



Lunchtime Webinar



Top tips

Applicant Management

Wednesday, 9 January 2019

Agenda



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Creating and managing candidate records

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Linking candidates to jobs

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Selection and hiring applicants list

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Moving candidates through your selection process

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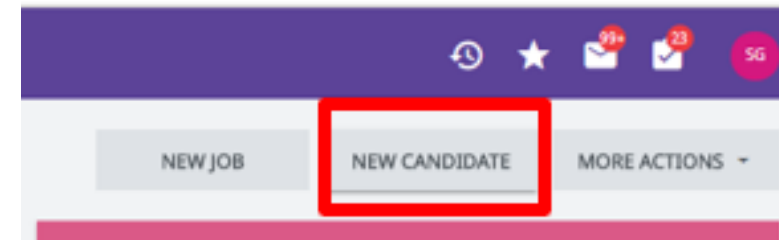
Questions

Creating and managing candidate records

Creating a new candidate record

Before creating a candidate record, please do search TalentLink first as the candidate may already exist.

To create a new candidate record, navigate to your TalentLink Dashboard, and select '**New Candidate**';



The candidate record is split into three sections;






CANDIDATE NAME

Title	<input type="text"/>
First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Middle Name	<input type="text"/>

CONTACT INFORMATION

Email Address	<input type="text"/>
Alternative Email	<input type="text"/>
Phone (Home)	<input type="text"/>
Phone (Mobile)	<input type="text"/>
Phone (Work)	<input type="text"/>
Street	<input type="text"/>
Street 2	<input type="text"/>
City	<input type="text"/>
ZIP Code	<input type="text"/>

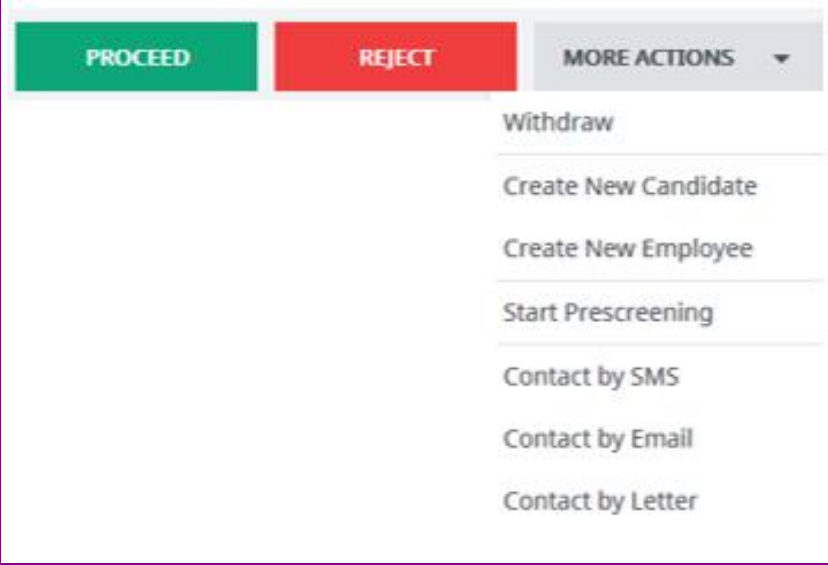
ADMINISTRATIVE INFORMATION

Sourcing Channel Type	<input type="text"/>
Sourcing Channel Name	<input type="text"/> 
Link Candidate to Requisition	<input type="text"/>  
Link Candidate to Folder	<input type="text"/>  
Sourcing Medium *	<input type="text" value="Please Select"/>
Data Privacy Statement *	<input type="text" value="6 Months"/>

Creating and managing candidate records

You can also create a candidate record via the **selection and hiring tab**

When creating a candidate via the selection and hiring tab the system will automatically populate the job requisition linking information.



A screenshot of a web application interface showing a dropdown menu. At the top, there are three buttons: 'PROCEED' (green), 'REJECT' (red), and 'MORE ACTIONS' (grey with a downward arrow). The 'MORE ACTIONS' menu is open, displaying a list of options: 'Withdraw', 'Create New Candidate', 'Create New Employee', 'Start Prescreening', 'Contact by SMS', 'Contact by Email', and 'Contact by Letter'.

Link Candidate to
Requisition

WMJ MASTER Test Vacancy - WMJ00010



Creating and managing candidate records

Update a candidate record

CANDIDATE SUMMARY

[Switch To Contractor](#)



WMJOBS MELISSA TEST

123 Hill Street, Oldbury, B69 3DB, Birmingham
test@wmemployers.org.uk

EDIT SECTION

You can update a candidate record by editing the candidate summary.

The email address which displays on a candidate record is not linked to the candidates front office WMJobs account.

Creating and managing candidate records

If the candidate **already exists**

TalentLink will display this message if the candidate already exists, therefore we would advise you to always search for a candidate record before creating a new candidate.

Please note – once the record has been merged you are unable to reverse this action.

▲ Candidate you are about to create already exists

Existing Candidate Details

First Name	Nicola
Last Name	Warner
Email	nicolawarnertest@gmail.com

Actions

CONTINUE

Continue by merging candidate into existing record

BACK TO FORM

Go back to the candidate creation form to amend the details and create a separate candidate record

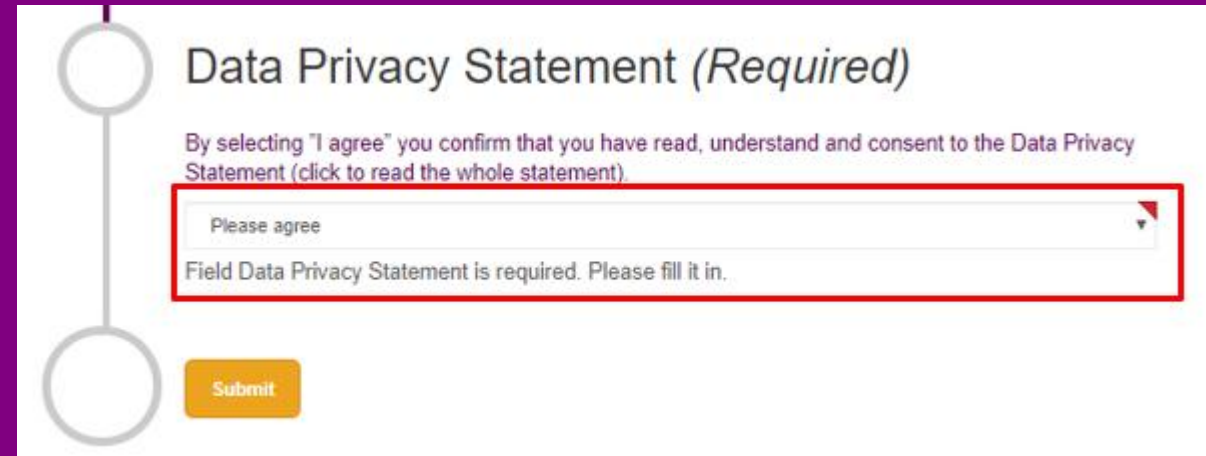
GO TO CANDIDATE

Cancel current action and navigate to the existing candidate

Creating and managing candidate records

Application consent management

A candidate is unable to apply without agreeing to the Data Privacy statement, therefore all applications submitted online via wmjobs.co.uk will have consent obtained. However this isn't the case for manual candidates created.




The screenshot shows a web form titled "Data Privacy Statement (Required)". Below the title, it states: "By selecting 'I agree' you confirm that you have read, understand and consent to the Data Privacy Statement (click to read the whole statement)." There is a dropdown menu with the text "Please agree" and a red border around it. Below the dropdown, it says "Field Data Privacy Statement is required. Please fill it in." At the bottom right of the form is a yellow "Submit" button. On the left side of the form, there are two large, empty circles connected by a vertical line.

Creating and managing candidate records

Application consent management

The system will highlight if consent hasn't been obtained on the candidate overview screen and the applications tab.

 WMJOBS MELISSA TEST

CANDIDATE OVERVIEW

APPLICATIONS

DOCUMENTS/CANDIDATE POOLS

COST TRACKING

CANDIDATE HISTORY

EMPLOYEE - ACTIVE

Contact

traineebp@wmemployers.org.uk

Home phone - / Mobile phone - / Work phone -

Candidate ID 121802


Current position

WM Jobs - WMJobs Test Position (HR approval)


Administrative comments

Edit

Applications



WMJ MASTER Test Vacancy
(WMI000100200) (WMJobs)




In Process (Since 20/12/2018)

SELECTION STEPS

ADDITIONAL TASKS

HIRING PROCESS

 Submission Details

Submission date: 20/12/2018 10:49 Europe/London by GSA System
Sourcing Channel: Talentlink
Application consent missing

Creating and managing candidate records

Application consent management

Once the consent has been updated, the system will display this and obtain the audit history.

WMJ MASTER TEST VACANCY CONSENT

i

Application consent

☒

Consent obtained via email on the 10th Dec 2018

Characters left: 3953

CANCEL

SAVE

Applications

WMJ MASTER Test Vacancy

(WMJ000100200) (WMJobs)

In Process

(Since 20/12/2018)

Submission Details

Submission date: 20/12/2018 10:49 Europe/London by GSA System

Sourcing Channel: Talentlink

Application consent given

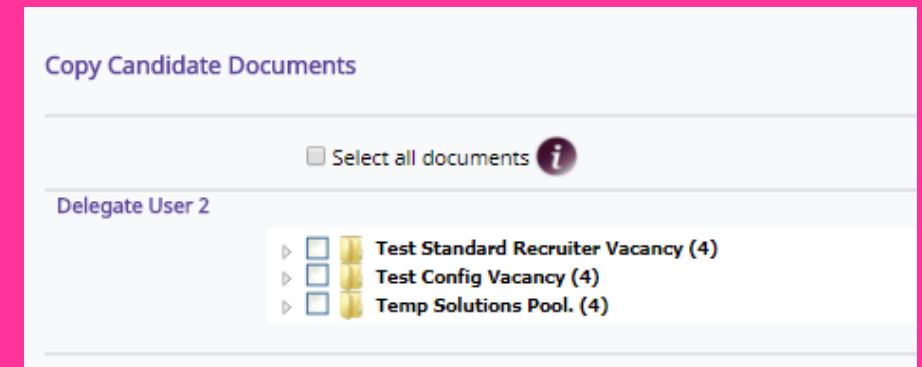
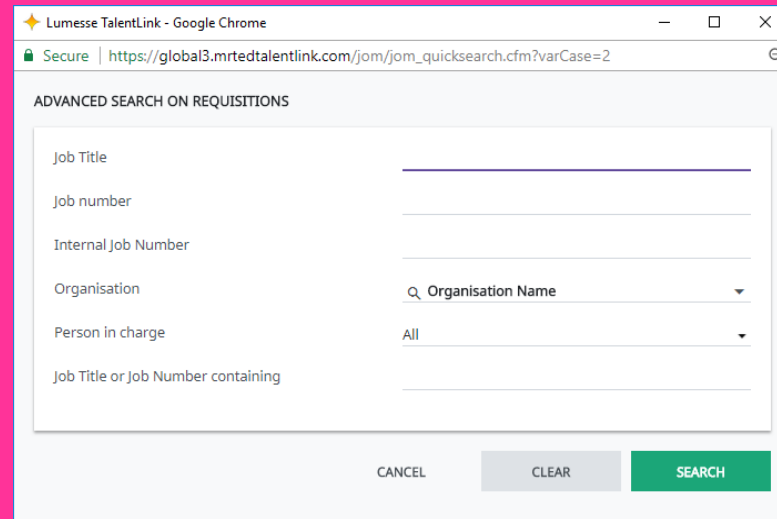
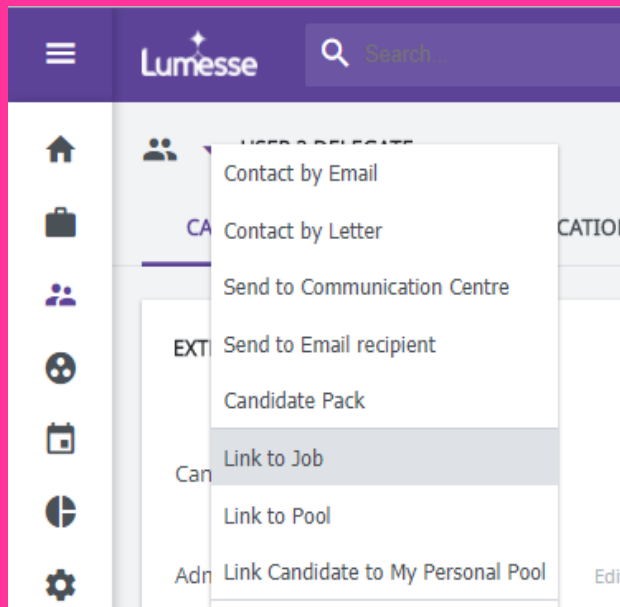
Linking candidates to jobs

Link a candidate record via the **candidate overview screen**

You can link a candidate to another position via the candidate overview screen.

Once selected you will need to search for the job you wish to link the candidate too.

Once the position has been found, the final step is copying over documents.



Linking candidates to jobs

Link a candidate record via the **selection and hiring tab**

You can also link a candidate to a position via the selection and hiring tab following the same 3 steps.

The screenshot displays a web application interface for managing candidates. At the top, there's a header bar with a search icon, a tab labeled 'In Process', and several filters: 'All candidate types', 'All Steps', 'Any step status', and a 'Filter by keyword' search bar. Below the header, there are three main action buttons: 'PROCEED' (green), 'REJECT' (red), and 'MORE ACTIONS' (grey). A status indicator shows '1-12 of 12 records, 1 items selected'. Below this, there's a pagination control showing 'page 1 / 1' with navigation arrows and a 'Go to page' dropdown. The main content area is a table with columns: 'CANDIDATE', 'CANDIDATE PACK', 'CV', 'QUESTIONNAIRE 1', 'APPLICATION DATE', 'LAST STEP', 'STATUS OF SELECTED STEP', and 'EMAIL'. The first row of the table is highlighted in yellow and shows a candidate named 'Sall, Palli' with an application date of '11/06/2014' and a status of 'Reference Check Status: Submitted'. To the right of the table, a 'MORE ACTIONS' dropdown menu is open, listing various actions: 'Withdraw', 'Create New Candidate', 'Create New Employee', 'Start Prescreening', 'Contact by SMS', 'Contact by Email', 'Contact by Letter', 'Candidate Pack', and 'Link to Job'.

	CANDIDATE	CANDIDATE PACK	CV	QUESTIONNAIRE 1	APPLICATION DATE	LAST STEP	STATUS OF SELECTED STEP	EMAIL
<input checked="" type="checkbox"/>	Sall, Palli				11/06/2014	Reference Check	Status: Submitted	p.sall@wmemployer

- Withdraw
- Create New Candidate
- Create New Employee
- Start Prescreening
- Contact by SMS
- Contact by Email
- Contact by Letter
- Candidate Pack
- Link to Job

Selection and hiring applicants list

You can **configure** your applicants list

Additional columns can be added on a job by job basis as well as all jobs.

MANAGE TABLE COLUMNS

HIDDEN COLUMNS

Search

Candidate ID
Sourcing Channel
Interview Date of selected step
Feedback report of selected step
Cover Letter
Last questionnaire
Last feedback report
Attached CV
Country
Region
Location
Company
Position
LinkedIn Profile Preview
Panel Review
Rating
First active step
Phone Number
Administrative comments

VISIBLE COLUMNS

Search

Candidate Pack
CV
Questionnaire 1
Application date
Last step
< Status of selected step
Email
> Application Status
Consent
Most Recent Step

CANCEL

SAVE FOR ALL JOBS






SAVE SETTINGS

Please contact the WMJobs team if you would like your default applicant list configuration updated.

Selection and hiring applicants list

Filters on your applicants list






On the selection and hiring applicants list you can filter applications using the column headers. You can filter on most of the columns available, e.g application submission date.

<input type="checkbox"/>	CANDIDATE	CANDIDATE PACK	CV	QUESTIONNAIRE 1	APPLICATION DATE ▲	LAST STEP	STATUS OF SELECTED STEP
	<input type="text" value="Filter"/>		<input type="text" value="Filter"/>	<input type="text" value="Filter"/>	<input type="text" value="01/06/2018"/>	<input type="text" value="Filter"/>	
<input type="checkbox"/>	 Hampton (Test), Sean				START DATE: TODAY 01/06/2018	Shortlisting Status: Submitted	-
<input type="checkbox"/>	 Hampton (Test), James				END DATE: TODAY 01/08/2018	Shortlisting Status: Submitted	-
<input type="checkbox"/>	Test, Mel Mel					Reference Status: Submitted	-

Moving candidates through your selection process

Proceed with candidates in bulk

Only proceed with candidates in bulk when moving candidates to a shortlisting step, interview step and when managing rejections.

										PROCEED	REJECT	MORE ACTIONS
1-3 of 3 records, 3 items selected										Items per page: 10		
										Go to page ▾		
✓	CANDIDATE	CANDIDATE PACK	CV	QUESTIONNAIRE 1	APPLICATION DATE ▲	LAST STEP	STATUS OF SELECTED STEP	EMAIL	APPLICATION STATUS	CONSENT		
✓	 Hampton (Test), Sean				23/07/2018	Shortlisting Status: Submitted	-	m.kang@wmemployers.org.uk	In Process			
✓	 Hampton (Test), James				23/07/2018	Shortlisting Status: Submitted	-	m.kang@wmemployers.orgg.uk	In Process			
✓	Test, Mel Mel				23/07/2018	Reference Check Status: Submitted	-	m.kang@wmemployers.org.uk	In Process			

Moving candidates through your selection process

Interview options available.

Within the system there are a number of interviews options which display. When using the interview scheduler please ensure one of the 2 highlighted options are selected as all of the other options listed do not link up to the interview scheduler.

Define meeting

Job Opening *WMJ MASTER Test Vacancy*

Step Name Interview 1

Candidates Sean Hampton (Test)

- ☐ Define the meeting now
- ☐ Ask someone to schedule the meeting
- ☐ Invite using Interviewer's Availabilities (e-booking)
- ☐ Invite using Interview Scheduler (e-booking)
- ☒ Invite using Interview Scheduler (Individual slot)

* Required Field


CANCEL SUBMIT

Moving candidates through your selection process

Best way to proceed with a candidate when **multiple steps need to be performed**

When multiple steps need to be open at the same time, you are unable to proceed with candidates in bulk as the system will close the previous step.

Therefore it is advised to start the step via the applications tab.

	Shortlisting	<div>Start</div>
	Additional Assessment	<div>Perform</div>
	Telephone Interview	<div>Put on hold</div>
	Interview 1	<div>Reject</div> <div>Withdraw</div> <div>Continue</div>

Start – Submits the step

Perform – Allows you to carry out the action which sits behind the step

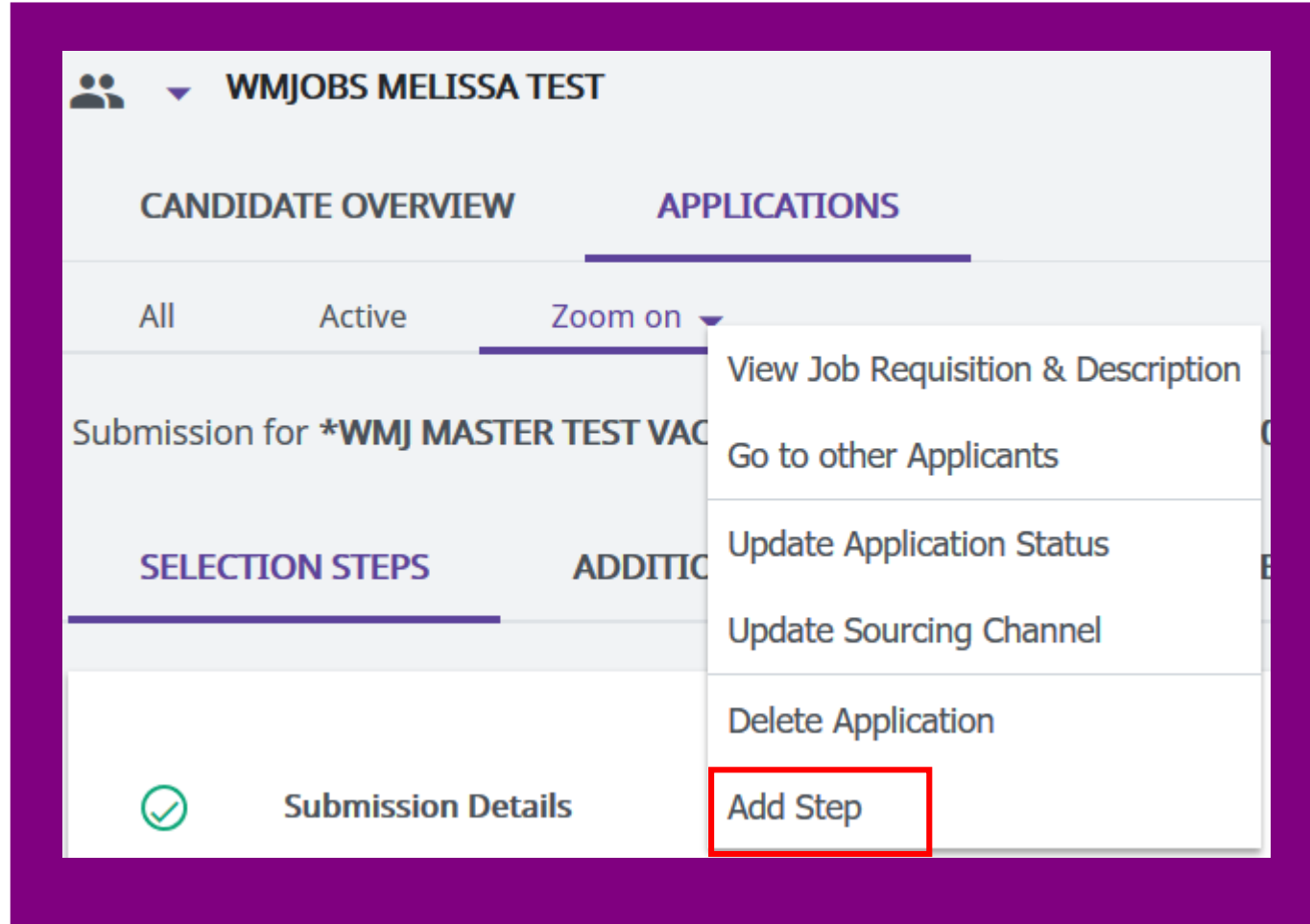
Continue – Marks the step as closed.

Moving candidates through your selection process

You can **add a manual step** into the candidate selection process

If you require an additional step within the process, an adhoc step can be added.

Adding an interview step does not link to the interview scheduler.



The screenshot displays the 'WMJOBS MELISSA TEST' interface. At the top, there are tabs for 'CANDIDATE OVERVIEW' and 'APPLICATIONS', with 'APPLICATIONS' being the active tab. Below these tabs, there are filters for 'All', 'Active', and 'Zoom on'. A dropdown menu is open, showing options: 'View Job Requisition & Description', 'Go to other Applicants', 'Update Application Status', 'Update Sourcing Channel', 'Delete Application', and 'Add Step'. The 'Add Step' option is highlighted with a red box. In the background, there is a table with columns 'SELECTION STEPS' and 'ADDITIONAL STEPS'. The first row shows a green checkmark icon and the text 'Submission Details'.

Moving candidates through your selection process

Uploading documents to a candidate file

ATTACH DOCUMENT TO MELISSA TEST WMJOBS

Document path (required)	<input type="button" value="Browse..."/> No file selected.
Description	<input type="text"/>
Document Type	CV ▼
Document Language	English (UK) ▼
Attach this Document (required)	Select a job opening ▼
Document Security (required)	No Security ▼

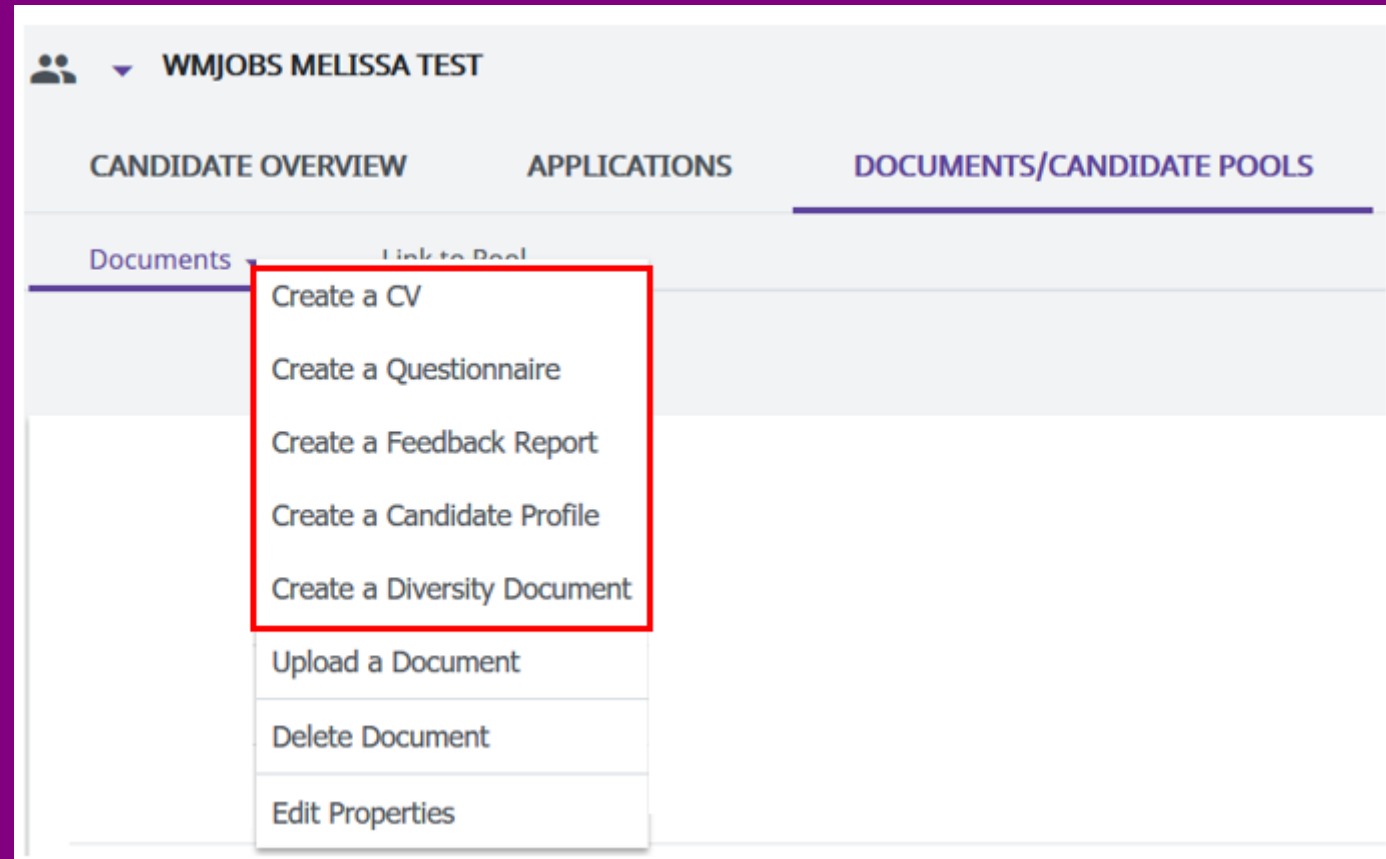
If you have received a document for the candidate outside of the system, this can be manually uploaded to the candidate record.

The record will display under the “Documents/Candidate pools tab”.

Moving candidates through your selection process

Creating a candidate TalentLink form

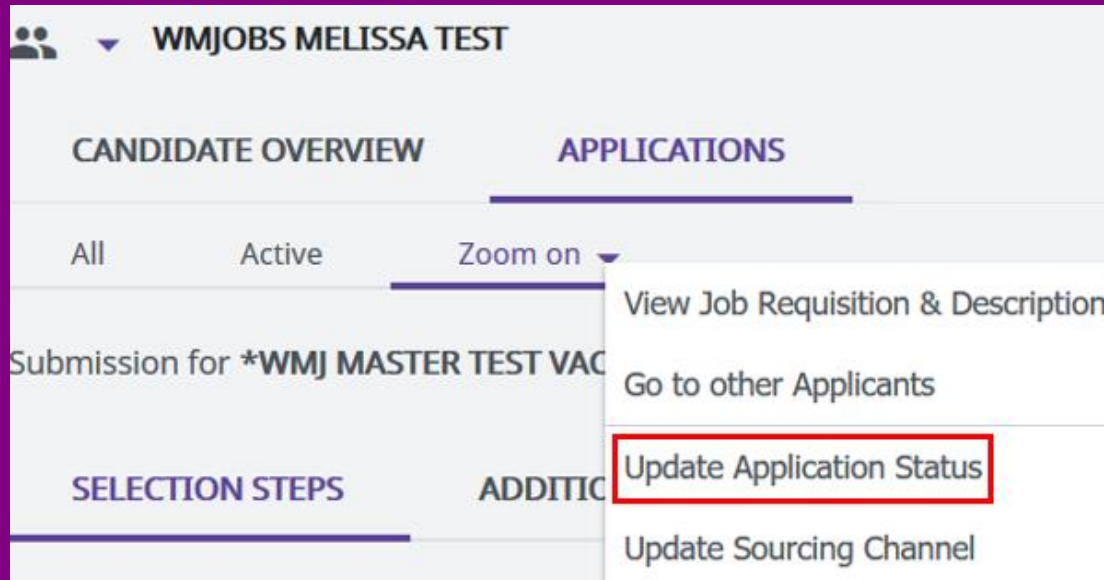
You can also create TalentLink forms against a candidates record. For example if a paper application is submitted you can create a diversity form via the “Documents/Candidate pools” tab.



Moving candidates through your selection process

Manual application status changes

Within the system it is possible to manually update the candidates application status. However we would advise where possible it is best to move your candidates through the selection process steps.



The 'EDIT APPLICATION STATUS' form displays the following information:

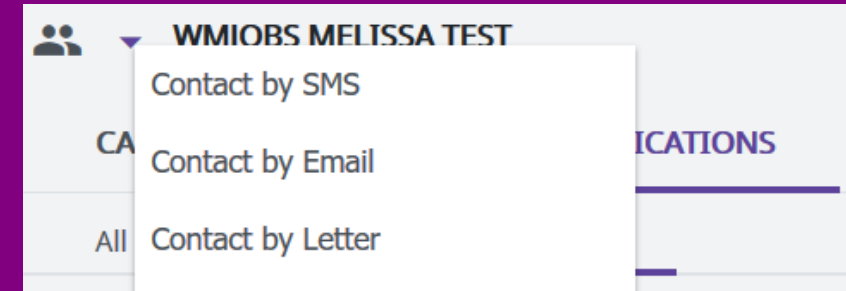
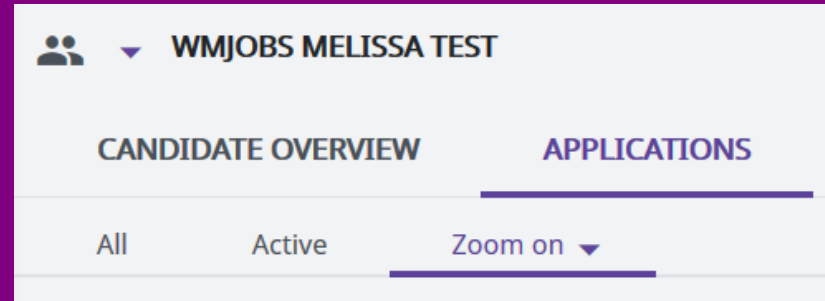
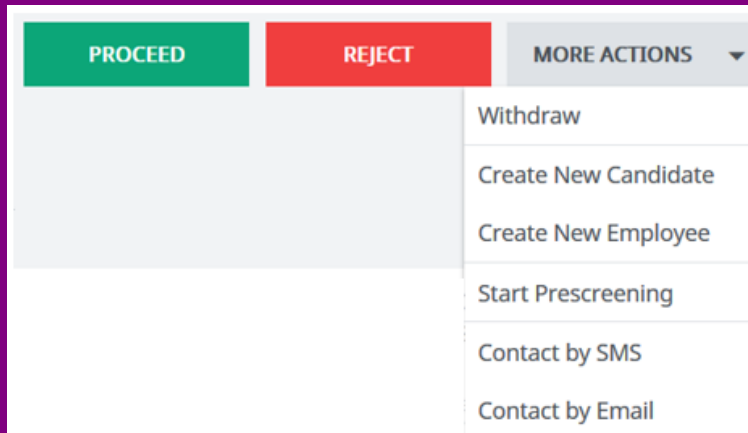
Candidate	WMJobs Melissa Test
Job Opening	*WMJ MASTER Test Vacancy*
Current Status	In Process (09/01/2019 08:34)
New Status (required)	In Process
Reason for change	Please select
Administrative comments	<input type="text"/>

Please note – no actions sit behind a manual status change and this can impact your reporting

Moving candidates through your selection process

Contact a candidate via email

It is best to select the contact candidate by email option via the selection and hiring tab, the option will display on your applicants list as well as the applications tab.



The below error will display when contacting a candidate via the candidate overview screen.

No job context is assigned, therefore this email will be visible to all departments who have access to this candidate, and merge fields relating to jobs/ applications will not populate.
Recommendation: send email from application context if appropriate.

Thank you – questions?

Melissa Kang
Resourcing Business Partner