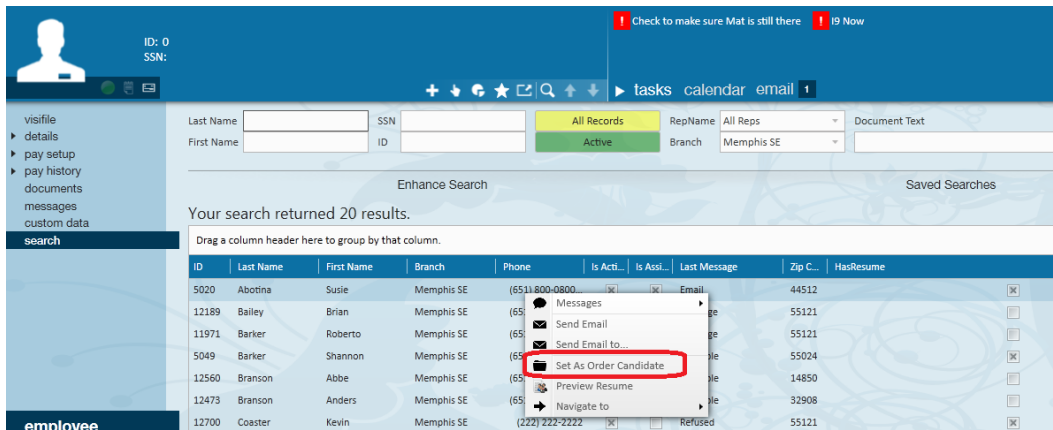
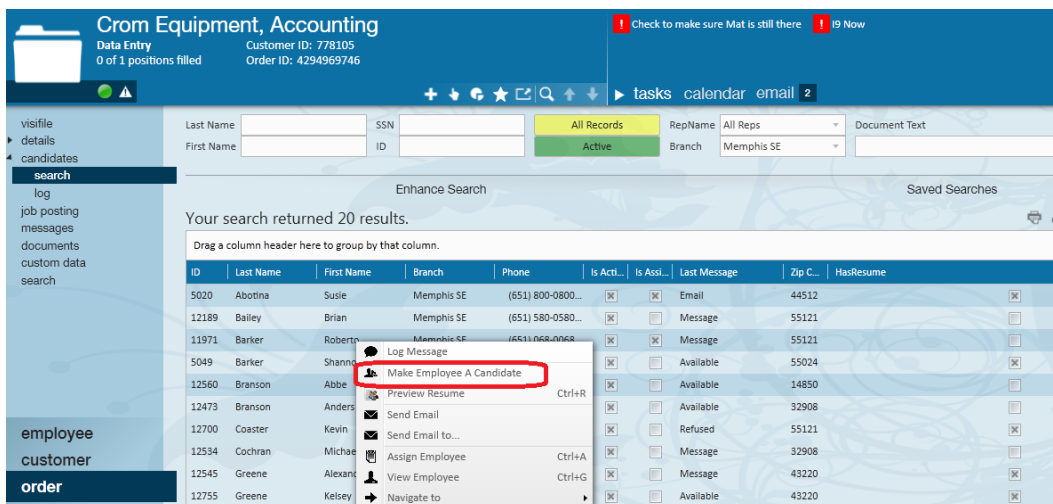



## 16R1 Enterprise Candidate Tracking with WebCenter

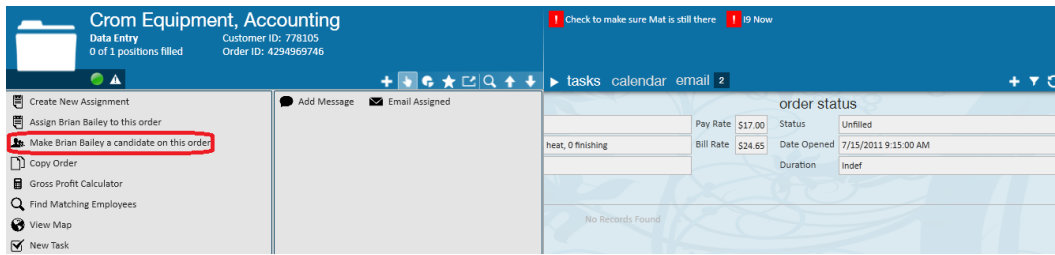
The Enterprise **Order Candidates** form allows the user to easily track the *Status* of each Employee as they [the user] work to fill the **Order**. There are several ways to attach candidates to an **Order**. From the **Employee Search** results select individual Employees (hold *Ctrl* while clicking) 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:




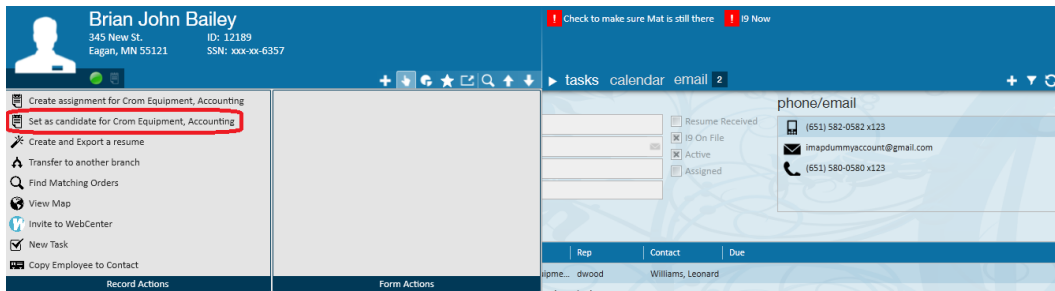
To add the selected Employees to the **Order Candidates** form select *Set As Order Candidate* from the menu. They will then be added as candidates to the **Order** that's currently open in the **Order** area.




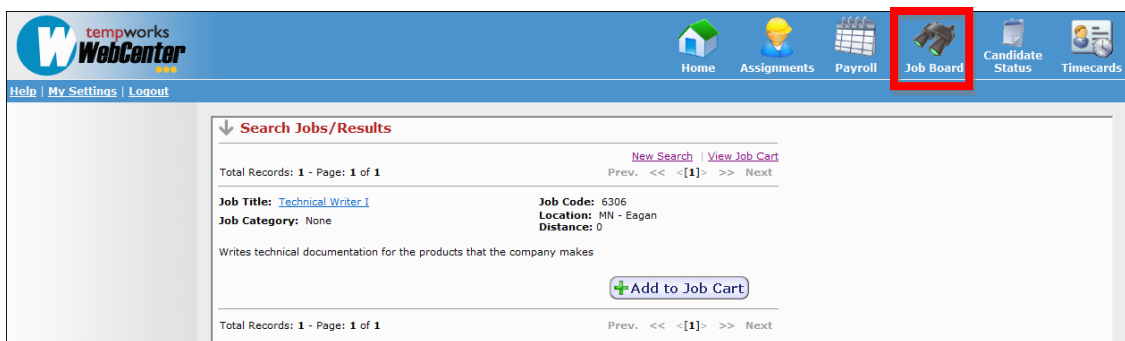
**Candidates** can also be added to the **Order** by opening the **Order Candidates/Search** form and selecting the **Employees** (as mentioned above) then right-click to display the menu and select *Make Employee A Candidate* or click on the  button in the upper right.



If an **Employee** record is open in the **Avatar** 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.



If an **Order** record is open in the **Avatar** area click the **Actions**  button 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.



From the **WebCenter Job Board** the Employee (or applicant) can search on available jobs on the **Job Board** page and add the job to their job cart. After adding the job to the cart they click on [View Job Cart](#) to continue the submission process.

tempworks WebCenter

Home Assignments Payroll Job Board Candidate Status Timecards

Help | My Settings | Logout

### Job Cart

This page shows all positions in your job cart. [Search Jobs](#)

- To view a position in detail, click the job title.
- To remove a job title or submit a resume to a specific position, select the corresponding check box.
- To select all positions in your job cart, choose the Select All button.
- To deselect all positions in your job cart, choose the Deselect All button.

Select All  Select None

Job Title: [Technical Writer I](#) Job Code: 6306  
Job Category: None Location: MN - Eagan  
Writes technical documentation for the products that the company makes

Select All  Select None

Once they have added all of the jobs that they want to apply for to their *job cart* they will click on the button for *Submit Job Cart*. The next page will indicate that they have been successfully submitted to the job(s).

tempworks WebCenter

Home Assignments Payroll Job Board Candidate Status Timecards

Help | My Settings | Logout

### Current Candidate Status

Job Number	Job Title	Candidate Status	Status Description
6306	Technical Writer	WCandidate	Web applicant is being considered as a candidate for this order

### Jobs that have been refused.

Job Number	Job Title
No jobs found	

### Jobs that have been filled.

Job Number	Job Title
No jobs found	

In the **Candidate Status** page they can view their current *Status* on all jobs that they have submitted themselves to and they can also select to refuse jobs that they're currently being considered for.

Crom Equipment, Accounting

Data Entry Customer ID: 778105  
0 of 1 positions filled Order ID: 4294969746

Check to make sure Mat is still there 19 Now

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	Comments	Has Resume
Susie	Abotina	(651) 800-0800 x123	WCandidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011		<input checked="" type="checkbox"/>
Mathew	Marshall	(651) 222-9786	Candidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011		<input checked="" type="checkbox"/>
William	Nolan	(651) 540-1540 x123	Candidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011		<input type="checkbox"/>

Once the Employee has submitted themselves to the Order via the WebCenter Job Board their initial *Status* in the **Order Candidates** form will be "WCandidate" (web candidate) shown above.

**Customer Information**

**Company:** Creative Solutions  
**Department:** Primary  
**Worksite:** **Name:** Corporate Office  
**Attn To:**  
**Street:** 5847 4th St. W.  
**Street 2:**  
**County:**  
**City:** Eagan  
**State, Zip:** MN, 55121

**Directions:**

**Job Information**

**Order Type:** TE  
**No. Required:** 3  
**Vendor Pay Rate:** \$22.00  
**Job Title:** Technical Writer  
**Job Description:** Writes technical documentation for the products that the company makes  
**Dress Code:**  
**Safety Notes:**

**Times**

**Start Date:** 11/29/2010  
**Shift:** 1  
**Start Time:** 8:00 AM  
**End Time:** 4:00 PM  
**Duration:** 8 weeks

**People**

**Supervisor:**  
**Report To:**  
**Ordered By:**

**Other Information**

**Order Number:** 6306  
**Order Status:** Unfilled  
**Taken By:** alisha  
**Order Date:** 11/16/2010  
**PO Number:**

Name	Status	Date Added	Pay Rate
Edwards, Aaron	VCandidate	11/16/2010	0
Fredrick, Jill	VCandidate	11/16/2010	0
Hawkins, Katie	VCandidate	11/16/2010	0

When a Vendor Contact accepts an Order that has been distributed to them via the WebCenter Vendor Portal they can add Employees or submit Employees that have already been added (by their company) to your Enterprise database. When Employees have been submitted the details for the Order will look like that above.

**Crom Equipment, Accounting**  
 Data Entry Customer ID: 778105  
 0 of 1 positions filled Order ID: 4294969746

tasks calendar email

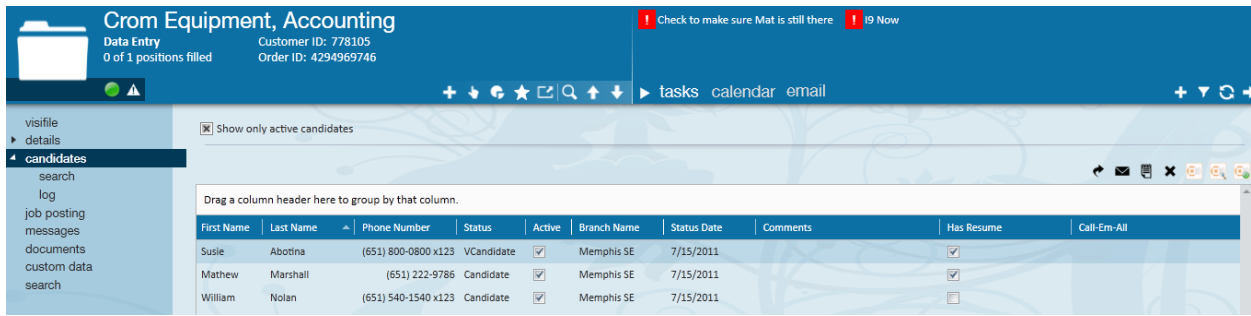
visifile details candidates search log job posting messages documents custom data search

Drag a column header here to group by that column.

First Name	Last Name	Phone Number	Status	Active	Branch Name	Status Date	Company	Comments	Has Resume	Call-Em-All
Susie	Abotna	(651) 800-0800 x123	VCandidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011	Harker Temp, Inc.		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Mathew	Marshall	(651) 222-9786	Candidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011	High Tech Staffing		<input checked="" type="checkbox"/>	<input type="checkbox"/>
William	Nolan	(651) 540-1540 x123	Candidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011	High Tech Staffing		<input type="checkbox"/>	<input type="checkbox"/>

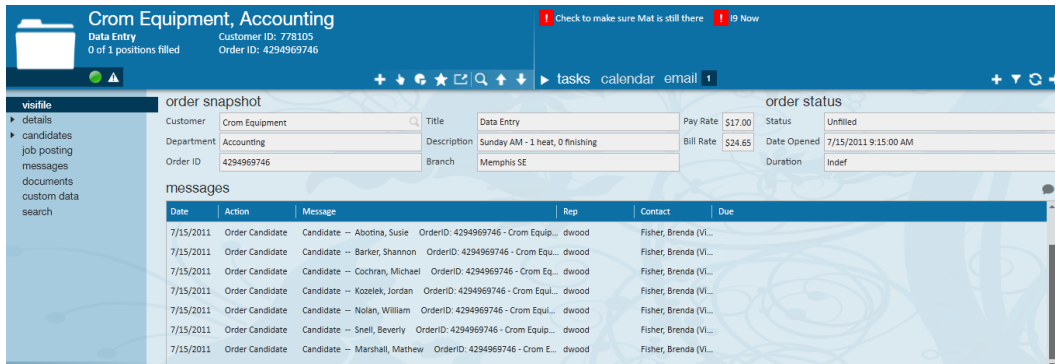
Once a Vendor Contact submits a subcontractor via the WebCenter Vendor Portal they will be displayed in the **Order Candidates** form with the Vendor name listed in the *Company* field and the subcontractor's initial *Status* will be "VCandidate" (vendor candidate) as shown.

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.

If the *Phone Number* column is blank that means the Employee’s record 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 (this will be linked to the Supervisor of the Order only if a *Supervisor* is designated on the **Order Details** form).

Susie Abotina  
3115 Joyce Ct  
Youngstown, OH 44512  
ID: 5020  
SSN: xxx-xx-4561

Check to make sure Mat is still there 1 19 Now




tasks calendar email 2

visifile details

contact methods  
past jobs  
work experience  
education  
work interests  
trak 1  
direct hire  
**candidacy**




Drag a column header here to group by that column.

Customer	Order	Status	Date	Rank	Comments
Crom Equipment	4294969746	VCandidate	7/15/2011		
Crom Equipment	3334	Candidate	7/12/2011		
Utopia Planetia	4294969738	Candidate	7/5/2011		
123 Nursing	4294969642	Candidate	7/5/2011		
Crom Equipment	6122	Approved	3/30/2011		here is the comment






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, *Rank*, 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.

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	Comments	Has Resume	Call-Em-All
Susie	Abotina	(651) 800-0800 x123	VCandidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011		<input checked="" type="checkbox"/>	
Mathew	Marshall	(651) 222-9786	Candidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011		<input checked="" type="checkbox"/>	
William	Nolan	(651) 540-1540 x123	Candidate	<input checked="" type="checkbox"/>	Memphis SE	7/15/2011		<input type="checkbox"/>	

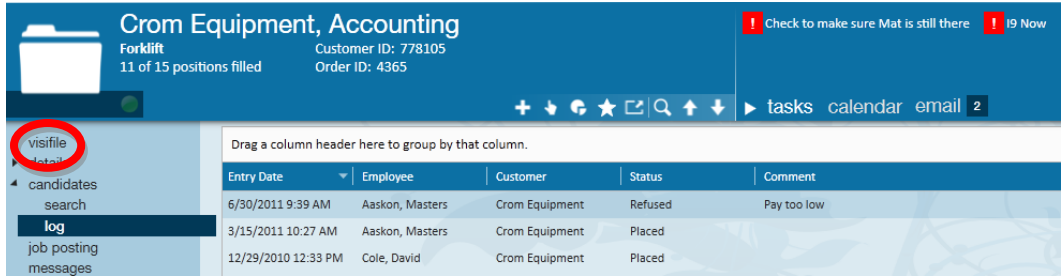
Once Employees have been attached to the **Order Candidates** form there are several functions that can be used.

- 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 clicking on their line and clicking on the  button.
- The candidate can be removed from the Candidate form by clicking on the  button.
- A Call-Em-All broadcast can be sent by selecting the candidates and using the  button in the upper right.

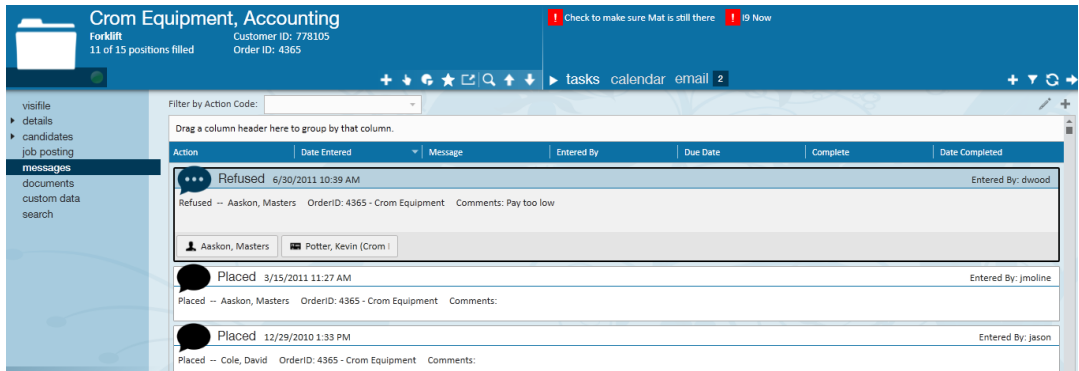
For more information on submitting **Employee** resumes via **Email** refer to the [15R1 Enterprise Submitting Resumes](#) help document. For more information on using the **Order** Call-Em-All Integration refer to the [15R1 Enterprise Call-Em-All Integration](#) help document.

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:

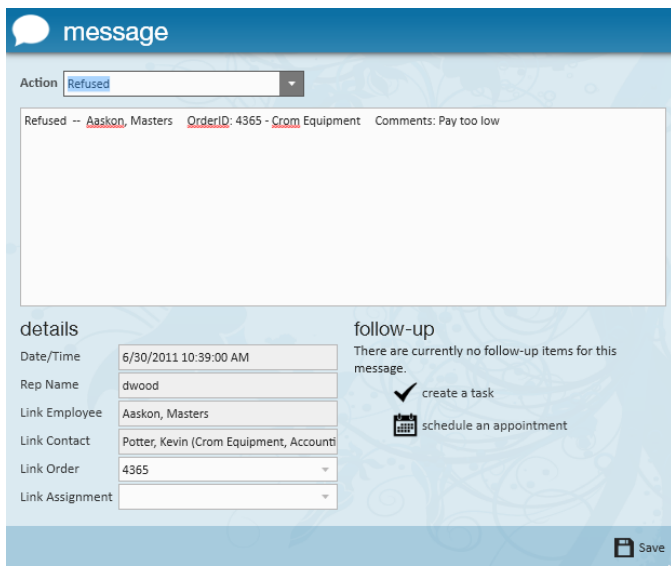
- *Assign Employee* - This option will bring up a prompt that says "Do you want to create an assignment?" click *Create the Assignment* to assign the Employee to the Order. This will also log a **Message** with an *Action* of "Placed" and will remove the **Employee** from the **Candidates** form as they are no longer a candidate once the **Assignment** has been created.
- *Go To Employee Record* - This 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.
- *Edit Item* – When *Edit Item* is selected the **Candidate** form is opened. In this form you can change the Employee's *Status* as it pertains to this 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*. After making changes to this form click *Save* to update the Order.
- *Change Status* – Allows the status of this Candidate as s/he pertains to this Order to be changed.
- *Send Email* – Opens and outgoing email addressed to this Candidate.
- *Send Email to...* - Allows you to choose the email to go either to the Candidate's email address or their text SMS address.
- *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* –Navigates to the Employee's attached **Resume**.
- *Create a Follow-up Task* – Allows you to create a follow-up **Task** for this Candidate.
- *Navigate to* – Allows you to navigate directly to any form within the **Candidate's** record.



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**.

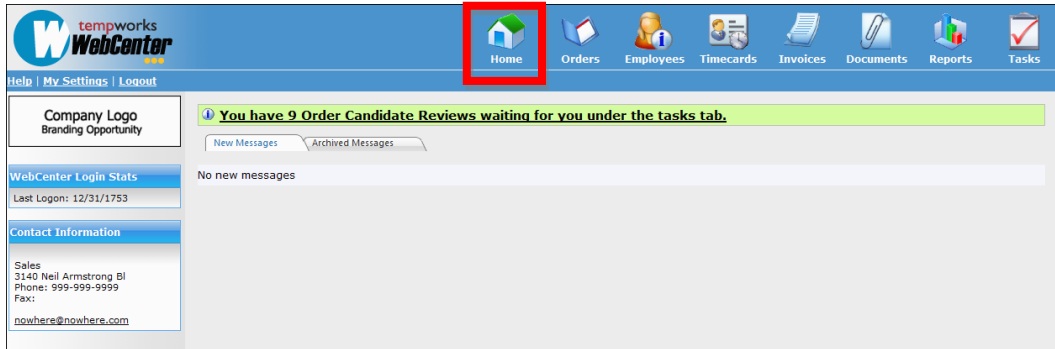


Whenever an Employee is attached to an Order as a "Candidate" a **Message** is logged to the **Order**, **Employee**, **Customer** and **Supervisor Contact** records. This also occurs when the Employee's *Status* is changed in the **Candidates** form or when the *Comments* field is populated from the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

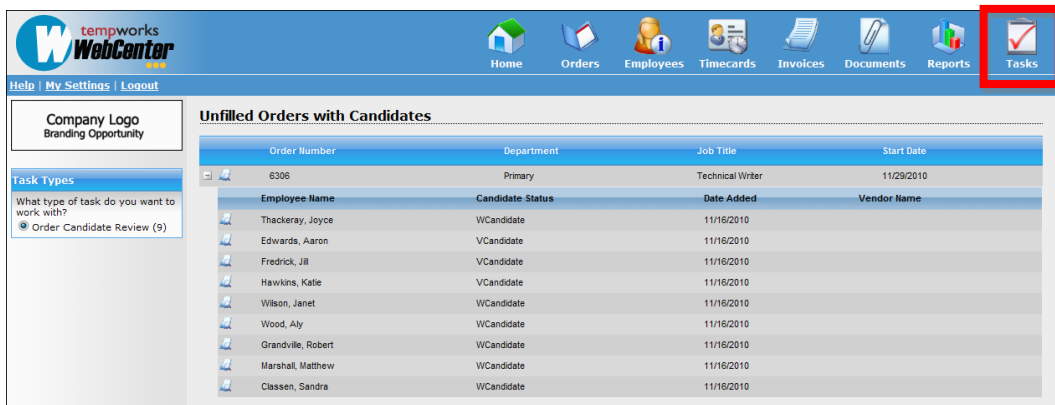



Double-click on the **Message** to open the form. You can edit the **Message** text to include additional information about the **Message** that was logged.

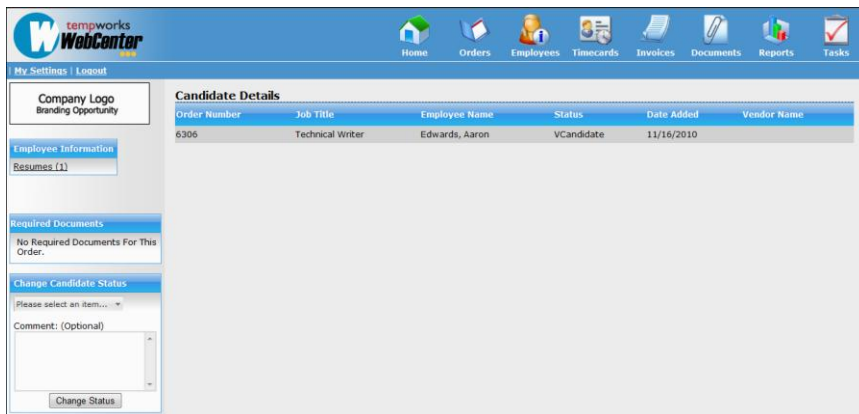
**\*Note – Refer to the Messages chapter of the 15R1 Enterprise Front Office Training Manual for more information on this function.**



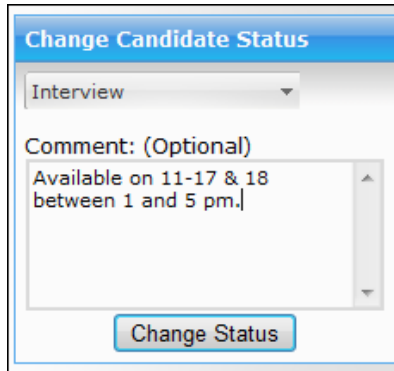
If the **Order Candidate Review** function is being used by the Order's Contact(s) in the WebCenter Customer Portal then they will receive Email notification that candidates have been submitted to the **Order**. When they log in and view their **Home** page they will have a link at the top that they can click on to navigate to the **Tasks** page and view the candidates.



From the **Tasks** page they can expand on the *Order Number* to view the candidates that have been submitted. When they click on the  button to the left of the *Employee Name* it will expand to show the details for that **Employee**.



The *Role* setup that the **Contact** is assigned to will determine what information from the **Employee's** record they will be able to view. In the screenshot above the **Contact** can view only the resume, but other options would include *Interest Codes*, **Past Jobs**, **Education**, and **Required Docs**.

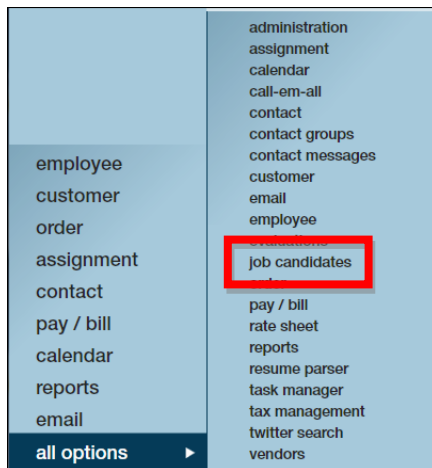


The **Contact** can then choose to change the *Status* of the candidate by selecting an option from the drop down menu in the Change Candidate Status section and add a *Comment* for the action. When they click on the *Change Status* button it will be submitted and updated in the corresponding **Order Candidates** form in Enterprise.

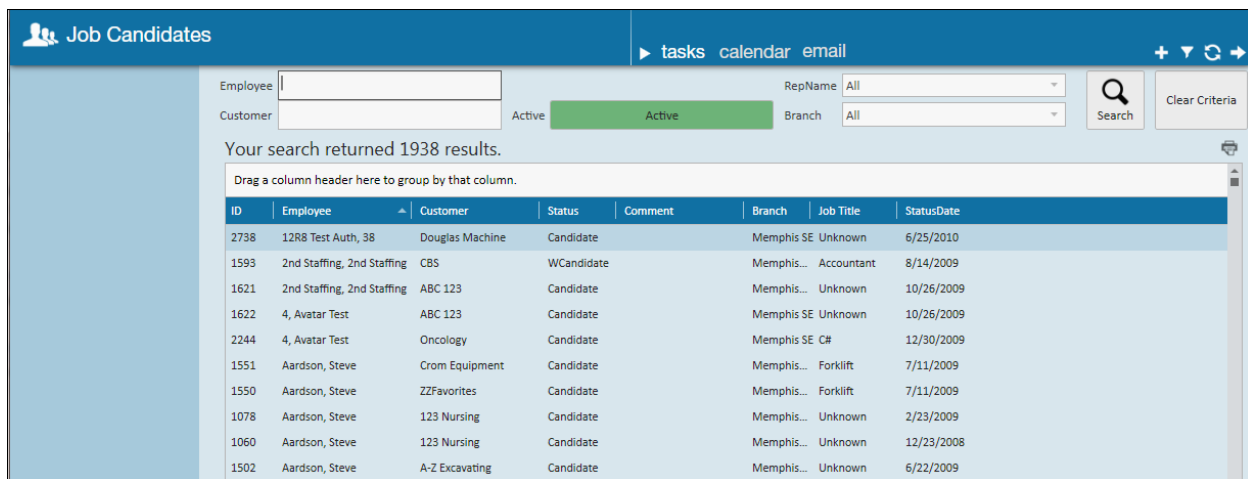
The default setting for **Employees** to be visible on the *Order Candidate Review* of the **Tasks** page in the WebCenter Customer Portal is that they are an "Active" candidate attached to the **Order Candidates** form. Once they have been attached as candidates the **Contact** receives notification. For more control you can have this customized so that only changing them to a specific *Status* (like "Submitted") would make them visible. If this is a concern for your company please discuss with your WebCenter implementation specialist.


An **Email** notification will be sent to the user when the **Contact** updates the candidate *Status* via the WebCenter Customer Portal and the **Order Candidates** form will display the new *Status* and any *Comments* that the **Contact** added.

The WebCenter Customer Portal is an ancillary product that is not included with the "core" Enterprise software. Please contact a TempWorks representative for more information about this web solution.



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



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 877-452-0327 or by sending an email to [support@tempworks.com](mailto: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](mailto:Trainers@TempWorks.com).