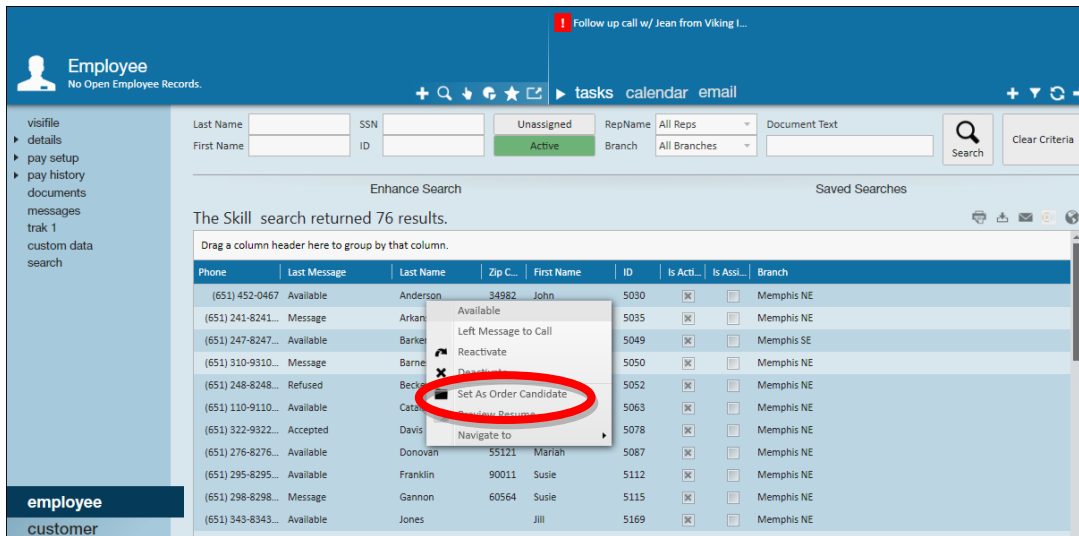
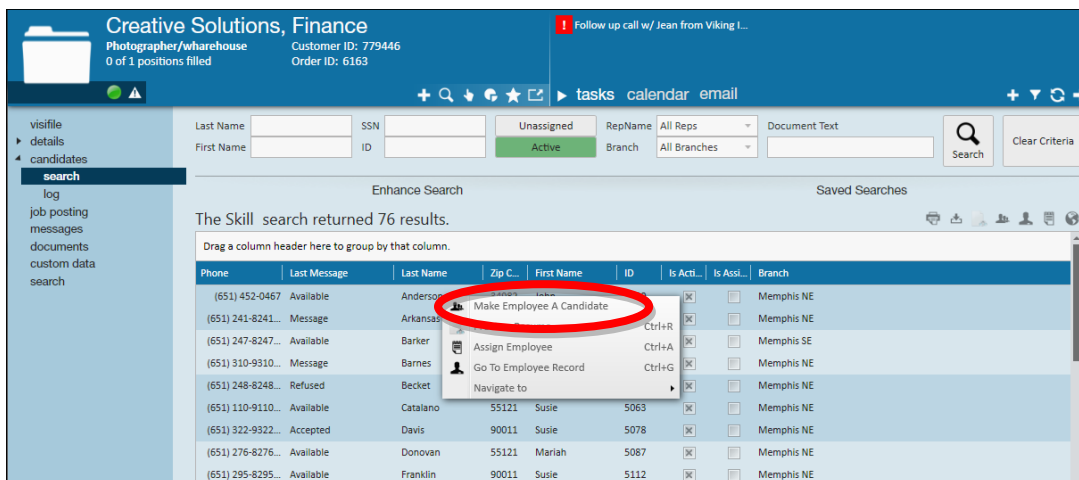



15R1 Enterprise Candidate Tracking

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**. There are several ways to attach candidates to an **Order**. From the **Employee Search** results select individual **Employees** (hold *Ctrl* while clicking) or a group of **Employees** (select the first line then 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's currently open in the **Order** area.



Candidates can also be added to the **Order** by opening the **Candidates/Search** form and selecting the **Employees** (as mentioned above) then right-click to display the menu and select *Make Employee A Candidate* or click on the  button in the upper right.

Creative Solutions, Finance
Photographer/warehouse
0 of 1 positions filled
Customer ID: 779446
Order ID: 6163

Follow up call w/ Jean from Viking I...

tasks calendar email

Create New Assignment
Assign David Parker to this Order
Make David Parker a candidate on this order
Copy Order
Gross Profit Calculator
Find Matching Employees
View Map
New Task

Record Actions	Form Actions
Curtis Dunne (651) 592-3111	Candidate <input checked="" type="checkbox"/>
Rhonda Jamison (651) 206-1965	Candidate <input checked="" type="checkbox"/>
Lindsay Ramirez (651) 287-8370	Candidate <input checked="" type="checkbox"/>

Branch Name	Status Date	Company	Comments	Call-Em-At
Memphis SE	10/29/2010	High Tech Staffing		1 - Live An
Memphis SE	10/29/2010	High Tech Staffing		- Voicema
Memphis SE	10/29/2010	High Tech Staffing		- Voicema
Memphis SE	10/29/2010	High Tech Staffing		Duplicate
Memphis SE	10/29/2010	High Tech Staffing		Duplicate
Memphis SE	10/29/2010	High Tech Staffing		Duplicate

If an **Employee** record is open in the **Employee** area click on the **Order** menu and select *Make [Employee Name] a Candidate on this Order* and select *Yes* when the “Would you like to make this employee a candidate?” prompt appears.

David C Parker
5037 Vincent Avenue South
Blaine, MN 55432
ID: 12647
SSN: xxx-xx-8442

Follow up call w/ Jean from Viking I...

tasks calendar email

Create assignment for Creative Solutions, Finance
Set as candidate for Creative Solutions, Finance
Create assignment for Creative Solutions, Finance
Transfer to another branch
Find Matching Orders
View Map
Manage WebCenter Account
New Task
Copy Employee to Contact

Resume Received
 I9 On File
 Active
 Assigned

phone/email
(555) 555-4422
(612) 834-2765
imapdummyaccount@gmail.com
(612) 822-2800

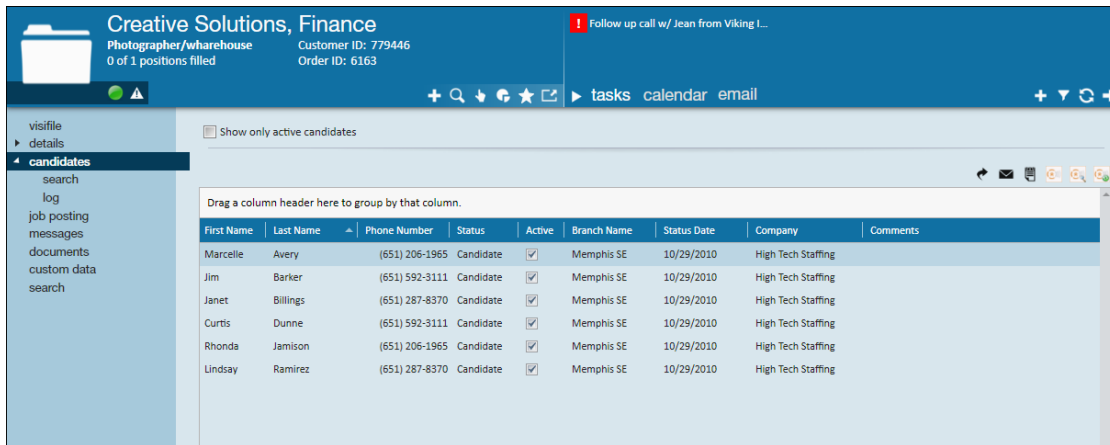
Rep	Contact	Due
5826 - ZZJuno Inc...	alisha	

12/21/2009 WebMessage You have not been on assignment within the past 30 days, y... tim
4/20/2009 Order Candidate Candidate -- Parker, David OrderID: 4365 - Crom Equipme... erica

If an **Order** record is open in the **Order** area click on the **Employee** menu and select *Set as Candidate for [Customer Name, Department Name]* and select *Yes* when the “Would you like to make this employee a candidate?” prompt appears.

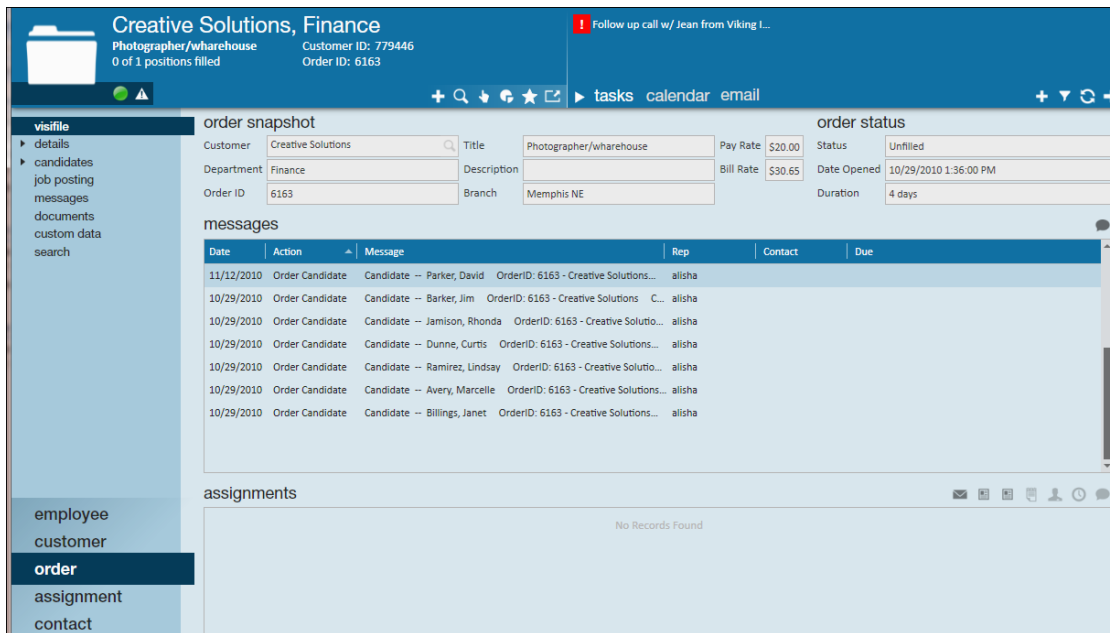
Once **Employees** have been attached as candidates to the **Order** (using one or more of the methods above) they will be displayed with an initial *Status* of “Candidate” in the **Order Candidates** form. If the **Employee** submits themselves to the **Order** via the WebCenter Job Board or if a **Vendor 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 not 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.

**Note – If the Phone Number column is blank the Employee does not have a Contact Method with a Contact Type of "Phone" listed on their record. Only the "Phone" Contact Method will be displayed in the Phone Number column in this form.*



When **Employees** are added as candidates to the **Order** Enterprise automatically logs a *Message* with an *Action* code of "Order Candidate" and the text indicates their initial *Status* on the **Order**, their name, the *Order ID*, and the **Customer** name. This *Message* is automatically linked to the **Order**, **Customer**, **Employee**, and *Supervisor* **Contact** record (if a *Supervisor* is attached to the **Order**).

Marcelle Avery
ID: 16195
TN SSN: xxx-xx-6845




Follow up call w/ Jean from Viking I...

tasks calendar email

visifile
details
contact methods
past jobs
work experience
education
work interests
candidacy
employment restrictions
interpersonal
required docs

Drag a column header here to group by that column.

Customer	Order	Status	Date	Comments
Creative Solutions	6164	Candidate	11/10/2010	
Creative Solutions	6163	Candidate	10/29/2010	
Douglas Machine	5993	Candidate	6/25/2010	
Oncology	2250	Candidate	12/30/2009	
Crom Equipment	4365	Candidate	4/20/2009	

When an **Employee** is attached to the **Order Candidates** form, the **Order** information will 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. To edit the candidate's information on the **Order** from the **Candidacy** form, select the line of the **Order** to be edited and then click on the  button in the upper right. Clicking on the  button will navigate the user to the appropriate **Order**. Clicking on the  button will delete the **Employee** as a candidate on the selected **Order**.

Creative Solutions, Finance
Photographer/warehouse
0 of 1 positions filled
Customer ID: 779446
Order ID: 6163

Follow up call w/ Jean from Viking I...





tasks calendar email

visifile
details
candidates
search
log
job posting
messages
documents
custom data
search

Show only active candidates

Drag a column header here to group by that column.

First Name	Last Name	Phone Number	Status	Active	Branch Name	Status Date	Company	Comments
Marcelle	Avery	(651) 206-1965	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Jim	Barker	(651) 592-3111	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Janet	Billings	(651) 287-8370	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Curtis	Dunne	(651) 592-3111	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Rhonda	Jamison	(651) 206-1965	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
David	Parker	(612) 822-2800	Candidate	<input checked="" type="checkbox"/>	Memphis NE	11/12/2010	High Tech Staffing	
Lindsay	Ramirez	(651) 287-8370	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	

Once **Employees** have been attached to the **Order Candidates** form there are several functions that can be used. You can submit resumes to the *Supervisor* or *Hiring Manager* by clicking on the  button. The **Order Details** can be *Emailed* to the candidates by clicking on the  button. The candidate can be assigned to the **Order** by selecting their line and clicking on the  button. A Call-Em-All broadcast can be sent by selecting the candidates and using the  button in the upper right.

***Note – For more information on submitting **Employee** resumes via *Email* refer to the [15R1 Enterprise Submitting Resumes](#) help document. For more information on using the **Order** Call-Em-All Integration refer to the [15R1 Enterprise Call-Em-All Integration](#) help document.**

visifile
details
candidates
search
log
job posting
messages
documents
custom data
search

employee
customer
order

Follow up call w/ Jean from Viking L...

tasks calendar email

Show only active candidates

Drag a column header here to group by that column.

First Name	Last Name	Phone Number	Status	Active	Branch Name	Status Date	Company	Comments
Marcelle	Avery	(651) 206-1965	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Jim	Barker	(651) 592-3111	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Janet	Billings	(651) 287-8370	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Curtis	Dunne	(651) 592-3111	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Rhonda	Jamison	(651) 206-1965	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
David	Parker	(612) 822-2800	Candidate	<input checked="" type="checkbox"/>	Memphis NE	11/12/2010	High Tech Staffing	
Lindsay	Ramirez	(651) 287-8370	Candidate	<input checked="" type="checkbox"/>	Memphis SE	10/29/2010	High Tech Staffing	
Renee	Simpson				Memphis NE	11/15/2010	High Tech Staffing	

Assign Employee Ctrl+H
Go To Employee Record Ctrl+G
Edit Item
Change Status
Delete Candidate Del
Preview Resume
Create a Follow-up Task

To access additional functions in the **Order Candidates** form, right-click on the **Employee's** line to display a menu like the one above. You can select to *Assign Employee*, *Go To Employee Record*, *Edit Item*, *Change Status*, *Delete Candidate* (removes the **Employee** from the **Candidates** form and updates the corresponding records so it looks as if the **Employee** was never added as a candidate), *Preview Resume*, and *Create a Follow-up Task*.

Selecting *Assign Employee* from the menu above will bring up a prompt that says "Do you want to create an assignment?" click *Create the Assignment* to assign the **Employee** to the **Order**. This will also log a *Message* with an *Action* of "Placed" and will remove the **Employee** from the **Candidates** form as they are no longer a candidate once the **Assignment** has been created. Choosing *Go To Employee Record* will navigate the user to the **Employee's Visifile**. From the **Employee's** record you can open additional forms to determine if they are a good fit for this **Order**.

candidate

Candidate: Jim Barker Rank: 1

Status: Submitted Active:

Phone Number: 6515923111 Assigned:

Other Address:

Comments: lacks in one skill, but has tons of experience

Save

When *Edit Item* is selected from the right-click menu in the **Order Candidates** form the [edit] *Candidate* form to the left is opened. In this form you can change the **Employee's Status** on the **Order**, you can add a *Rank* to be used within this **Order**, you can add notes in the *Comments* field and you can see if the **Employee** is currently *Assigned*. If you make any changes to this form, click *Save* in the lower right to close the form and update the **Order** with this information.

Show only active candidates

Drag a column header here to group by that column.

First Name	Last Name	Phone Number	Status	Active	Rank	Branch Name	Status Date	Company	Comments
Marcelle	Avery	(651) 206-1965	Candidate	<input checked="" type="checkbox"/>		Memphis SE	10/29/2010	High Tech Staffing	
Jim	Barker	(651) 592-3111	Submitted	<input checked="" type="checkbox"/>	1	Memphis SE	11/15/2010	High Tech Staffing	lacks in one skill, but has tons of exper...
Janet	Billings	(651) 287-8370	Candidate	<input checked="" type="checkbox"/>		Memphis SE	10/29/2010	High Tech Staffing	
Curtis	Dunne	(651) 592-3111	Candidate	<input checked="" type="checkbox"/>		Memphis SE	10/29/2010	High Tech Staffing	
Rhonda	Jamison	(651) 206-1965	Candidate	<input checked="" type="checkbox"/>		Memphis SE	10/29/2010	High Tech Staffing	
Lindsay	Ramirez	(651) 287-8370	Candidate	<input checked="" type="checkbox"/>		Memphis SE	10/29/2010	High Tech Staffing	

The *Rank* column can be used to indicate a list of priorities of who your top candidates are or it can be used for organizing which user will be contacting the **Employee** if multiple staffing specialists are working on filling the same **Order**. The *Comments* field is used within the **Order** to display additional details about the candidate that you would want other users viewing this form to know or for your own personal notes on the **Employee**.

*Note – Adding *Comments* to the candidate will automatically log a *Message* with an *Action* of “Order Candidate” and will include the *Comments* that were added in the *Message* text section.

Drag a column header here to group by that column.

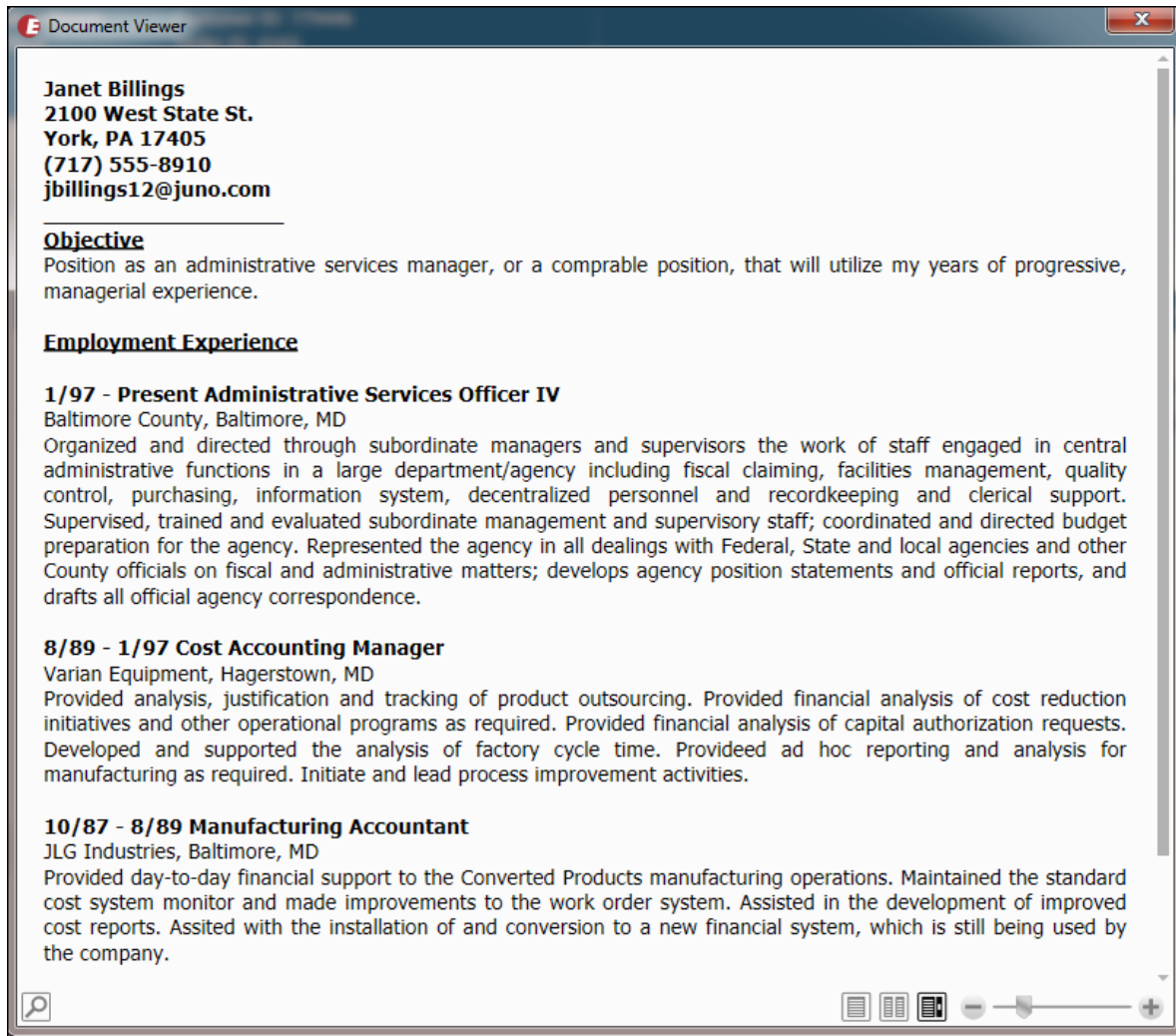
First Name	Last Name	Phone Number	Status	Active	Rank	Branch Name	Status Date	Company	Comments
Marcelle	Avery					Memphis SE	10/29/2010	High Tech Staffing	
Jim	Barker				1	Memphis SE	11/15/2010	High Tech Staffing	lacks in one skill, but has tons of exper...
Janet	Billings				1	Memphis SE	10/29/2010	High Tech Staffing	Has all necessary skills, lacking a little i...
Curtis	Dunne						2010	High Tech Staffing	
Rhonda	Jamison						2010	High Tech Staffing	
Lindsay	Ramirez						2010	High Tech Staffing	

- Assign Employee Ctrl+H
- Go To Employee Record Ctrl+G
- Edit Item
- Change Status
 - Accepted
 - Approved
 - Candidate
 - Extend
 - Interview
 - Interview1
 - Interview2
 - MoreInfo
 - Offered
 - PendingBC
 - Placed
 - Present
 - Refused
 - Rejected
 - Removed
 - Sendout
 - SubIntView
 - Submitted
 - VCandidate
 - WCandidate
- Delete Candidate Del
- Preview Resume
- Create a Follow-up Task

When *Change Status* is selected the menu expands to give you the different *Status* options you can choose. The options for “Refused”, “Rejected” or “Removed” will remove the check mark from the *Active* column for that **Employee**. If the check box for *Show Only Active Candidates* is checked off, the names of “Refused”, “Rejected” and “Removed” **Employees** will disappear.

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.



When *Preview Resume* is selected from the right-click menu on the **Order Candidates** form the Document Viewer (above) displays a copy of the first "Resume" listed on the **Employee's** record in the **Documents** area.

*Note – If the **Employee** does not have a document with a *Type* of "Resume" attached in the **Documents** form of their record then *Preview Resume* will be grayed out and if it's still selected it will bring up a prompt that indicates "No resume was found for the selected employee". Click *Continue Working* to close the prompt.

If you select *Create a Follow-up Task* from the right-click menu the **Task Details** form to the left will open. Add the *Subject* and a *Due* date and time.

The **Task** will automatically be linked to the **Employee** and **Order** records. Once the information has been entered click *Save* in the lower right to update Enterprise.

*Note – For more information about **Tasks** refer to the [15R1 Enterprise Task Management](#) help document.

Entry Date	Employee	Customer	Status	Comment
11/15/2010 1:31 PM	Ramirez, Lindsay	Creative Solutions	Removed	
11/15/2010 1:29 PM	Avery, Marcelle	Creative Solutions	Submitted	
11/15/2010 11:16 AM	Billings, Janet	Creative Solutions	Candidate	Has all necessary skills, lacking a little in experience
11/15/2010 10:59 AM	Barker, Jim	Creative Solutions	Submitted	lacks in one skill, but has tons of experience
10/29/2010 1:37 PM	Billings, Janet	Creative Solutions	Candidate	
10/29/2010 1:37 PM	Avery, Marcelle	Creative Solutions	Candidate	
10/29/2010 1:37 PM	Ramirez, Lindsay	Creative Solutions	Candidate	
10/29/2010 1:37 PM	Dunne, Curtis	Creative Solutions	Candidate	
10/29/2010 1:37 PM	Jamison, Rhonda	Creative Solutions	Candidate	
10/29/2010 1:37 PM	Barker, Jim	Creative Solutions	Candidate	

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**.

visifile
details
candidates
messages
custom data
search

Filter by Action Code: [dropdown]
Drag a column header here to group by that column.

Action	Date Entered	Message	Entered By	Due Date	Complete	Date Completed
Removed	11/15/2010 1:31 PM	Removed -- Ramirez, Lindsay OrderID: 6163 - Creative Solutions Comments:	alisha			
Submitted	11/15/2010 1:29 PM	Submitted -- Avery, Marcelle OrderID: 6163 - Creative Solutions Comments:	alisha			
Order Candidate	11/15/2010 11:16 AM	Candidate -- Billings, Janet OrderID: 6163 - Creative Solutions Comments: Has all necessary skills, lacking a little in experience	alisha			
Placed	11/15/2010 11:07 AM	Placed -- Parker, David OrderID: 6163 - Creative Solutions Comments:	alisha			

Whenever an **Employee** is attached to an **Order** as a “Candidate” a *Message* is logged to the **Order**, **Employee**, **Customer** and *Supervisor Contact* records. This also occurs when the **Employee’s Status** is changed in the **Candidates** form or when the *Comments* field is populated from the [edit] *Candidate* form.

message

Action: Placed

Placed - is scheduled for orientation on 11-17-10 - Parker, David OrderID: 6163 - Creative Solutions Comments:

details

Date/Time: 11/15/2010 11:07:00 AM
Rep Name: alisha
Link Employee: [empty]
Link Contact: [empty]
Link Order: 6163
Link Assignment: [empty]

follow-up

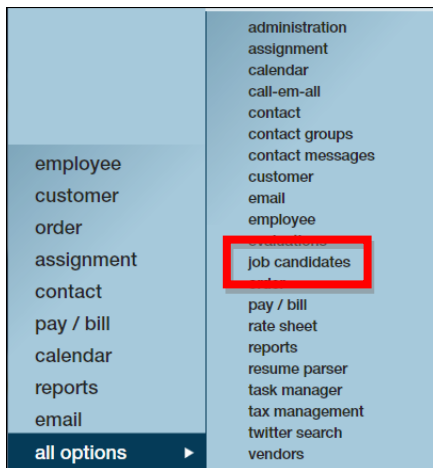
There are currently no follow-up items for this message.

create a task
 schedule an appointment

Save


Double-click on the *Message* to open the form to the left. You can edit the *Message* text to include additional information about the generic *Message* that was logged.

*Note – Refer to the **Messages** chapter of the [15R1 Enterprise Front Office Training Manual](#) for more information on this function.



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

ID	Employee	Customer	Status	Comment	Branch	Job Title	StatusDate
2738	12R8 Test Auth, 38	Douglas Machine	Candidate		Memphis SE	Unknown	6/25/2010
1593	2nd Staffing, 2nd Staffing	CBS	WCandidate		Memphis...	Accountant	8/14/2009
1621	2nd Staffing, 2nd Staffing	ABC 123	Candidate		Memphis...	Unknown	10/26/2009
1622	4, Avatar Test	ABC 123	Candidate		Memphis SE	Unknown	10/26/2009
2244	4, Avatar Test	Oncology	Candidate		Memphis SE	C#	12/30/2009
1551	Aardson, Steve	Crom Equipment	Candidate		Memphis...	Forklift	7/11/2009
1550	Aardson, Steve	ZZFavorites	Candidate		Memphis...	Forklift	7/11/2009
1078	Aardson, Steve	123 Nursing	Candidate		Memphis...	Unknown	2/23/2009
1060	Aardson, Steve	123 Nursing	Candidate		Memphis...	Unknown	12/23/2008
1502	Aardson, Steve	A-Z Excavating	Candidate		Memphis...	Unknown	6/22/2009

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.

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 [edit] *Candidate* form as discussed earlier in this document).

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 our Training Department at trainers@tempworks.com.