14R2 Enterprise Candidate Tracking

The **Candidates** form within an **Order** record displays the names of **Employees** who are being considered for the **Order**. The Enterprise **Order Candidates** form allows the user to easily track the *Status* of each **Employee** as they [the user] work to fill the **Order**. Information from this form also populates in the **Employee's** *Details/Candidacy* form.

The **Candidates** form is the best place for tracking your hiring process and/or actions to fill the **Order**.

There are several ways to attach **Employee's** as candidates to an **Order**. Below will discuss the candidate tracking process as well as four ways to attach employees as potential candidates to an order.

To begin with, we will discuss the ways to add Employee's as candidates on an order. Those are;

1. A completed Employee Search
2. From the Order record by completing a Candidate Search
3. From the Order record in the Actions dropdown
4. From the Employee record in the Actions dropdown

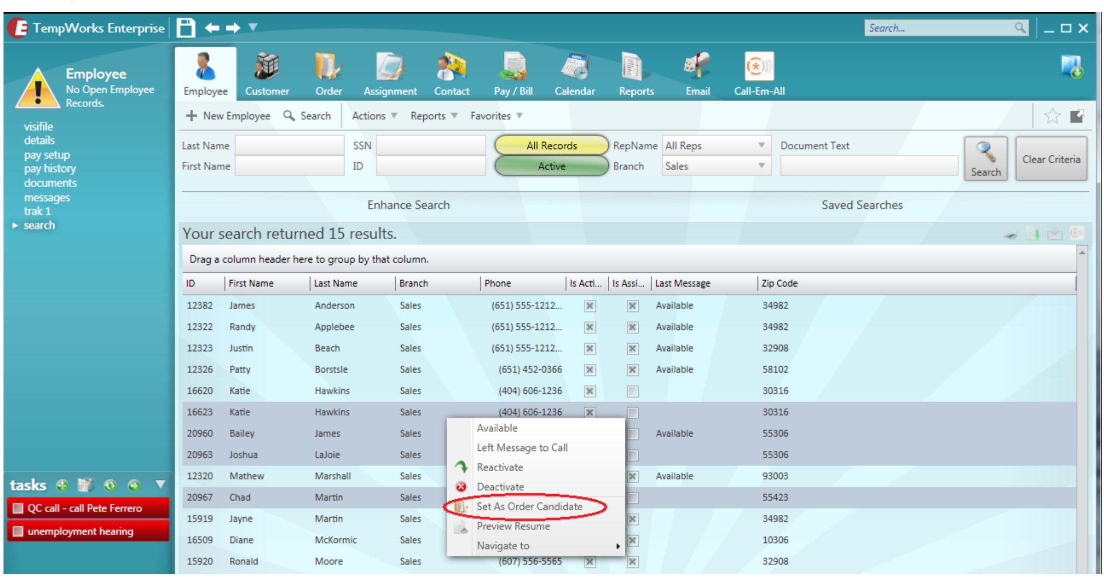
1. A completed Employee Search

Once you have completed and Employee Search, from the Employee Search results you can select the individuals you would like to place as candidates on the order.

Note: The Order you wish to add the employee(s) as a candidate(s) to must be open in the Order record.

Review the [Employee Searches Help Document](#) or the [14R2 Front Office Training Manual](#) for more information on Employee Searches.

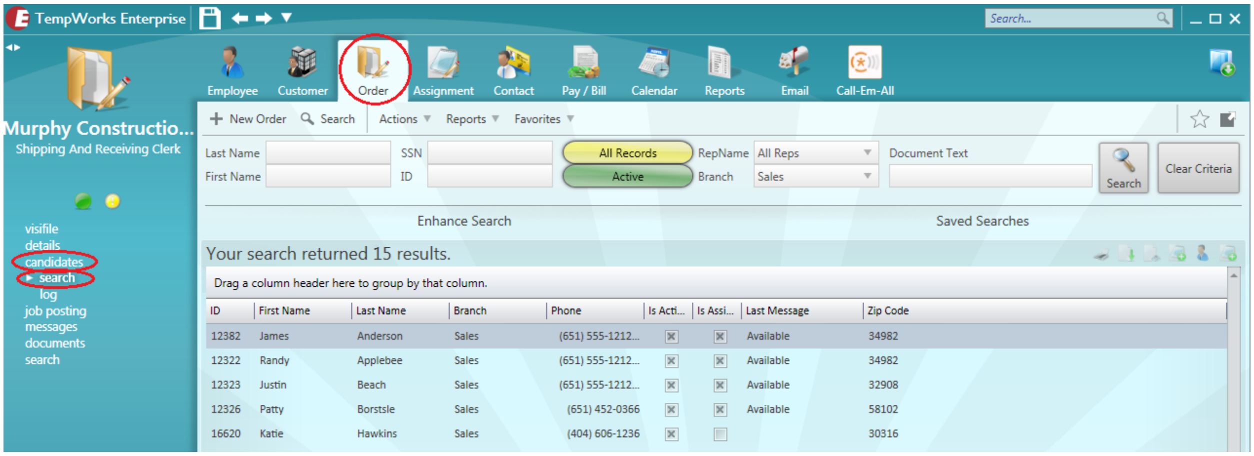
From the **Employee Search** results select individual **Employees** (hold *Ctrl* while clicking) or a group of **Employees** (select the first line, hold down *Shift*, and select the last line of the group) and then right-click to display the menu shown below:



To add the selected **Employees** to the **Order Candidates** form select *Set As Order Candidate* from the menu. They will then be added as candidates to the **Order** that is currently open in the **Order** area.

2. From the Order record by completing a Candidate Search

If you are in the **Order** record you can add employees as candidates by completing a candidate search directly from the **Order** record. To do this, open the **Order** record followed by the *candidates* record on the left hand side. From the *candidates* expansion list select *search.* See this process circled in red below.



The **Order** *candidates search* is only going to return those **Employees** who meet all of the criteria entered, and will not include any **Employee** who has an *Assignment Restriction* for this **Customer** and *Department*.

The search functionality in this area is the same as that available from the **Employee** Search form.

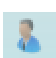
Once you have completed the search, highlighting a candidate by clicking on the line will provide you with a number of options. With a line item highlighted the following options will be displayed in the upper right;

 = Print Results, which will print the list of Employees that were returned on the search

 = Export Results, with the options of exporting to an Excel or CVS file

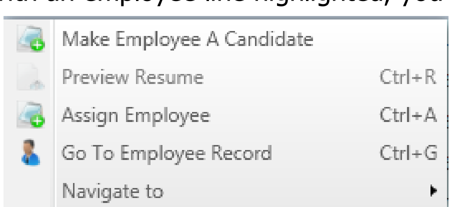
 = Preview the selected (highlighted) employee's resume

 = Place selected employees (those highlighted) as candidates for this order

 = View the selected employee's record

 = Assign the selected employees

With an employee line highlighted, you also have a number of options by right clicking on the employee, seen here.



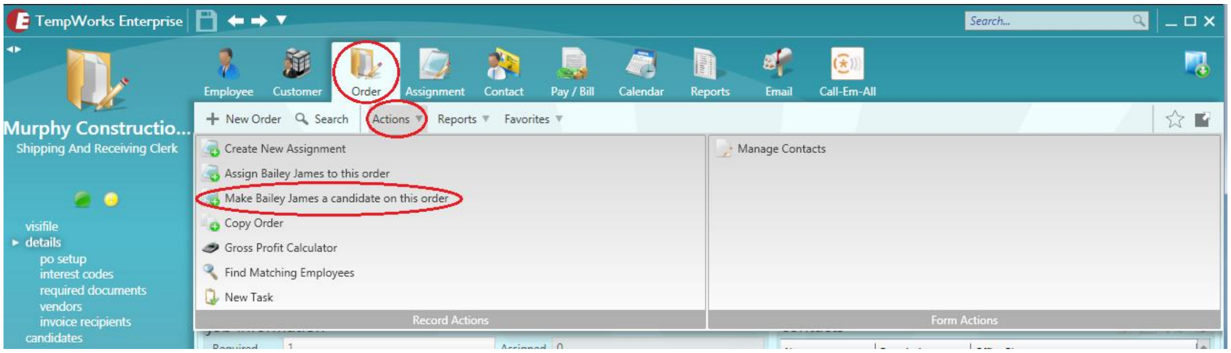
The *Navigate to* option allows for you to navigate to a specific area within the employee record without having to open the employee record to get to the screen you want to view.

From the search results you also have the ability to select multiple **Employees** at the same time to attach as candidates. You can do this by either;

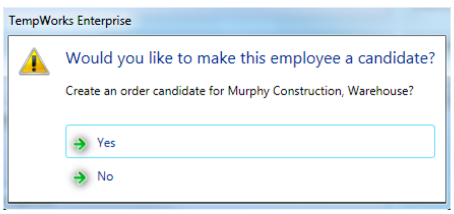
- Using the Control (*Ctrl*) button on your keyboard while clicking on the line for each **Employee**.
- Using the *Shift* button on your keyboard and selecting a group of people by holding down the *Shift* key and selecting the top and bottom line of the group you want to add.

3. From the Order record in the Actions dropdown

Employees can also be added as *Candidates* to an **Order** by utilizing the *Actions* dropdown menu within the **Order** record, as seen below. Note: The **Employee** record <u>must</u> be pulled up in the **Employee** record area for this option to be available.



Selecting *Make employee name a candidate on this order* will display a prompt similar to the one below.

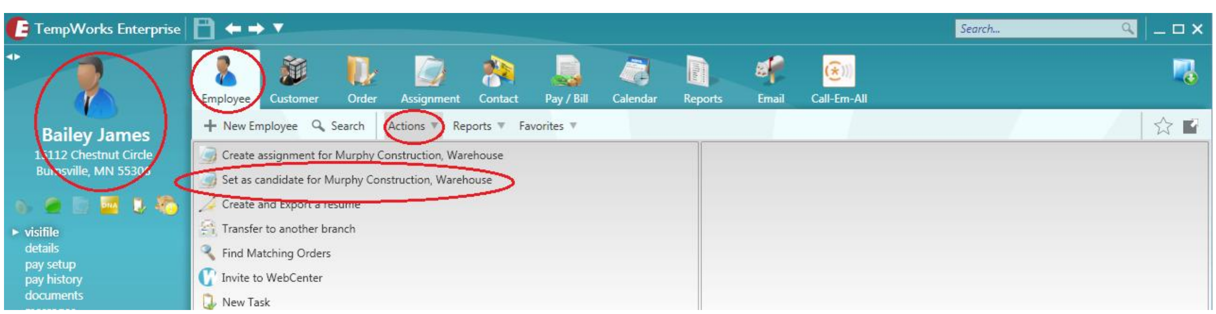


Selecting *Yes* will place the employee as a candidate on the order, and within the *candidates* area of the **Order**. A prompt will be displayed confirming that the employee was placed as a candidate. Simply select *continue working*. You will remain on the same record you were on.

Selecting *No* will bring you back to the **Order** record without have placing the employee as a *candidate.*

4. From the Employee record in the Actions dropdown

From within an **Employee** record you can add that **Employee** as an **Order** *candidate* as well. To do so, open the **Employee** record and from the *Actions* dropdown select *Set as candidate for insert order open Customer name and department here,* as seen circled in red below. Note: The **Order** record <u>must</u> be open in the **Order** record area for this option to be available.



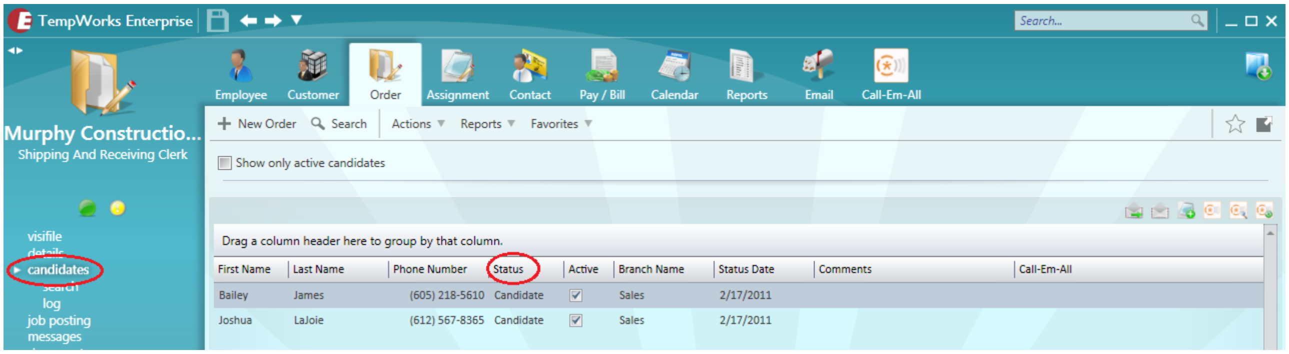
Selecting the *Set as candidate for Customer Name, Department* will provide you will the following prompt similar to that mention above.

Selecting *Yes* will place the employee as a candidate on the order, and within the *candidates* are of the **Order.** A prompt will be displayed confirming that the employee was placed as a candidate. Simply select *continue working*. You will remain on the same record you were on.

Selecting *No* will bring you back to the **Employee** record without having placed the employee as a candidate to the **Order.**

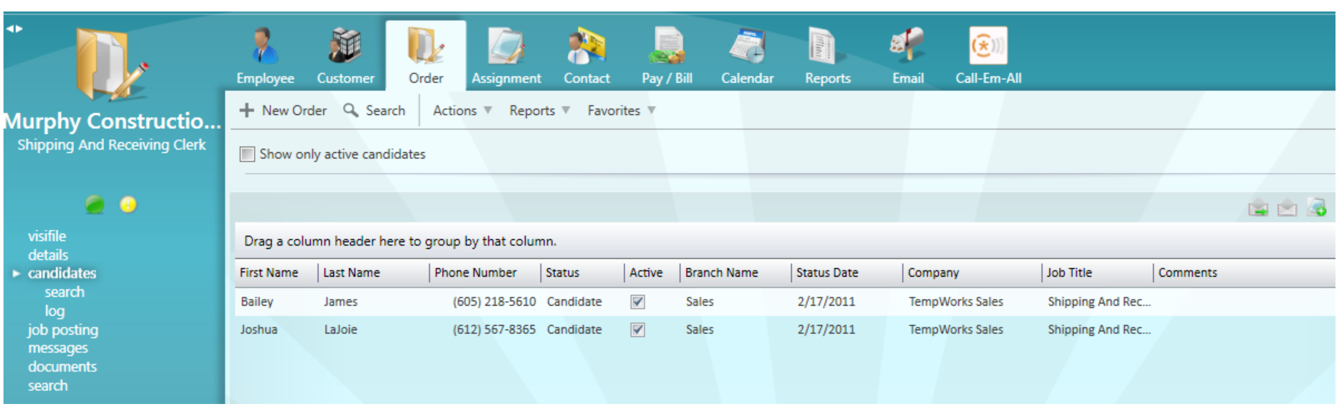
<u>Candidate Tracking</u>

Adding candidates to the **Order** logs a ***Message*** record on the **Order**, **Customer**, **Employee** and *Supervisor* **Contact** records automatically. Once **Employees** have been attached as candidates to the **Order**, by using one of the methods described above, they will be displayed in the *candidates* form of the **Order** with an initial *Status* of "Candidate".



Within the *candidates* area of the **Order** you can track the current *Status* of the candidate as you work to fill the **Order**. Information from this area also populates in the **Employee's** record within the *Details/Candidacy* form. Any changes to the *Status* of a candidate in this form will also log a ***Message*** to the **Order**, **Customer**, **Employee** and *Supervisor* **Contact**.

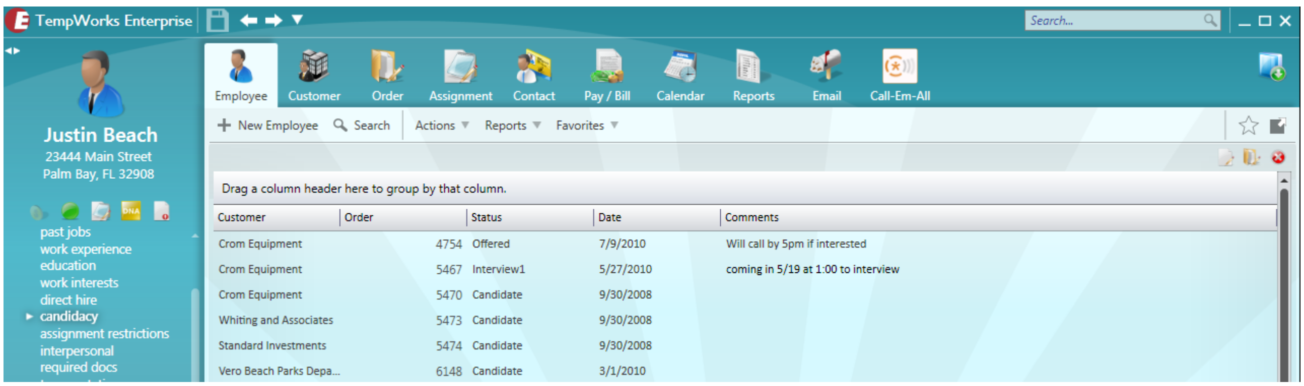
If the **Employee** submits themselves to the **Order** via the WebCenter Job Board or if a **Vendor Contact** submits a subcontractor via the WebCenter Vendor Portal their initial *Status* in the **Order Candidates** form will be "WCandidate" (web candidate) or "VCandidate" (vendor candidate), respectively. (Integration with the WebCenter Portals will be covered in a separate document.) *Note – The WebCenter Job Board and Vendor Portals are ancillary products that are not included with the "core" Enterprise software. Please contact a TempWorks representative for more information about these web solutions.



Once candidates have been added to the **Order** they will be listed in the **Order Candidates** form as shown above. The check mark in the *Active* column indicates that the **Employee** is an "Active" candidate on the **Order**; it does <u>not</u> refer to their **Employee** record "Active" status. The *Status Date* column refers to the last day that the **Employee's** *Status* was updated for this **Order**. The *Company* column reflects the staffing company the **Employee** is associated with. If the **Employee** is a subcontractor the *Company* column will display the name of the **Vendor** that they work for.

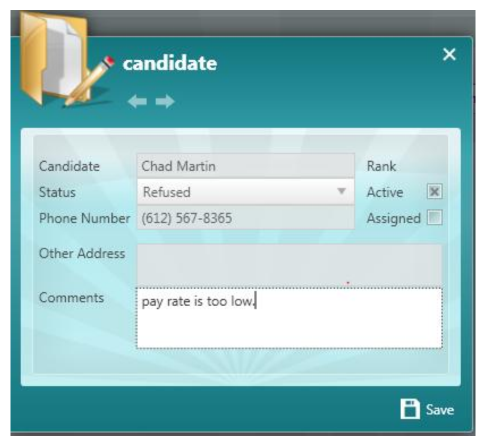
When **Employees** are added as candidates to the **Order** Enterprise automatically logs a ***Message*** which is automatically linked to the **Order**, **Customer**, **Employee**, and *Supervisor* **Contact** record (if a *Supervisor* is attached to the **Order**). The text of the message indicates the candidates initial *Status* on the **Order**, their name, the *Order ID*, and the **Customer** name. You can edit the ***Message*** text to include additional information about the generic ***Message*** that was logged by double clicking on the message in the *messages* area on any of linked records.

When an **Employee** is attached to the **Order** *Candidates* form, the **Order** information will also be added to the **Employee** *Details/Candidacy* form. This form will list the *Customer*, *Order*, the candidate's *Status* and the last *Date* that the *Status* was updated, as well as any *Comments* that have been logged. An example of the Employee candidacy record is seen here.

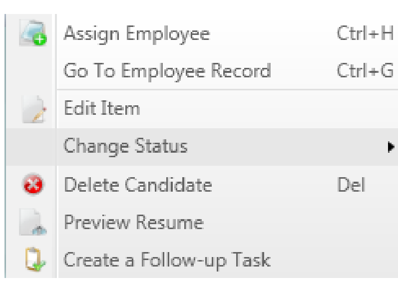


When a candidate's status changes on the order, you can edit that status directly from the order within the *candidate* area. If utilized correctly this allows you to see the current status of each candidate in a glance at any given time. There are two ways to change the status of a candidate on the **Order** from the *candidate* form;

1. Double click on the line of the candidate (employee) to be edited. This will bring you to the following form seen on the right.
   From here, by utilizing the status dropdown, you can change the status of the selected candidate, and include any additional comments.



2. Right click on the candidate (employee) line item that you wish to change/edit. Right clicking will display the options seen below;



Selecting *Edit Item* will bring you to the same popup form as option number one, where you are able to change the status and enter comments.

Selecting *Change Status* from this area will present you with a list of statuses which you can select from.

Note: Using the *Change Status* option does not allow you to add comments.

Right clicking on a candidate line will also enable you to *Assign Employee, Go to Employee Record, Delete Candidate, Preview Resume,* and *Create a Follow-up Task.*

Assign Employee: Creates an assignment of this order and candidate (employee) selected.

Go To Employee Record: Navigates you to the Employee record of the candidate you have selected.

Delete Candidate: Removes the selected candidate from the candidate area of the Order. Note: This does not log a message on any record; it simply removes them from the Order, including the candidate log area.

Preview Resume: If the selected candidate has a resume attached to their record, selecting this option will display their resume allowing you to preview it at a glance, without having to navigate into their record.

Create a Follow-up Task: Brings up a new Task form with will link the **Order** and **Employee** record.

Note: Changing a candidate's status to either rejected or removed with remove them from the candidates list as they are no longer active candidates. They will, however, still remain in the candidate log.

When changing a candidate's status, there are a number of different status' to choose from. It is recommended that branch staff use the options similarly so that any staff member can understand the status of candidates on each order. A *Status* of "Submitted" can be used to indicate that the **Employee's** resume has been sent to the *Supervisor* or *Hiring Manager*. *Statuses* of "Interview", "Interview1" and "Interview2" can be used for tracking the interview process of candidates on this **Order**. If the **Employee** is offered the job you can change the *Status* to "Offered" and put in the details of the offer in the ***Message*** that is logged.

Once **Employees** have been attached to the **Order** *candidates* form there are several functions that can be used. In the upper right of the *candidates* form are three options; 

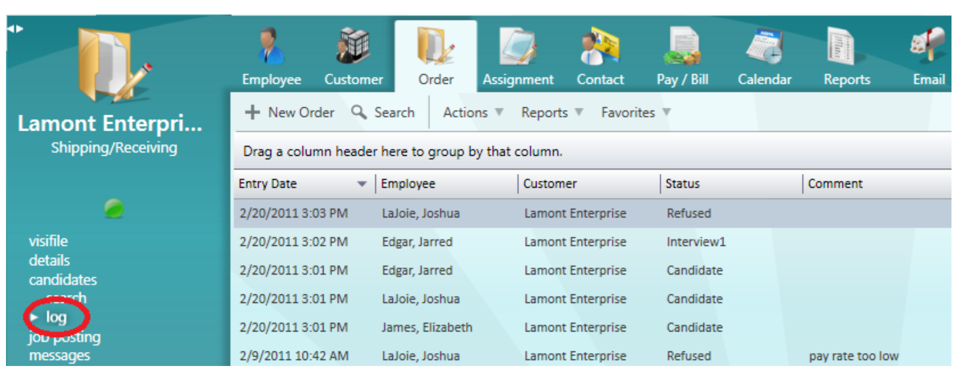
 = Submit resumes of the candidates, via email, to the *Supervisor* or *Hiring Manager*.

 = Email selected candidates, with order details (generated by an email template).

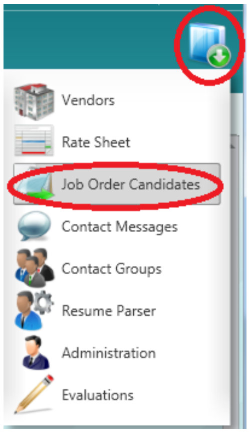
 = Assign the candidate to the **Order** by selecting the desired candidates line item and the clicking this button.

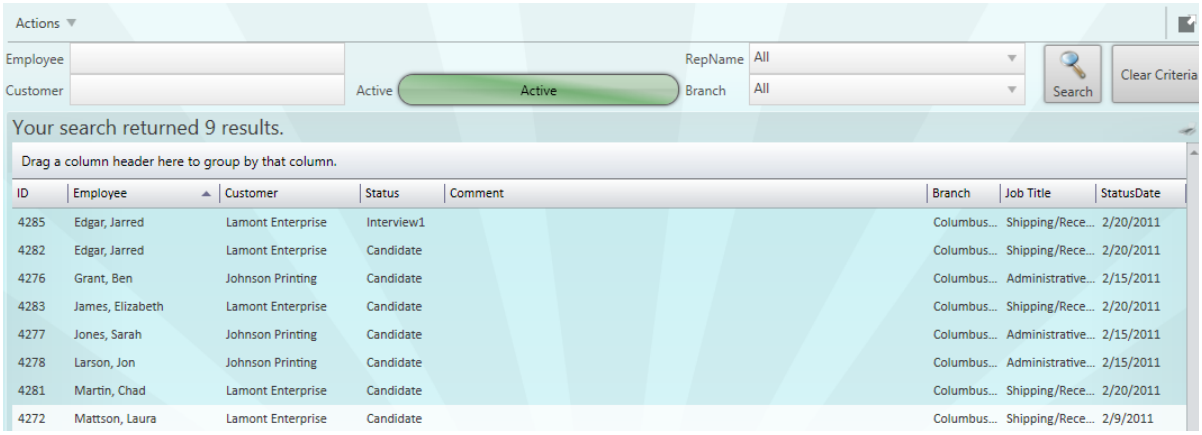
*For more information on submitting **Employee** resumes via ***Email*** refer to the [15R Submitting Resumes Help Document]. For more information on creating and utilzing email tempaltes, please refer to the [15R Email Functionality and Integration Help Document]. For more information about **Tasks** refer to the [14R Task Management Help Document].

The **Order Candidates**/***Log*** form displays a list of all changes that have been made to the *Status* or the *Comment* field of the **Candidates** form. Although no actions can be taken from this form it is a good reference area to be able to quickly see all of the progress that has been made in filling the **Order**.



The **Job Candidates** form displays a list of the current *Status* of every **Employee** that is attached to an **Order** as a *candidate*. You can use the *Employee*, *Customer*, *Active*, *RepName*, and *Branch* fields at the top and click *Search* to filter for those candidates that you want to view. Click on the button in the upper right to print out the results list.





To open the **Job Candidates** form, select **All Options** from the menu in the lower left and then click on *Job Candidates*.

Right- click on the selected line to view a menu that includes *View Employee* (navigate to **Employee** record), *View Order* (navigate to **Order** record), and *Edit Item* (open the ***candidate*** form as discussed earlier in this document to change status and add comments).

Still Have Questions?

For more information about candidate tracking contact our customer support group at 651.452.0366 or by sending an email to support@tempworks.com.

To schedule training on candidate tracking, submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact the training department at trainers@tempworks.com.

