Quick Guide
# Manage the candidate list

HR MANAGER
TALENT SOLUTIONS

# Overview

The candidate list includes various fields and features to help you manage the incoming applications.

In this guide, these steps will be explained as well as a few tips:

- **Candidate list**
- **Page Options**
- **Create own view**
- **The Wheel**
- **Filter candidate list**
- **Workflow**

- **Status via Drag&Drop**
- **Questionnaire**
- **Columns - Filter**
- **Email templates**
- **Toolbox**

# Candidate list

When entering a project, the candidate list is the first thing you will see.
The view of the candidate list can vary, depending on the company's work flow, page options and user roles.

# Page Options

The system has a default view of the candidate list called 'System view'. This view can be modified, if required.

You can create your own view where you select which columns are to be displayed on the candidate list.
Simply click on 'Page Options' in the top right corner and then 'Set Default View'.

Click on 'Add new View' in the drop down list to create new view.

You can also alter your page size for how many candidates that should be displayed per page by marking 25, 50, etc.

Add new Candidate    Page Options ⚙

**Candidate List Settings**

Set Default View

System view ⌄

Page Size
◉ 25
◯ 50
◯ 75
◯ 100

OK
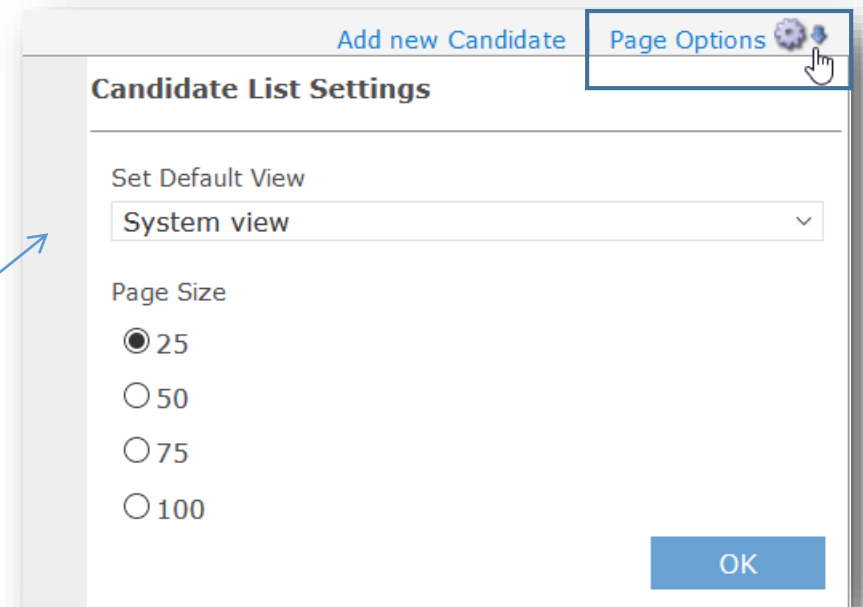
# Create own view

A list of all available columns will be listed in the 'Candidate list view editor'.

Enter a name for the view and select the columns, that you require.

To select columns, either click on the 'green plus', or drag the column to 'Selected coloumns'.

The order of the columns can also be rearranged by drag & drop.

Click 'Save' to complete.

# Own view

Once the view has been created, you need to select your own view by clicking on 'Page Option' and select the newly created view from the list.

Save on 'OK'.

You can create as many views as you like and use these on various projects.

Add new Candidate | Page Options

**Candidate List Settings**

Set Default View

My view

Page Size

◉ 25

○ 50

○ 75

○ 100

OK
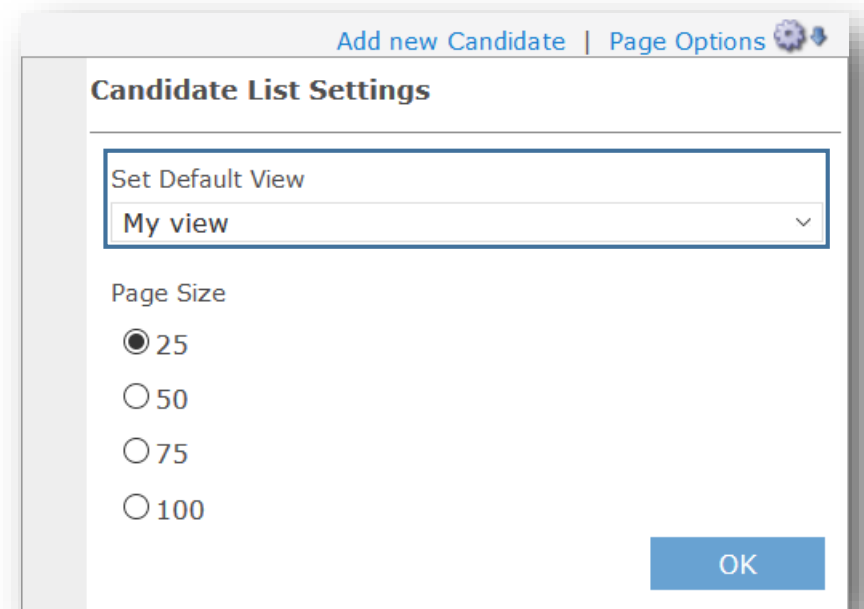
# The wheel

Each candidate has a "wheel" visible to the left. This allows you to:

- **Add note** – Create a note on the candidate. A number of notes can be added on each candidate. The notes can be edited or deleted, if required.

- **Add tag** – Select between a number of different tags together with any comment.

- **Add Rank** – Assign a rank. Candidate can only have one rank assigned.

- **Add Status** – Any status created in the workflow can be assigned to the candidate.

- **Add Hiring Committee Rank** – This rank can only be assigned, if you are a part of the hiring committee.
  -'Hiring Committee' is not activated by default.

- **Candidate information** – Access a particular tab in the candidate profile.

**NB.** Not all options are availble for all user roles.
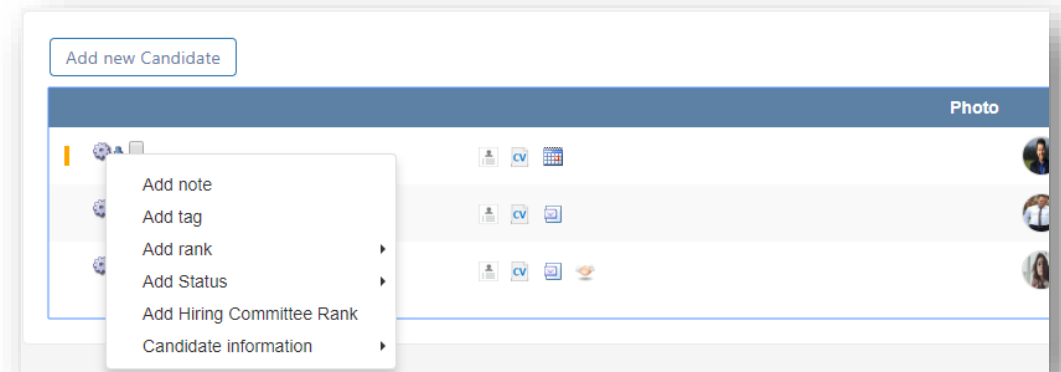
# Filter candidate list

Select the candidates you want to filter and then click the 'Filter candidate list' button located to the bottom right.

The list displayed will be the same as the filter options in the generel 'Candidate database', except that this filter is based upon your candidate list and it is project specific.
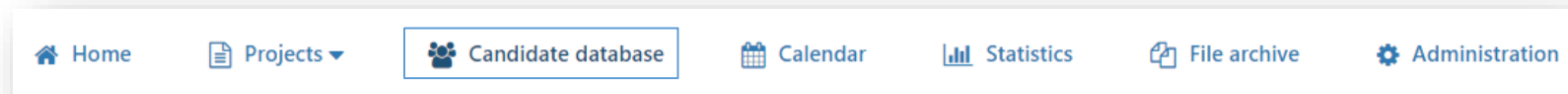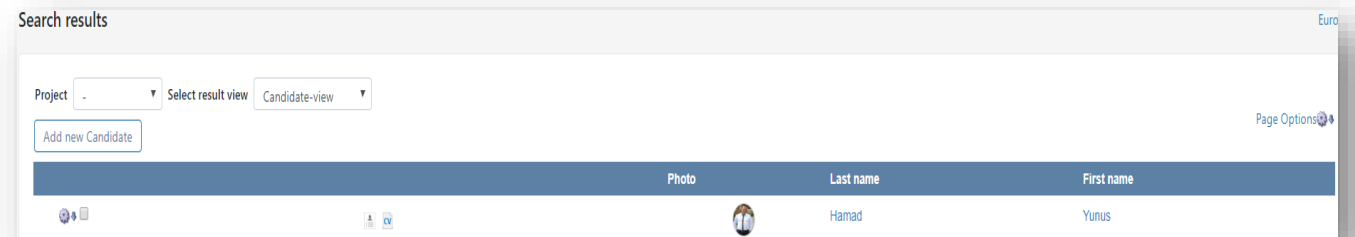
# Filter on candidate

Filtering candidate list will direct you to the Candidate database.

Here you can filter on different paramenters such as:

- General candidate information

- Ranks

- Tags

- Freetext search in documents uploaded by candidate

- Specific answers given by candidate in a questionnaire

For example, to display all candidates, assigned with the tag 'Eligable', simply select the tag and click 'Search'.
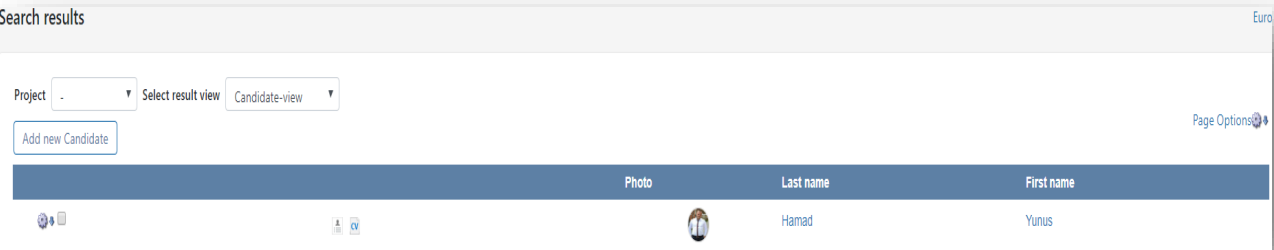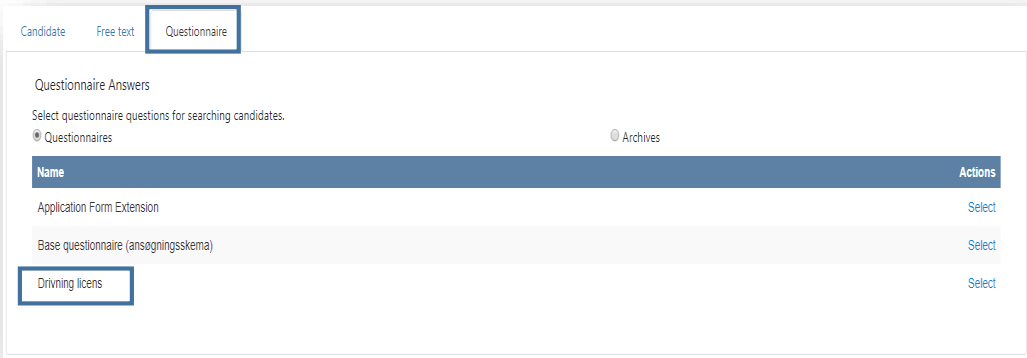
# Filter the candidate list

If a questionnaire has been added to the project, you can easily get a display of the candidate(s), who have given the wanted answer.

Select candidates and after clicking 'Filter candidate list', choose the tab 'Questionnaire'.

Click 'Select' to the questionnare, select the answers you would like displayed and the 'Search'.

The candidate list will then display the candidate(s) who have met the searched requirements.

# Workflow

The workflow steps will always be visible on the candidate list.

In the example below the following steps are displayed:

'Application  Received', 'In Process', 'Rejection', and 'Employment'.

To get a list of candidates in a particular workflow step, simply click on the specific step.

# Status via Drag&Drop

You can easily change the status of several candidates via Drag&Drop.

Once a candidate has been selected, a tag will appear before the name of the candidate.

Drag the candidate(s) to the desired workflow step using the tag. Then select the status to be assigned to the candidate(s).

# Questionnaire

Questionnaire can be added on your project as extra questions for the candidate to answer in the recruitment.

You can either create a new Questionnaire directly on the project or use a predefined.

Please see our guide for Questionnaire for further information.



**Edit project**

In this module you can edit an existing project, or create a new project.

| Project Details | Hiring Committee | Communication | Application Form | Questionnaire | Advertisement | Application Redirection | Confirmation |

**Questionnaire**

If you want this project to contain a questionnaire, please click **Create Questionnaire** or **Use Predefined Questionnaire** below.

Create questionnaire/Select questions from archive | Use Predefined Questionnaire

Previous                                                                                          Save | Save & Next

**NB.** Creating questionnaires directly on a project, means that this questionnaire i sproject specific and cannot be used in other projects. You then have to create it through Administration.

# Questionnaire on candidate list

Is a questionnaire added in the project, you can select to have some, or all of the questions/answers shown as columns in the candidate list.

Simply select the questions from the tab 'Questionnaire'.
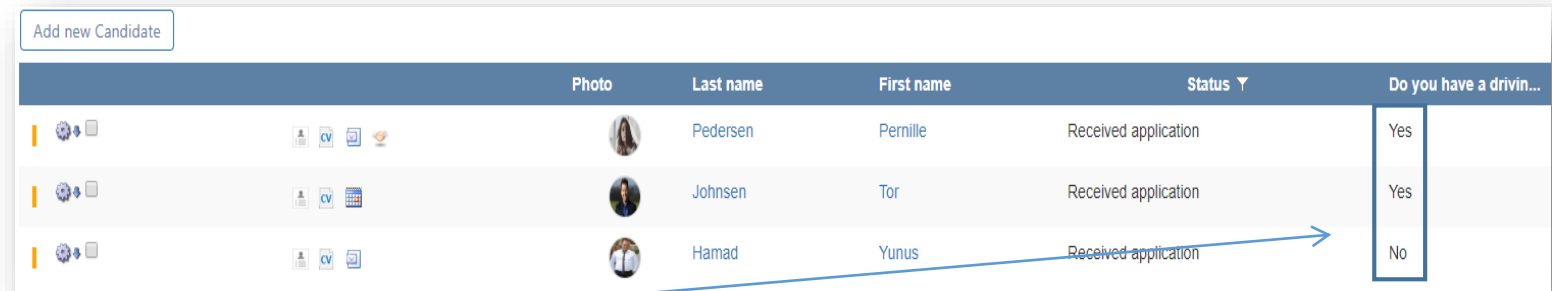
In the example, the question 'Do you have a driving license?' has been selected.



| Select | Id | Name | Type | | Actions |
|--------|-----|------|------|--|---------|
| ☑ | 255 | Drivning license | Screening | | Preview |

Select Questionnaire

OK    Cancel
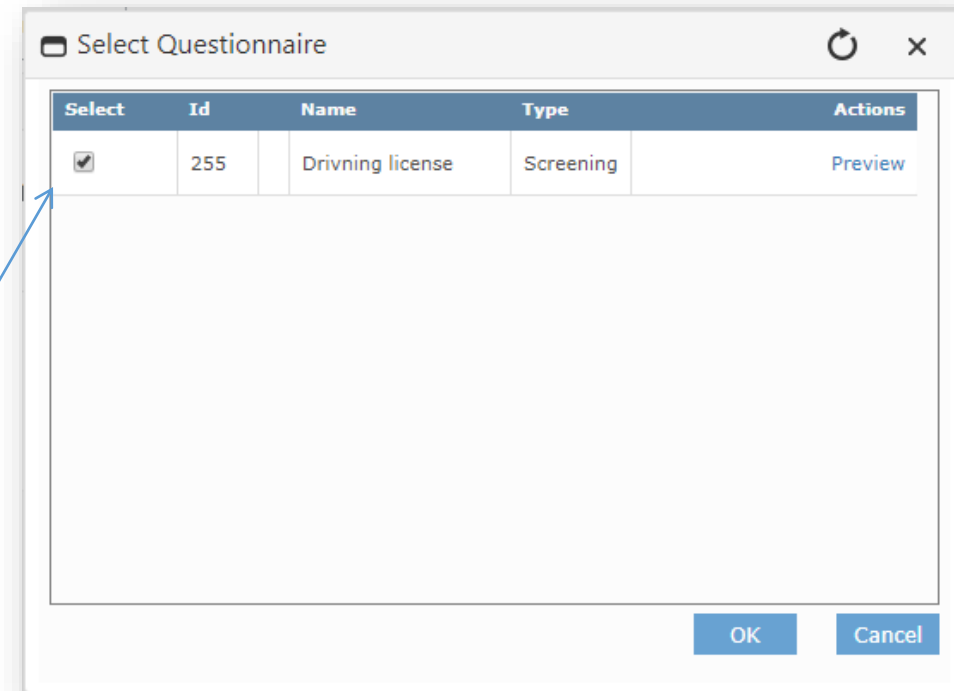
# Questionnaire on candidate list

If the column is not visible, simply add 'Questionnaire' in the 'Page options', which is above the candidate list to the right.

The candidate list now have a coloumn called 'Do you have a driving license?', together with the answers given by the candidates beneath.



Sort the coloumn by clicking on it. It will then show in an alphabetic order.

# Columns - Filter

You can also click on the 'funnel' to filter the answers displayed on the candidate list.

In this example, the 'Degree title' is being filtered. Any column with the 'funnel' can be filtered.

Remove filter by clicking 'Clear filter'.

# Email templates

The email templates are accessible in the bottom right on the candidate list for you to send out.
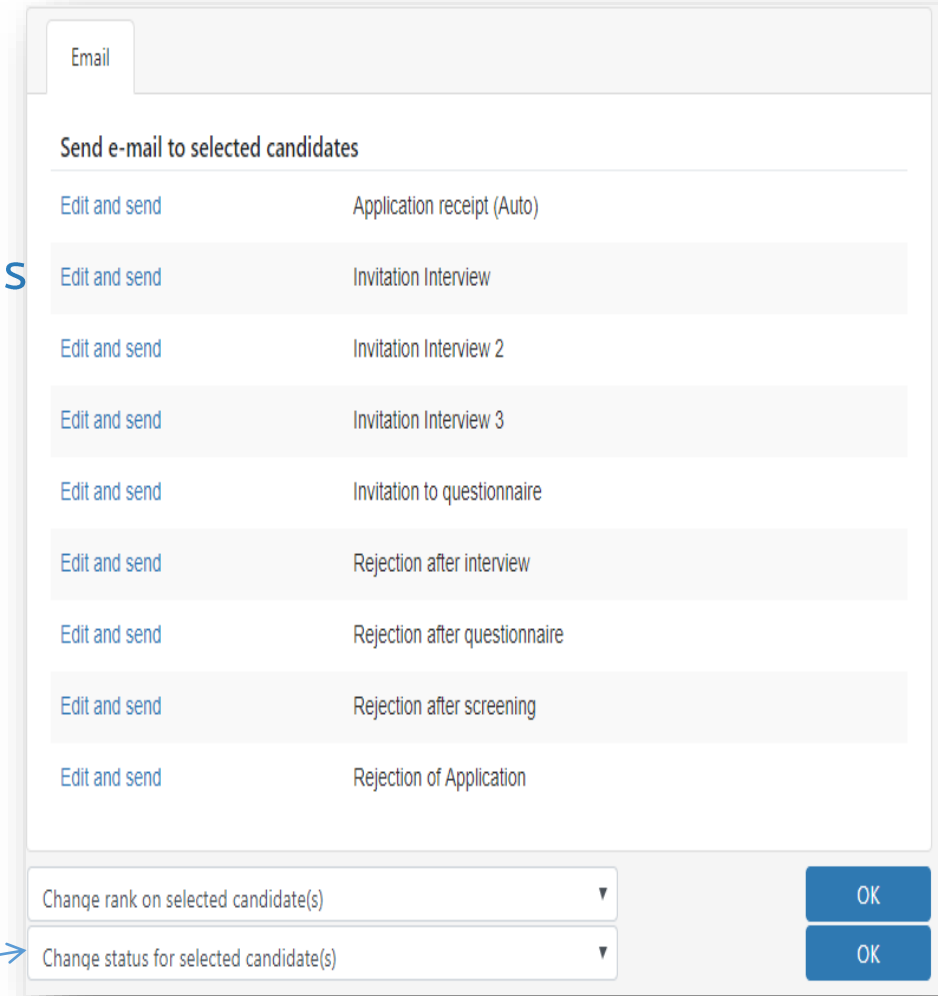
The email templates are most often associated with a status from the workflow.

So ie. if a 'Rejection of Application" is sent, the candidates status will change to the status defined in the template, as well as the candidate will be moved to the right workflow step.
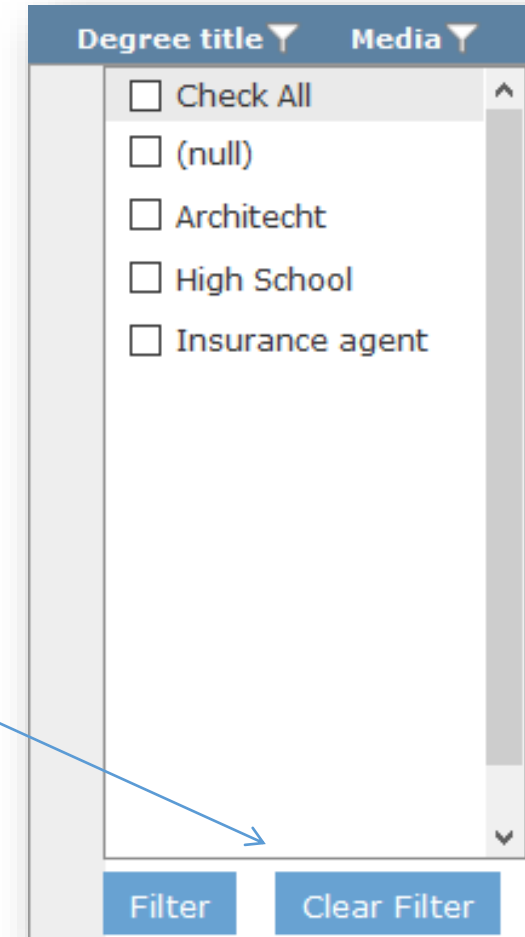
This can be changed through both your workflow and Communication in Administration.

Furthermore, under the templates, it is possible to assign multiple candidates a status or rank in one go.

Just select these from the drop down list.



Email

**Send e-mail to selected candidates**

| Edit and send | Application receipt (Auto) |
| Edit and send | Invitation Interview |
| Edit and send | Invitation Interview 2 |
| Edit and send | Invitation Interview 3 |
| Edit and send | Invitation to questionnaire |
| Edit and send | Rejection after interview |
| Edit and send | Rejection after questionnaire |
| Edit and send | Rejection after screening |
| Edit and send | Rejection of Application |

Change rank on selected candidate(s) ▾    OK

Change status for selected candidate(s) ▾    OK

# Toolbox

The 'Toolbox' is located at the bottom left side of the candidate list.

- **Send Direct Email to Selected Candidates**

- **Print candidate information** – Collect selected documents/information in one PDF-file, which can be saved, forwarded or printed

- **Export (PDF/XML/MS Excel/external)** – Export the candidate list as displayed. If 'Page option' is changed, that will also affect what is exported

- **Copy/move candidates** – Copy or move candidates to another project

- **E-mail candidate information** – Send candidate information on email to both internal and external email adresses

- **Delete selected candidates** – Can be deleted from the project or the whole system

- **Add to calendar appointment** – Create and send calendar appoinments to selected candidates

- **Export candidate list** – An extended export with customization options

**Toolbox**

Send Direct Email to Selected Candidates

Print Candidate Information

Export (PDF/XML/MS Excel/external)

Copy/Move Candidates

E-mail Candidate Information

Delete Selected Candidates

Add to Calendar Appointment

Export Candidate List

Send to External Hiring Committee
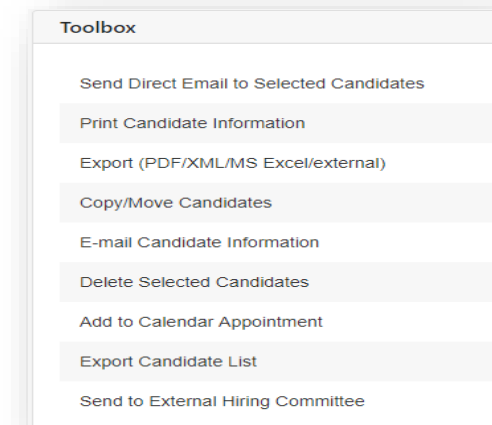
# You now know all the functionalities on the candidate list

Please contact Support for any further information ☺

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Chat with us

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