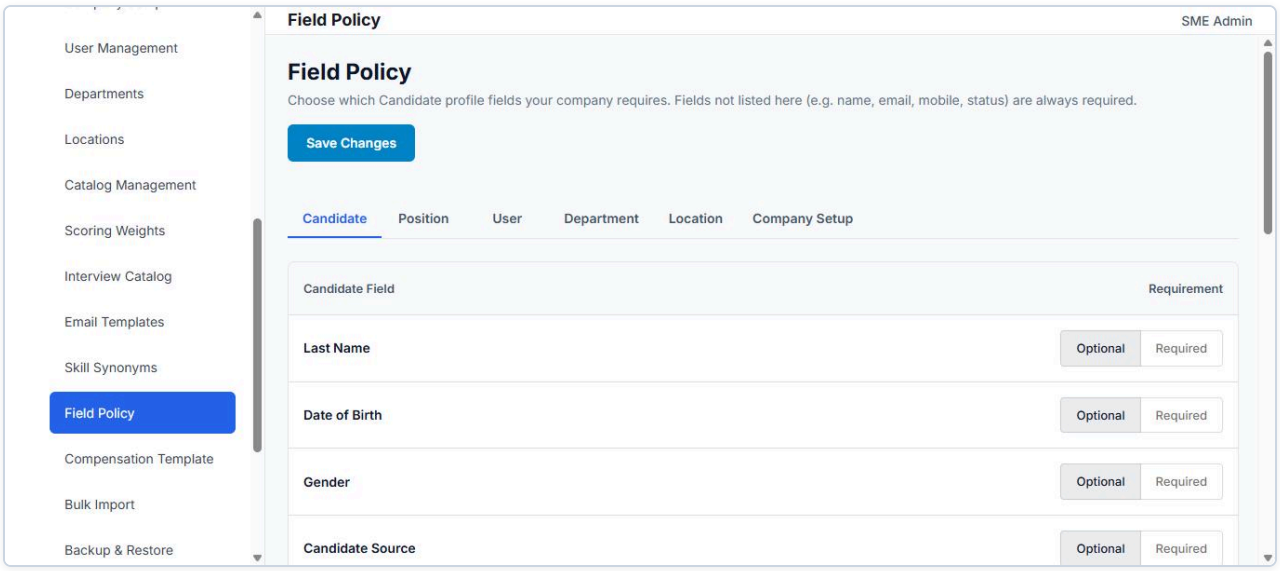
Opened from the floating assistant icon available on every authenticated screen.

14. Administration & Configuration

Administration screens are visible to Company Admin (and Platform Admin) only.

14.1 Field Policy

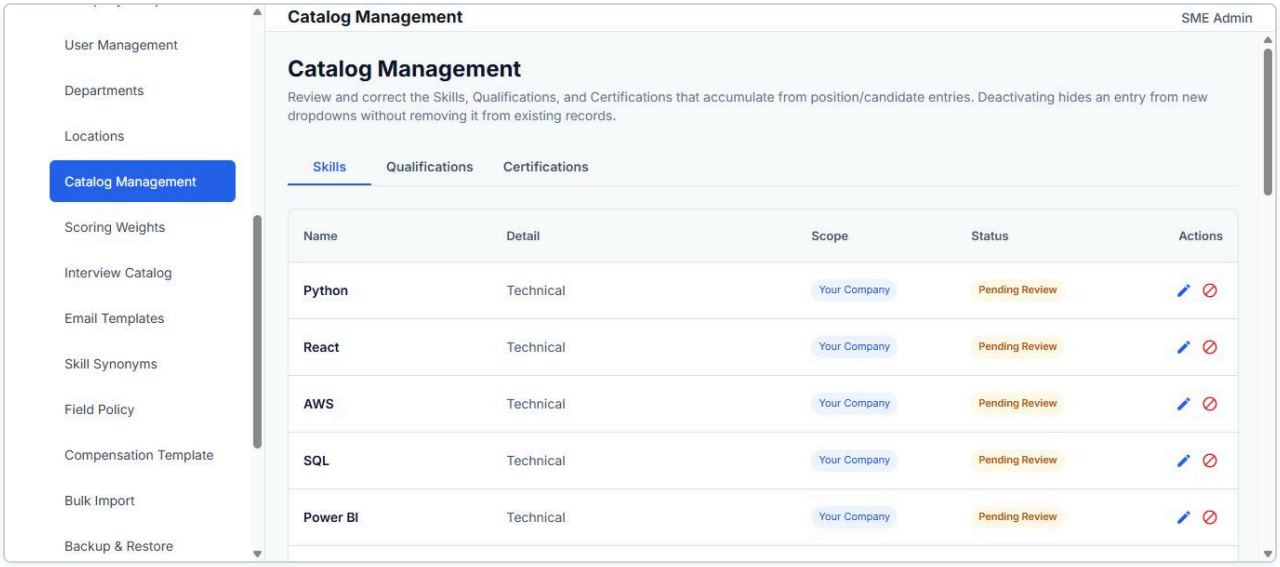
Decide which fields are Required versus Optional, per screen, across Candidates, Positions, Users, Departments, Locations, and Company Setup - no developer and no code change needed.



Field Policy - toggle Required/Optional per field, per screen.

14.2 Catalog Management

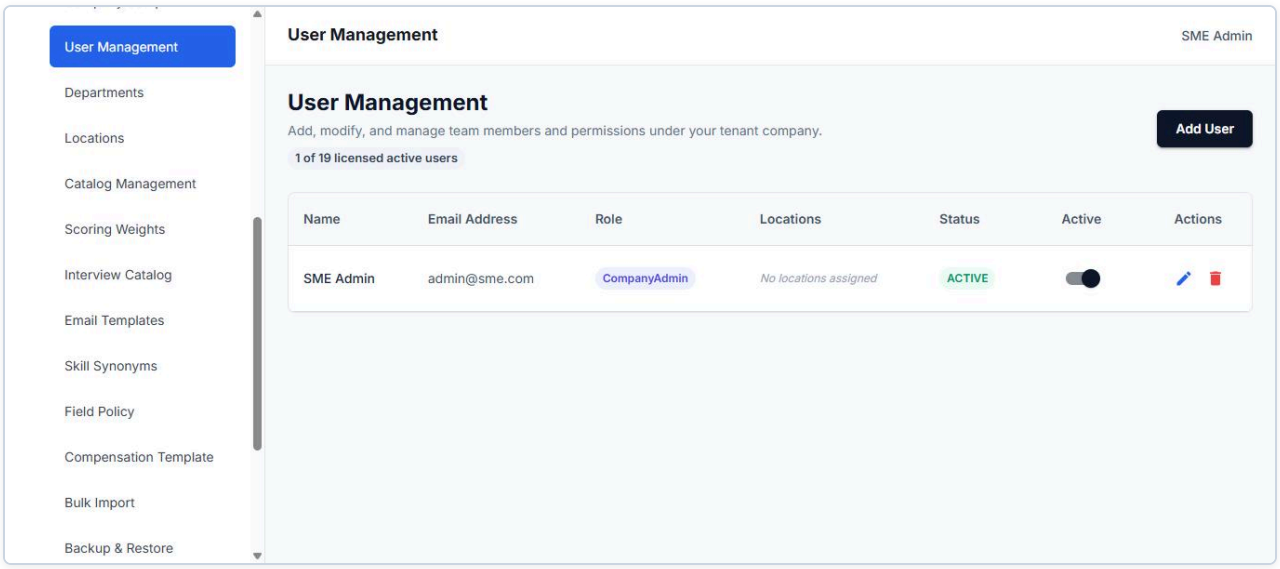
Rename, recategorize, or retire duplicate Skills, Qualifications, and Certifications; map synonyms (e.g. "JS" = "JavaScript") so matching is not fooled by spelling differences.



Catalog Management - review Skills, Qualifications, and Certifications.

14.3 Users & Multi-role assignment

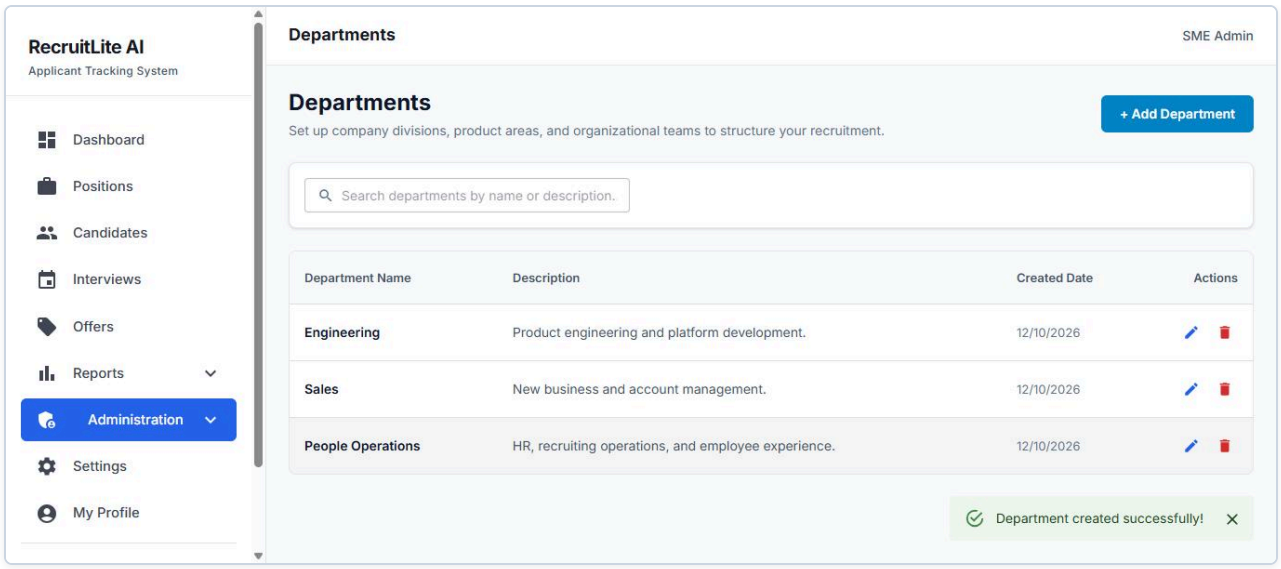
Company Admin manages user accounts from User Management, including resetting passwords and assigning combinable roles (Section 3) - one person can genuinely hold more than one role at once.



User Management - accounts, roles, and license usage.

14.4 Departments, Locations & Company Setup

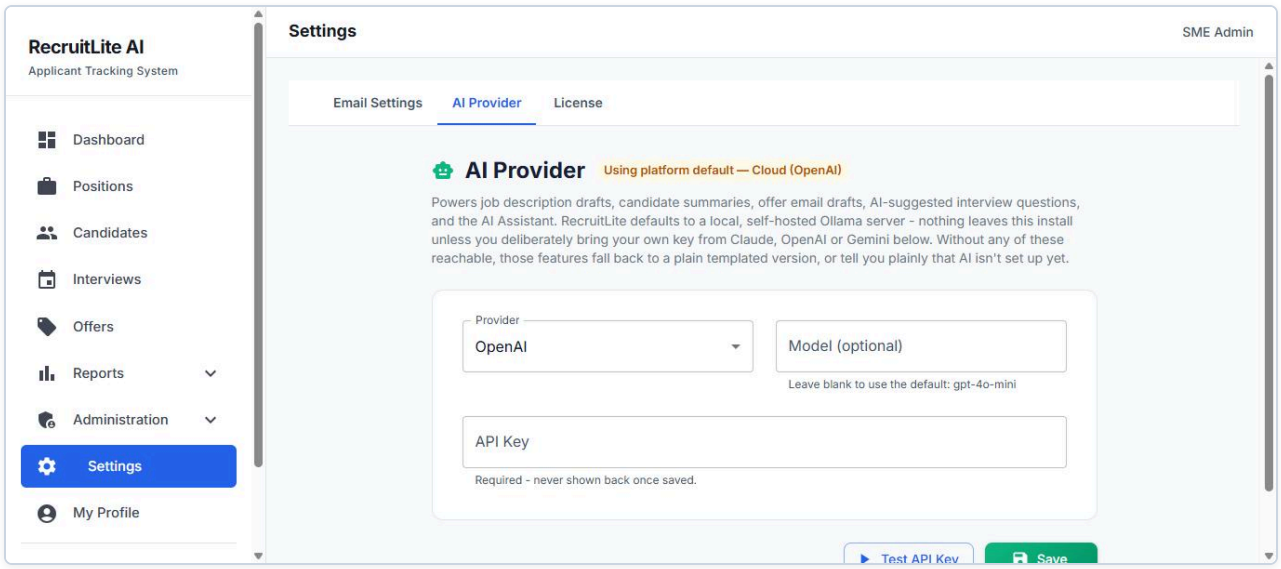
Managed centrally in one place, these feed dropdowns and Field Policy rules used throughout the rest of the app.



Departments - organize your company's divisions and teams.

14.5 AI Provider Settings

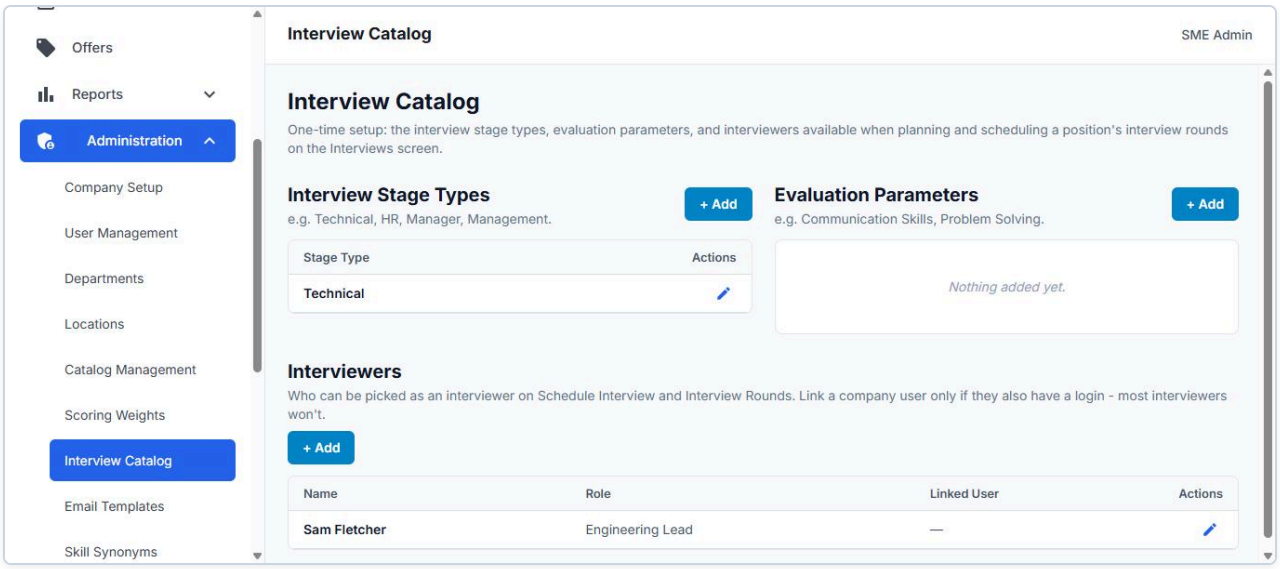
Your company can bring its own AI provider key (Claude, OpenAI, or Gemini) for Job Description generation, candidate summaries, offer email drafts, and resume data extraction - or rely on the platform default. Core candidate-to-position matching always runs locally regardless.



AI Provider settings - bring your own key, or use the platform default.

14.6 Interview Catalog

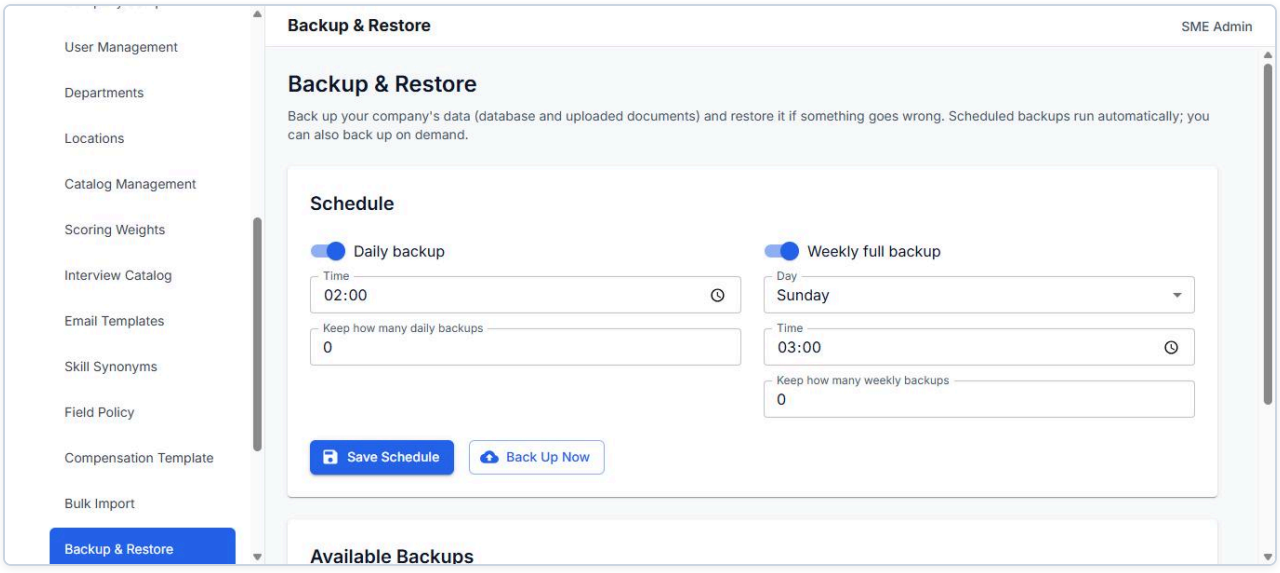
One-time setup of interview stage types (Technical, HR, Management, ...), evaluation parameters, and the interviewer directory used when planning and scheduling rounds.



Interview Catalog - stage types, evaluation parameters, and interviewers.

14.7 Backup & Restore

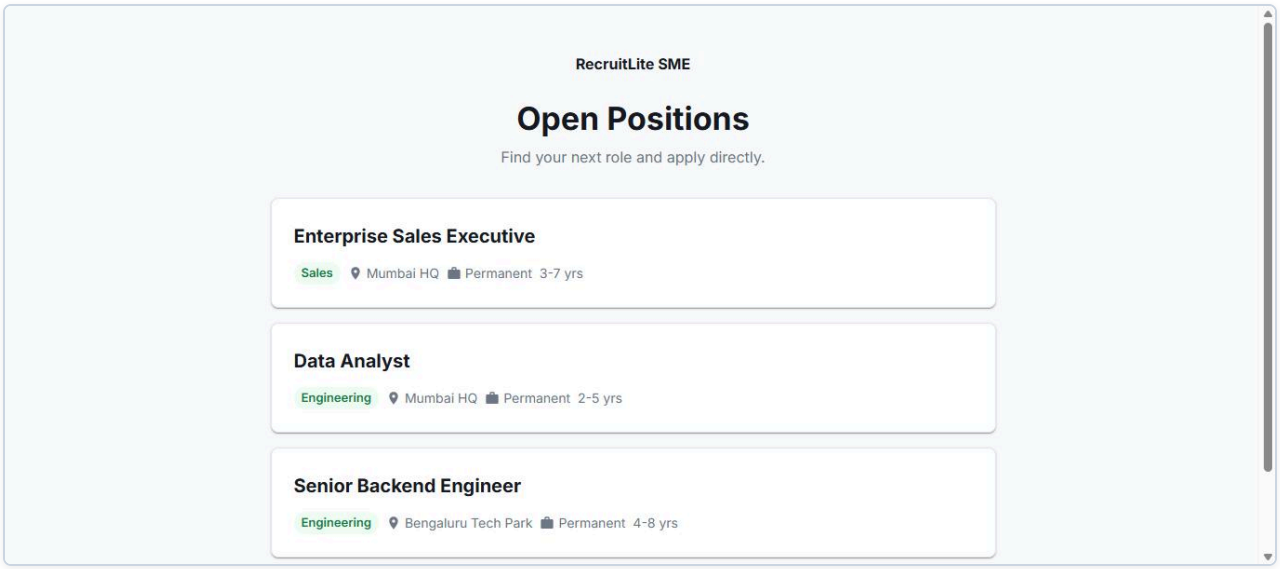
Administration → Backup & Restore lets you schedule daily/weekly backups, run an on-demand "Back up now", download a backup to your own computer, and restore from one - all from inside the app, no server console access needed. Backups made this way are encrypted at rest; downloaded copies are handed to you decrypted so they stay usable even if this server is later lost. See the Installation Guide for the script-based disaster-recovery fallback used only when the application itself cannot start.



Backup & Restore - schedule, run on demand, or restore.

15. Public Careers Page & Job Board Distribution

- A real, public, no-login careers page lets candidates browse your open positions and apply directly, with resume upload (PDF, DOC, or DOCX) - no separate careers site to build or maintain.
- A one-click Indeed feed integration keeps your open positions in sync on Indeed automatically.
- A ready-to-paste copy helper lets you post the same position to LinkedIn and Naukri without retyping it.



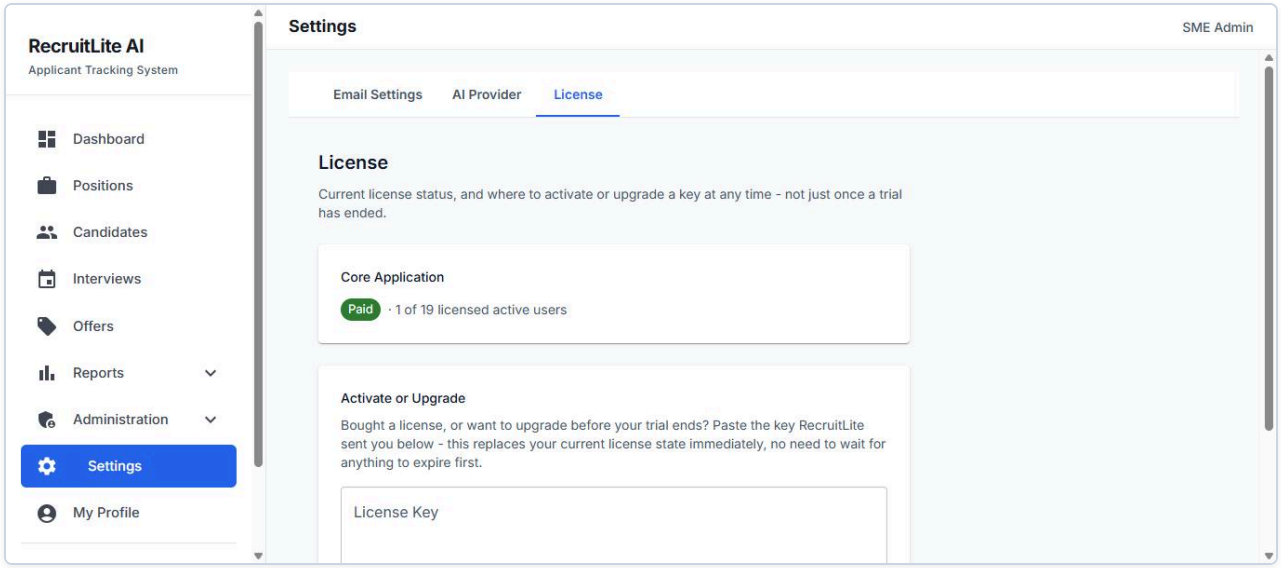
The public Careers page - no login required to browse or apply.

16. Security & Data Governance

- Role-based access control with distinct roles for Recruiters, Hiring Managers, Approvers, Interview Finalisers, and Admins (Section 3).
- A full audit trail of key actions - who did what, and when (visible via the Activity Log report, Section 12).
- Secure session handling using httpOnly cookies rather than browser local storage, plus bcrypt-hashed passwords and JWT-based authentication.
- Built-in brute-force login protection.

17. Licensing & Your Account

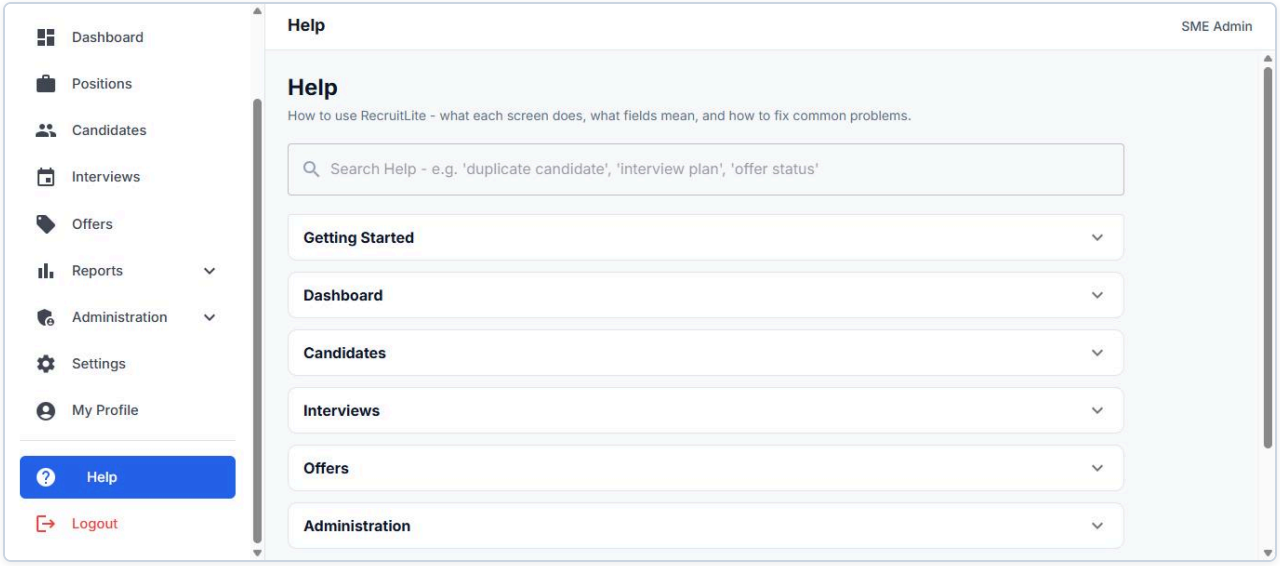
- Licensing is priced by how many active users you have, not by role or module.
- A free self-serve trial starts automatically when your company first registers - no sales call required.
- Activate or upgrade your license yourself from Settings at any time - there is no lockout and no waiting on anyone to "flip a switch" remotely.
- During a trial, a banner shows the days remaining and disappears automatically once a paid license is activated.



Settings → License - current status and where to activate or upgrade.

18. Help Center

A built-in Help Center, reachable from inside the app, holds articles organised by module (Getting Started, Dashboard, Candidates, Interviews, Offers, Administration, and more), kept current with every new feature so your team has answers without ever leaving the app.



Help Center - searchable, organized by module.

19. Troubleshooting & FAQ

Issue	What to check
I can't log in	Confirm the address (localhost vs. the shared server address), check Caps Lock, and use "Forgot Password" or ask your Company Admin to reset it.
A candidate I expect to see is missing from a position's Matching tab	They may be below that position's score benchmark, or already Rejected/Blacklisted. Check their status and score on their profile.
I can't set a candidate's status to Joined or Offer Accepted from the status dropdown	By design - these two statuses can only be reached through their own actions (an accepted offer, and Record Joining Date), never by direct edit. See Section 11.1.
A resume didn't parse completely	The system automatically retries sparse extractions once; confirm your company's AI Provider is configured and reachable (Section 14.5) - without one, only contact details extract.
I don't see Administration in the menu	Administration is visible to Company Admin (and Platform Admin) only - ask your Company Admin for the change you need.
The trial banner won't go away	It disappears automatically once a paid license key is activated in Settings; if it persists, re-check that activation step.
My interviewer's calendar availability isn't showing	That interviewer needs to connect their own Google or Outlook calendar first - this is a one-time, per-person step.

20. Glossary

Term	Meaning
Company Admin	The exclusive admin role that owns all settings for your company's install.
Match score	The weighted, explainable score (Skills, Experience, Education, Certifications, Location, Semantic Fit) linking a candidate to a position.
Panelised	A candidate screened out of one position who remains eligible to resurface on other open positions once they clear that position's benchmark.
Benchmark	The minimum match score a position requires before a candidate is displayed on the Matching screen or can move to Interview.
Semantic Fit	The free-text, AI-embedding-based similarity between a resume and a job description; one of the six match-score dimensions.
Interview Finaliser	The role that records the final agreed offer terms and outcome, and can see compensation figures.
Offer Accepted	A candidate status set automatically when an offer is accepted - the candidate hasn't started yet. Excluded from the default Active view, same as Joined (Section 11.1).
Joined	A candidate status reached only by recording a joining date (Section 11.1) - confirms the candidate has actually started. Triggers automatic position close once every opening is filled.
Compensation ceiling	An optional monthly cap on a "% of another component" compensation row (Cap or Cutoff mode), useful for statutory components like PF/ESI. Frozen into the offer at creation (Section 11).
Trial	A 30-day, fully-featured evaluation period that starts automatically on company registration, before a paid license is activated.

End of User Manual. For installation and system requirements, see the companion Installation & Minimum System Requirements Guide.