



## Quick Start up Guide

Super/Division Admin Users

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## Getting Started

### How to Login

In order to login to your account click on the Login link provided below: or copy and paste into your browser

Login here: <https://www.candidatemanager.net/cm/login.aspx>

Candidate Manager

**Username**  
Setup@candidatemanager.net

**Password**  
●●●●●●●●

Sign In

Help : [I forgot my password](#)

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Alternatively you can access the login page via the candidate manager website by clicking 'login' on the top right hand corner.

NB: If you forget your password for CM, simply click on the '**I Forgot your password**' link, enter your username in the appropriate field, click Send Password and the system will email you a replacement password.

### How to Sign-out

When Logged into Candidate manager, Select Sign **Out** on the Right hand side under your Company Logo.



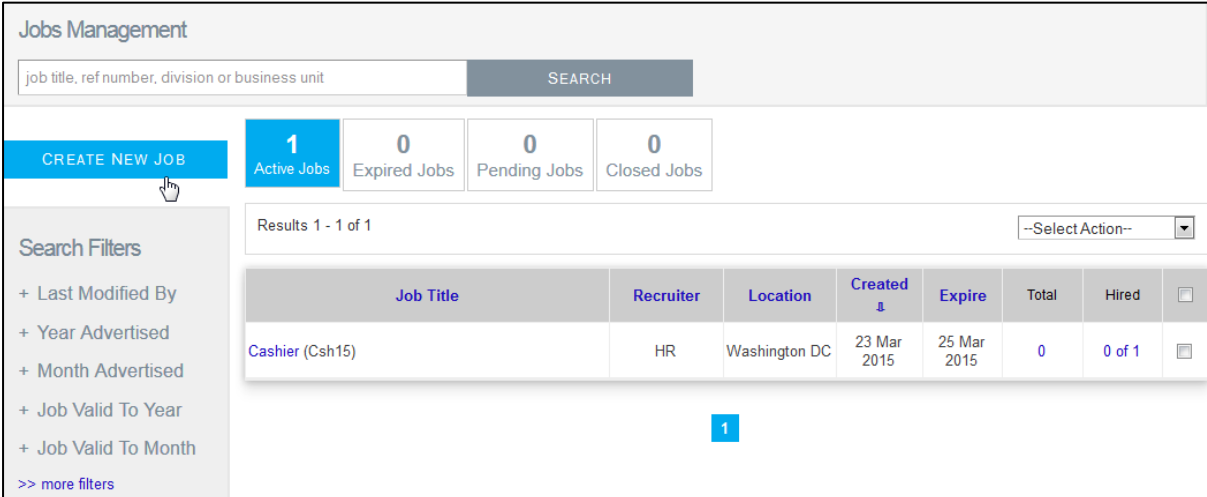
## Jobs Module

The jobs module contains pages for managing the jobs within the Candidate Manager system.

For example, you can create a job, post jobs to corporate external/internal websites as well as recruitment websites, Social media and agencies.

### Creating a Job

Before you can create a new job, you must have at least one **business unit**, **division** and **recruiter contact** set up.



The screenshot displays the 'Jobs Management' interface. At the top, there is a search bar with the placeholder text 'job title, ref number, division or business unit' and a 'SEARCH' button. Below the search bar, there is a 'CREATE NEW JOB' button and four status boxes: 'Active Jobs' (1), 'Expired Jobs' (0), 'Pending Jobs' (0), and 'Closed Jobs' (0). On the left side, there is a 'Search Filters' panel with expandable sections for 'Last Modified By', 'Year Advertised', 'Month Advertised', 'Job Valid To Year', and 'Job Valid To Month', along with a '>> more filters' link. The main content area shows 'Results 1 - 1 of 1' and a table with the following data:

Job Title	Recruiter	Location	Created	Expire	Total	Hired	
Cashier (Csh15)	HR	Washington DC	23 Mar 2015	25 Mar 2015	0	0 of 1	<input type="checkbox"/>

Below the table, there is a blue box containing the number '1'.

1. Select **Create new Job** button



2. Fill in all applicable fields on the Job **Details** page. Mandatory fields are marked with an asterisk (\*).

A screenshot of the 'Create New Job' web form. The title is 'Create New Job'. Below the title is a navigation bar with tabs: 'Details' (highlighted in blue), 'Options', 'Requisition', 'Career Portal', 'Posting Media', 'Agency', and 'Job History'. The main form area contains several fields: 'Title: \*' (text input), 'Reference: \*' (text input), 'Employment Type: \*' (dropdown menu with 'Select Employment Type'), 'Salary: \*' (Euro dropdown, two numeric input fields for '0' and '0', 'To', 'Per', Annum dropdown, and 'Not disclosed' checkbox), 'Advertising Period: \*' (two date pickers with 'To'), 'Number of positions assigned to job: \*' (text input with '1'), and 'Long Description: \*' (rich text editor with a toolbar containing icons for cut, copy, paste, undo, redo, bold, italic, underline, strikethrough, link, unlink, bulleted list, numbered list, indent, outdent, and a table icon).

- If you do not wish to have the salary displayed on the advertised job page, tick the **Not disclosed** checkbox
3. Please Ensure all required HR details have been selected correctly including HR manager (If HM required to review applicants)

A screenshot of the 'HR Details' web form. The title is 'HR Details'. The form contains several fields: 'Division: \*' (dropdown menu with 'Default'), 'Business Unit: \*' (dropdown menu with 'Default'), 'Recruitment Contact: \*' (text input with 'HR'), 'Recruiter Email: \*' (dropdown menu with 'MPGSetup@candidatemanager.net'), and 'Hiring Manager: \*' (checkbox labeled 'Select all fields' and a dropdown menu with an empty field below it and a close button 'X' on the right).

Details	<b>Options</b>	Requisition	Career Portal	Posting Media	Agency	Job History
---------	----------------	-------------	---------------	---------------	--------	-------------

**Job Application Options**

CV Required:  Yes - Mandatory  Yes - Optional  No

Auto Acknowledge  Auto Fail

**Application Forms**

External:

**Pre-Screening Forms**

External:

Internal:

**Equality Monitoring Options**

\* Equality Monitoring Form:

\* Standard Occupational Classification:

Cancel Save and continue Save and Close

- If you tick the **Auto Acknowledge** checkbox, new applicants will automatically receive an acknowledgement email and be set to the Acknowledged status in the Applicants module.
- If you tick **Auto Fail** you need to ensure knockout questions are set up on the application form applicants who hit the knockout question during the application process will receive a failed email and will be set to the Failed Status in the Applicants Module.
- The selected external application form will be used for internal/agency applications where no internal/agency application form is selected.
- If **Pre-Screening Forms** are required for the role please select the correct form from the External/Internal Dropdowns

## Requisition

Depending on some company's procedure's some roles may need to be approved prior to being advertised. If you do not have requisition you can skip this section.

Details	Options	<b>Requisition</b>	Career Portal	Posting Media	Agency	Job History
---------	---------	--------------------	---------------	---------------	--------	-------------

**Requisition Form**

Requisition Id: \* 2015-1

Requisition Type New Position

\*Requisition Open Date 23/03/2015

\*Job Title Cashier

\*Department Cash Desk

\*Location TBC

\*Line Manager TBC

\*Expected Start date 01/04/2015

\*Proposed Salary 24,000

\*Number of positions 5

\*Replacement  Yes  No

If Yes , Who?

- Fill out all Required fields on the Requisition page
- Select the Users you would like to send the role for approval
- Once complete Select **'Send for Approval'** at the bottom of the page
- On the next screen you will see the Approval email to make any required changes
- Click **'Send'** in order for the email to go to the Users

Once the role has been approved by all users the recruiter of the role will receive a confirmation email and will then be able to proceed in advertising the role.

## Advertising a Job

Details	Options	Requisition	Career Portal	Posting Media	Agency	Job History
<p>Display Location: <input type="text" value="Washington DC"/></p> <p><b>Search / Match</b></p> <p>*Category: <input type="text" value="Administration"/></p> <p>*Location: <input type="text" value="Arlington, VA&lt;br/&gt;Philadelphia, PA&lt;br/&gt;Raleigh, NC&lt;br/&gt;Washington DC"/></p> <p>Internal Career Portal <input type="text"/></p> <p>External Career Portal <input type="text" value="MPG Retail (http://www.candidatemanager.net/cm/)"/></p> <p style="text-align: right;"> <input type="button" value="Cancel"/> <input type="button" value="Save and continue"/> <input type="button" value="Save and Close"/> </p>						

- Within the career portal section select the category and location of the role.
- To post a job to external/internal company websites, select a website and/or intranet site from the options listed in the Career portal Tab.
- Once an external careers website is selected, the job status will be updated to Open-Advertised
- Select '**Save and close**' to finish.

## Posting media

In order to advertise the role to Job boards or social media sites please select '**Save and continue**' to the posting media tab.

Details	Options	Requisition	Career Portal	Posting Media	Agency	Job History
<p><b>Location</b></p> <p>Country * <input type="text" value="Select Country"/></p> <p>Location * <input type="text" value="Select Location"/></p> <p>Alt Location <input type="text" value="Free-Text Location"/> Location to display when the job board supports typed-in location.</p> <p>Post/Zip Code <input type="text" value="Type Postcode"/></p> <p><b>Type</b></p> <p>Employment Type * <input type="radio"/> Contract <input type="radio"/> Permanent <input type="radio"/> Temporary</p> <p>Full Time/Part Time * <input type="radio"/> Full-time <input type="radio"/> Part-time</p> <p><b>Advertising Period</b> <input type="button" value="Help"/></p> <p>Post From <input type="text" value="25/03/2015"/> To : <input type="text" value="25/03/2015"/></p> <p><b>Posting Media</b></p>						



Fill out all the required fields for the Job boards on this page including the advertising date's specific for the job boards.

Once complete select **'Post'** for the Media you would like to advertise the role to

Click **'Save and close'** if you do not require sending the role to Agency's

## Agency

The list of available agencies and consultants will be displayed on this page to add the job to the agency portal, tick the checkbox for the corresponding agency.

If you wish to notify the consultant for that agency, tick the checkbox for the corresponding consultant.

If you **do not** select a consultant, the agency will not receive a notification email.

If you have selected one or more consultants to be notified, the Email Job Details page will be displayed with the details of the email to be sent to the consultant(s) when saving the job.

The screenshot shows the 'Agency' tab selected in a navigation bar. The main content area contains the following elements:

- Country:** A dropdown menu with the text 'Select Country'.
- Agency Application Form:** A dropdown menu with the text 'Select an Agency Application Form'.
- Agency List:** A list box with a 'Select All Agencies' checkbox at the top and one entry 'Hay - Dublin' with a checkbox.
- Agency Consultant List:** A list box with a 'Select All Consultants' checkbox at the top and one entry 'Hay - Dublin (Dara Pearse)' with a checkbox.
- Buttons:** 'Cancel' and 'Save and Close' buttons located at the bottom right of the form area.

## Copying a Job

Copying a job can be very useful, for example if you have several jobs to advertise that have only minor differences between them.

### How to copy a job:

1 Active Jobs	0 Expired Jobs	0 Pending Jobs	0 Closed Jobs				
Results 1 - 1 of 1				--Select Action--			
Job Title	Recruiter	Location	Created	Expire	Total	Hired	
Cashier (Csh15)	HR	Washington DC	23 Mar 2015	25 Mar 2015	0	0 of 1	<input checked="" type="checkbox"/>

- Select the Job you wish to copy by ticking the Box on the right hand side

1 Active Jobs	0 Expired Jobs	0 Pending Jobs	0 Closed Jobs				
Results 1 - 1 of 1				--Select Action--			
Job Title	Recruiter	Location	Created	Expire	Total	Hired	
Cashier (Csh15)	HR	Washington DC	23 Mar 2015	25 Mar 2015	0	0 of 1	<input checked="" type="checkbox"/>

--Select Action--

--Select Action--

**Single Job Action**

- Copy
- Preview
- Match
- Manage Tasks
- Form Search
- Add Applicant

**Multi Job Action**

- Assign to User
- On Hold
- Close
- Closed - Cancelled
- Closed - Expired
- Closed - Not Filled
- Closed - Filled

- Click on the **Action** drop down and select **Copy** under Single Job Action
- New Job Details page will be displayed, and all fields will be populated with the information from the original job (the reference and title will be prefixed with 'Copy of').
- The Job Preferences page will also be populated with information copied from the original job.
- The information from the posting media pages in the original job will not be copied to the corresponding page of the new copy

## Closing a Job

Closing a Job refers to the actions required to remove a Job from the **Advertised** Status.

### How to Close a Job

If the job is advertised only on your company's external and/or internal website(s);

1. Select the **Job** on the main menu

<b>1</b> Active Jobs	<b>0</b> Expired Jobs	<b>0</b> Pending Jobs	<b>0</b> Closed Jobs
-------------------------	--------------------------	--------------------------	-------------------------

Results 1 - 1 of 1 --Select Action--

Job Title	Recruiter	Location	Created ↓	Expire	Total	Hired	
Cashier (Csh15)	HR	Washington DC	23 Mar 2015	25 Mar 2015	0	0 of 1	<input checked="" type="checkbox"/>

2. From the Action Dropdown select the preferred **'Close'** status

**Jobs Management**

job title, ref number, division or business unit SEARCH

CREATE NEW JOB	<b>1</b> Active Jobs	<b>0</b> Expired Jobs	<b>0</b> Pending Jobs	<b>0</b> Closed Jobs
----------------	-------------------------	--------------------------	--------------------------	-------------------------

Results 1 - 1 of 1 --Select Action--

Job Title	Recruiter	Location	Created ↓	Expire	
Cashier (Csh15)	HR	Washington DC	23 Mar 2015	25 Mar 2015	<b>1</b>

--Select Action--

--Select Action--

**Single Job Action**

Copy

Preview

Match

Manage Tasks

Form Search

Add Applicant

**Multi Job Action**

Assign to User

On Hold

Close

**Closed - Cancelled**

Closed - Expired

Closed - Not Filled

Closed - Filled

3. The job will then move from the **'Active Tab'** to **'Closed Jobs'**

If the job is advertised on external recruitment websites as well as company's external/internal website:

1. Within Jobs management **Click** on the Job you wish to expire
2. Go to the **Posting media** tab
3. Click on the dropdown under **Action** for the Job board you wish to expire the Job.
4. Click on **'Expire'** followed by **'save and close'**

863328	Dice.com			<b>Not Posted</b> - You have not posted to this job board.	Expire
863328	Facebook notes			<b>Not Posted</b> - You have not posted to this job board.	Post Expire No Action

## Applicants Module

The Applicants module is where you can view applicants for the jobs within Candidate Manager and progress candidates through the various recruitment stages.

### Viewing Applicants

In Candidate Manager, you can view all applicants for a job, or all applicants that have been progressed to a specific stage of the recruitment process.

#### How to view Applicants

1. Select **Applicant Management** from the **applicants** drop down in the main menu bar

The screenshot shows the 'Applicants Management' interface. At the top, there is a search bar with the placeholder text 'job title, ref number, division or business unit' and a 'SEARCH' button. Below the search bar, there are four summary cards: 'Active Jobs' with a count of 1, 'Expired Jobs' with 0, 'Pending Jobs' with 0, and 'Closed Jobs' with 0. To the left is a 'Search Filters' sidebar with expandable sections for 'Last Modified By', 'Year Advertised', 'Month Advertised', and 'Job Valid To Year'. The main area displays 'Results 1 - 1 of 1' and a table with the following columns: Job Title, Created, Total, Failed, New, Acknowledged, Shortlisted, Interviews, Offered, Withdrawn, Rejected, and Employed. A single row is visible for 'Cashier (Csh15)' with a creation date of '23 Mar 2015' and counts of 0 for all other categories except 'Employed' which is 1. A blue button with the number '1' is located at the bottom right of the table area.

- This view shows a list of all jobs within Candidate Manager, with numbers indicating the total number of applicants for each job, as well as the number of applicants at each stage of the recruitment process for the job.
2. Click on the number in the **Total Applicants** column to view all applicants for a job(or alternatively on the number in any of the recruitment stage columns to view the applicants for that specific stage
  3. This page indicates the source of each applicant, their rank (based on their answers and the weighting of the questions in the application form) and rating (assigned manually by the recruiter).

The ranking of applicants is colour-coded; **Green** – Passed **Red** - Failed




The screenshot shows the 'All Applicants' page for job 'cb test job cb'. It includes job details: Job Id: 724818 | Job Ref: don001cb, Location: Dublin, Employment Type: Part-time, Advertising Period: 18/04/2011 - 13/08/2014, Business Unit: Computers, Contact: Division Admin, Job Status: Archived, Division: Orla, and Hiring Manager: Hiring test. Below the details is a search bar and an 'ADD APPLICANT' button. The main area shows 'Results 1 - 10 of 10' and a table with columns: Name, Location, Source, Score, Application Date, Flags, Status, CV, and a checkbox. Two applicants are listed: 'Mr test, test' with a score of 100% (green bar) and status 'First Interview', and 'bbb, bbb' with a score of 56% (red bar) and status 'Failed'. A 'Search Filters' sidebar on the left shows filters for Applicant Status: Failed (5), Acknowledged (2), and New Applicant (2).

- There are icons(**Flags**) to indicate whether an applicant has been copied **C**, manually Added to the job **M**, has been submitted by an agency **A**, their details have been Forwarded or if the applicant is a duplicate **D**, within the system
- Clicking on the Duplicate Applicant icon next to an applicant will display a list of the jobs the applicant has applied for, the date/time they applied and their current Status in the recruitment process for those jobs

4. Click on the name of an applicant to view the details of that applicant.

Applicant Details - Mr test test

---

All applicants for this job [Back](#) [Previous](#) [Next](#)    Actions

---

**Application Details**

Job Title    **cb test job cb (don001cb)**

Job Application Id    3683113

Application Date    19/04/2011 12:31:18 (GMT)

Applicant Status    First Interview

Rating    N/A

Rank    100  

**Additional Details [Edit](#)**

Date of Disposition    N/A

**Personal Details [\(Edit\)](#)**

Name    Mr test test

Address    ,

Email Address    Email address not available

mobile    234

Home / Work Phone    234234

Applicant Source    test12

- This page displays the applicant's contact details, a breakdown of the applicant's ranking, a history of the applicant's progress and any notes added, as well as a summary of tasks that have been assigned to the applicant for this job. If the applicant has applied for other jobs within the system, this page will also provide a list of all positions the applicant has applied for under the **Duplicate and Related Applications** section.

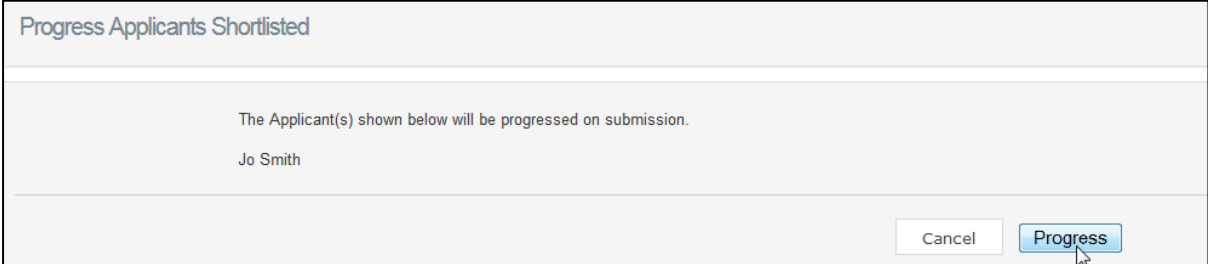
## Progressing applicants

Progressing applicants is a core part of the recruitment process. The progression stages are described in the following table:

<b>Failed -</b>	Used when an applicant will no longer be considered. The applicant can be informed of this progression step by email or letter.
<b>New Applicant</b>	Applicants who have not been contacted at all.
<b>Acknowledged</b>	Used to acknowledge the receipt of a candidate's application. The applicant can be informed of this progression step by email or letter. If Auto Acknowledge is switched on for the job (on the Job Preferences page), applicants will receive an acknowledgement email and will be set to this status immediately after applying.
<b>Shortlisted</b>	Used to shortlist an applicant for further consideration. Internal use only.
<b>Withdrawn</b>	Used to indicate an applicant who has withdrawn their application. Internal use only.
<b>First Interview</b>	Used to invite an applicant to a first interview. The applicant can be informed of this progression step by email or letter.
<b>Second Interview</b>	Used to invite an applicant to a second interview. The applicant can be informed of this progression step by email or letter.
<b>Third Interview</b>	Used to invite an applicant to a third interview. The applicant can be informed of this progression step by email or letter.
<b>Offered</b>	Used to offer a position to an applicant. The applicant can be informed of this Progression step by email or letter.
<b>Rejected</b>	Used to reject an applicant. The applicant can be informed of this progression step by email or letter.
<b>Employed</b>	Used to indicate the successful employment of an applicant. Internal use only.
<b>Correspondence Only</b>	Used for correspondence with an applicant by email or letter. The applicant's Status does not change.

## How to progress Applicants

1. Select Applicant management from the main menu
2. Click on the number in the **Total Applicants** column for the job you want (or on the number in one of the other stage columns)
3. Tick the **Select checkbox** for the applicant(s) you want to progress. You can progress up to 50 applicants at the same time
4. Select the progression type from the **Action** drop-down menu
5. If you select **New Applicant, Shortlisted, Withdrawn or Employed**, click Progress on the confirmation page



The screenshot shows a confirmation dialog box titled "Progress Applicants Shortlisted". The main content area contains the text "The Applicant(s) shown below will be progressed on submission." followed by the name "Jo Smith". At the bottom right of the dialog, there are two buttons: "Cancel" and "Progress". A mouse cursor is pointing at the "Progress" button.

- The status of the applicant will be updated, but the change will not be communicated to the applicant OR if you select any other option, the Progression Details page will be displayed.

Progress Applicant(s) to First Interview

Progress options:

Template:

To: **Jo Smith**  
Josmith@hotmail.com

CC:

Email From:

Subject:

Body:

On this page, you can decide if and how you want to communicate the progression to the applicant. The default setting is configured in the System Options.

The fields displayed on the page depend on what is selected in the Progress Options drop-down menu:

- **Send Email (individual):** This option will send an email to the applicant. If more Than one applicant is being progressed, each applicant will receive an individual Email.
- **Send Email (bulk):** This option will send one email to all applicants, with each applicant included on the to line of the email. Applicants progressed at the same time will not see the details of the other applicants. Not available when progressing only one applicant.
- **Create Letter (individual):** This option will generate a letter to be sent to the Applicant. Only one letter will be generated, even if more than one applicant is being progressed.
- **Create Letter (bulk):** This option will generate a group of letters to be sent to the Applicants. One document containing several letters will be generated. Not available when progressing only one applicant.
- **Progress Only - No Contact (individual):** This option will progress the applicant without any communication to the applicant. If more than one applicant is selected, the progress option must be confirmed separately for each applicant.
- **Progress Only - No Contact (bulk):** This option will progress the applicants without any communication to the applicants. Progression is confirmed once for all applicants. Not available when progressing only one applicant



Fill in all applicable fields on the **Progression Details page**. Fields will be pre-filled with user and default template information.

If an email option is selected, click Preview to see a preview of the email that will be sent, or click Progress to progress and inform the applicant(s).

OR

If a **no contact option** is selected, click Progress to update the status without notifying the applicant(s).

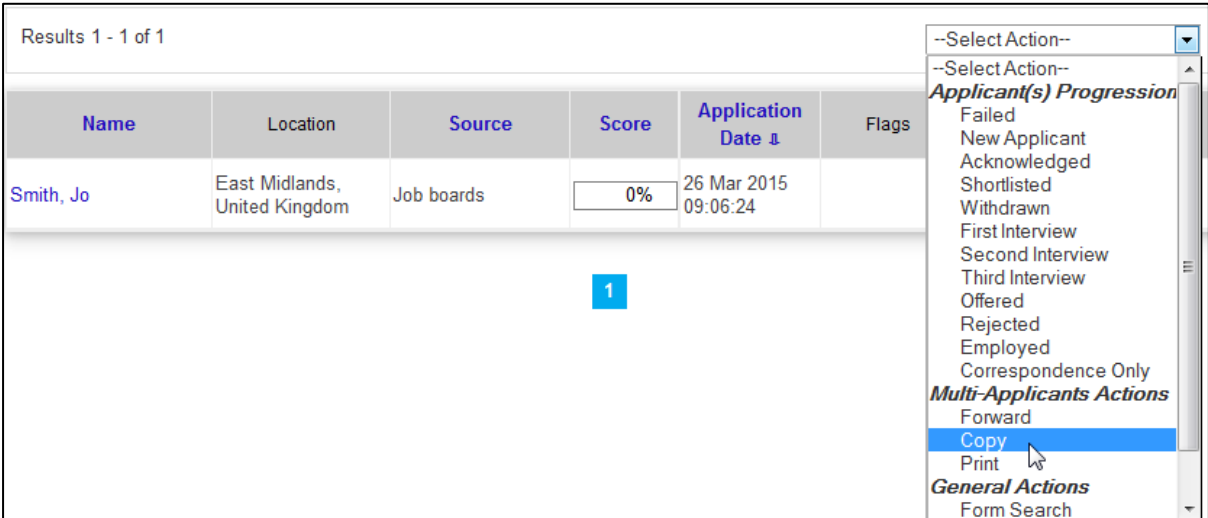
**Note:** All progression stages are recorded in the applicant's history, and any emails sent by the system can be viewed by clicking on the corresponding link within the Applicant History area of the Applicant Details page.

## Copying an applicant to another Job

You can copy an applicant to another job within the Candidate Manager system. This can be useful, for example if you notice an applicant who would be suitable for another job.

### How to copy an applicant to another Job:

1. Select Applicant(s) from the main menu.
2. Click on the number in the **Total Applicants** column for the job you want (or on the number in one of the other stage columns).
3. Tick the **Select checkbox** for the applicant(s) you want to copy. You can copy up to 50 applicants at the same time
4. Select **Copy** from the Action Dropdown



The screenshot displays a table with the following data:

Name	Location	Source	Score	Application Date ↓	Flags
Smith, Jo	East Midlands, United Kingdom	Job boards	0%	26 Mar 2015 09:06:24	

Below the table, a blue square with the number '1' is visible. To the right, an action dropdown menu is open, showing the following options:

- Select Action--
- Select Action--
- Applicant(s) Progression**
- Failed
- New Applicant
- Acknowledged
- Shortlisted
- Withdrawn
- First Interview
- Second Interview
- Third Interview
- Offered
- Rejected
- Employed
- Correspondence Only
- Multi-Applicants Actions**
- Forward
- Copy** (highlighted)
- Print
- General Actions**
- Form Search

5. Select the job you want to copy the applicant(s) to on the Copy a candidate to another job Page.
  - You can filter the jobs listed by job status.
  - When the job is selected, the default application form for the job will be displayed. You can select the form type from the Form Type drop-down menu.

6. Fill in the application form for the applicant(s)  
OR  
Tick the checkbox indicated to copy the applicants **without filling in the application form**.
7. Click **Copy Candidate** to submit the applicant(s) to the new job.  
A Duplicate Applicant Icon (**D**) and Copied Applicant icon (**C**) will be displayed next to the applicant on the applicant Summary page for jobs they have been copied to, and a Duplicate Applicant icon for the job they originally applied for.

## Forwarding the details of an applicant

In Candidate Manager, you can forward the details of an applicant to any email address. This can be useful, for example if you want to forward an applicant's details to another hiring manager or any other employee within your organization.

### How to forward details of an applicant:

1. Select Applicant(s) from the main menu.
2. Click on the number in the **Total Applicants** column for the job you want (or on the number in one of the other stage columns).
3. Tick the **Select checkbox** for the applicant(s) you want to forward. You can forward up to 50 applicants at the same time.
4. Select **Forward Details** from the **Actions** drop-down menu

The screenshot shows a table with the following data:

Name	Location	Source	Score	Application Date	Flags
Smith, Jo	East Midlands, United Kingdom	Job boards	0%	26 Mar 2015 09:06:24	

Below the table, there is a blue square containing the number '1'. To the right of the table, an actions dropdown menu is open, showing the following options:

- Select Action--
- Select Action--
- Applicant(s) Progression**
- Failed
- New Applicant
- Acknowledged
- Shortlisted
- Withdrawn
- First Interview
- Second Interview
- Third Interview
- Offered
- Rejected
- Employed
- Correspondence Only
- Multi-Applicants Actions**
- Forward** (highlighted)
- Copy
- Print
- General Actions**
- Form Search

**Forward Applicant**

Applicant(s) Jo Smith

Recipients \* [+ Add](#)

Bulk Emails

From

Subject

Comments

Options  Select this for Free text email (without HTML tags)

Attach CV/Resume(s)  Attach Application Forms  Attach Comments

Attachments  No file selected.

No file selected.

No file selected.

- You can select one or more hiring managers by clicking the Send to Hiring Managers link and selecting the hiring managers in the new window.

5. Fill in all applicable fields on the Forward Applicant page. Mandatory fields are marked with an asterisk (\*).

**Note:** Only those hiring managers with access to the same **division or business unit** can be selected.

**Note:** If you select hiring managers from the list, they will receive an email asking them to log into the system and review the applicant details.

6. Click **Send** to send the details to the selected recipients. A forward icon will be displayed next to the applicant to indicate that the details have been forwarded.

## Adding notes to an applicant's profile

You can add notes to an applicant within Candidate Manager. Any notes you add will be displayed in the Applicant/Notes History region on the Applicant Details page.

### How to add notes to an applicant:

1. Select **Applicant(s)** from the main menu.
2. Click on the number in the **Total Applicants** column for the job you want (or on the number in one of the other stage columns).
3. Click on the name of the applicant and scroll down to the **Applicant/Notes History** region

Date	Creator	Type	Actions
26/03/2015 10:33:54	emma.devlin@candidatemanager.net	Shortlisted	✘
26/03/2015 09:06:26	CM	✉ Acknowledged	✘
26/03/2015 09:06:26	CM	New Applicant	✘

4. Choose one of the following options:

- Upload notes from a file on your local machine by clicking Browse... and selecting the file.

**Note:** The file you upload must be no larger than 750 kB in size, and must be one of the following formats: \*.docx, \*.pdf, \*.txt, \*.xls, \*.rtf, \*.doc.

OR

- Enter your notes into the Notes field.
  - Click Submit.
5. The submitted notes will be displayed in the **Applicant/Notes History** region of the applicant's details with the time and date they were submitted, and any attachments can be viewed by clicking on the corresponding link.

## Viewing an applicant's CV

Candidate Manager allows you to view applicants' CVs and save them to your local machine.

### How to view an applicant's CV:

1. Select **Applicant(s)** from the main menu
2. Click on the number in the **Total Applicants** column for the job you want (or on the number in one of the other stage columns).
3. Click into an Applicants profile
4. Click the **CV** icon located at the Top of their profile. The **application form** is also location beside the CV for downloading.



## Form Builder Module

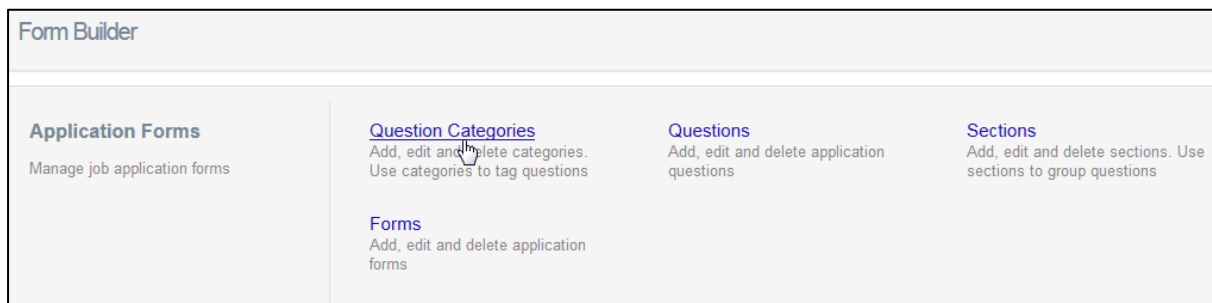
The Form Builder module is used to create questions and compile application forms for applicants to fill out when applying for jobs. If the optional Equality and/or Screening features are activated for your account, they will be included in and managed through this module.

### Managing Question categories

**Question categories** are used for filtering and grouping questions. This makes it easier to find specific questions when creating application forms.

#### How to view existing question categories:

1. Select **Form builder >Application Form > Question Categories** from the main menu



- This summary page lists all question categories currently available in Candidate Manager.

#### How to create a new question category

1. Click **Create new** on the Question category page
2. Fill in the **Category** title and **Category description** field on the category page
3. Click **Save details**
4. In order to **Edit** the category click on the category name on the main category list page
5. If you would like to **delete** any category's click on the **delete icon** under action

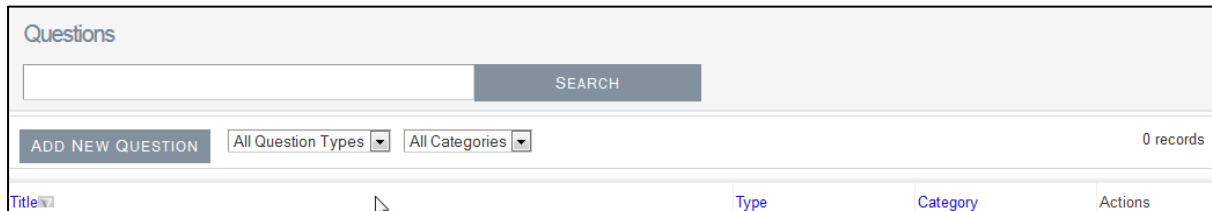
## Managing Questions

Questions are the basis for any application form. Candidate Manager offers six different types of question to choose from:

<b>Yes/No</b>	This type of question is self-explanatory and is used to get one of two pre-defined Answers. For example: Do you hold a valid driver's license?
<b>Free Text</b>	A free text question type is used to gather information from the applicant. If selected, you must define the size of the free text field displayed on the application form by the number of lines of text. For example: What are your strengths and weaknesses?
<b>Multiple Choice</b>	This is used when you have a list of pre-defined answers which the applicant must Select from. If selected, you must define the available options and the order in which they are to be displayed. For example: How many years' experience do you have?
<b>Multi-Select</b>	This is used when you have a list of possible answers and the applicant is able to Select more than one answer. If selected, you must define the available options and the order in which they are to be displayed. For example: Please select one or more areas you are interested in working in?
<b>Preference</b>	This question type is used to gather an applicant's order of preference for Something. If selected, you must define the available options, the default order in Which they are to be displayed, and the number of preferences that are to be saved. For example: In order of preference, which of the following locations would suit you for an interview?
<b>Date</b>	This type is used to record a specific date. For example: What date are you available to commence employment?

## How to view existing questions:

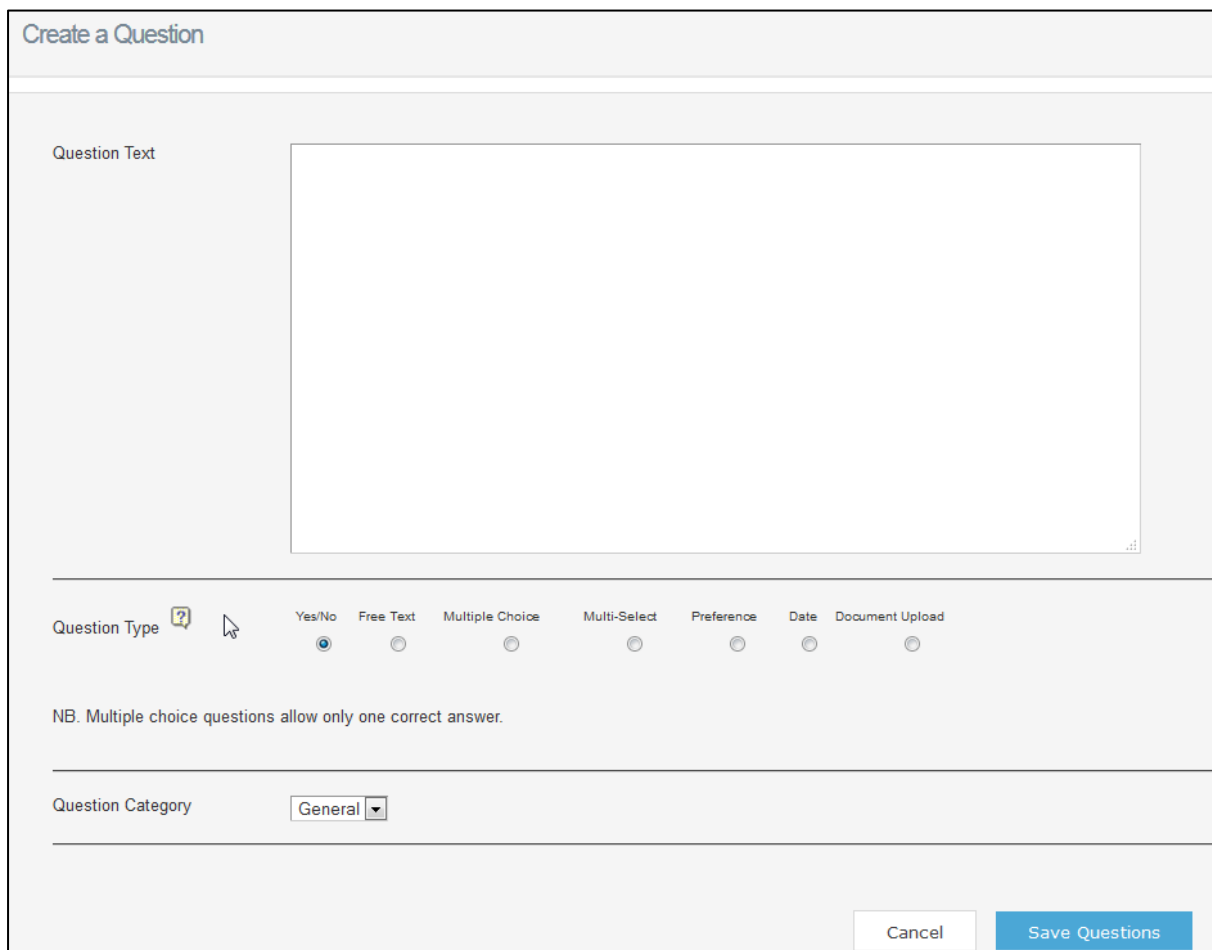
1. Select **Form builder >Application Form > Questions** from the main menu
2. This summary page lists all questions currently available in Candidate Manager.
  - You can sort the questions alphabetically according to **Title, Type or Category.**
  - You can filter the questions displayed by type or category.
  - There is a search function for finding a specific question



The screenshot shows the 'Questions' summary page. At the top, there is a search bar with a 'SEARCH' button. Below the search bar, there is a button labeled 'ADD NEW QUESTION' and two dropdown menus: 'All Question Types' and 'All Categories'. On the right side, it says '0 records'. At the bottom, there is a table header with columns: 'Title', 'Type', 'Category', and 'Actions'.

## How to create a new question

1. Click **Add New Question** on the Question summary page. This will open a new Add/Edit Question page



The screenshot shows the 'Create a Question' page. It has a large text area labeled 'Question Text'. Below the text area, there is a 'Question Type' section with a help icon and a mouse cursor. The options are: Yes/No (selected), Free Text, Multiple Choice, Multi-Select, Preference, Date, and Document Upload. Below this, there is a note: 'NB. Multiple choice questions allow only one correct answer.' At the bottom, there is a 'Question Category' dropdown menu set to 'General'. At the very bottom, there are two buttons: 'Cancel' and 'Save Questions'.

2. Enter the text of your question in the **Question Text** field.
3. Select the **type of question**. The available options are listed in the above table.
4. Select the **Question Category** under which the question will be listed.
5. Click **Save question**



## How to edit and existing Question

1. Click on the question you wish to edit.
2. Edit the fields on the **Add/Edit** Question page.
3. Click **Save Question**

## How to delete an existing question

1. Click on the **Delete icon** in the Actions column for the question.
2. Click **OK** in the confirmation dialog

### Note:

You cannot delete a question that is included on an application form.

If you want to delete a question that is attached to a form, you must first remove it from all forms.

## How to create an application form

1. Select **Form builder >Application Form > Form** from the main menu
2. Click **Add Form** on the Application Form summary page. This will open a new Add/Edit Form page.

Create New Application Form

**Form Details** (Hidden from applicants)

Name \*

Type \* External Application Form

Description \*

**Form Content** (Visible to applicants)

Form Header (Max 500 Characters)

Form Body \*

1. Available Questions ( Hide Filter)

--All Question Categories--

(Y/N) Are there any gaps in your qualificab...

(Y/N) Are you a Sun Certified Java Program...

(Y/N) Are you a UK Citizen

(Y/N) Are you able to provide proof of per...

(Y/N) Are you able to supply employment...

(Y/N) Are you ACCA Qualified ?

(Y/N) Are you an Indian Citizen?

(Y/N) Are you aware of any adverse credit

(Y/N) Are you ordinarily resident in the UK?

(Y/N) Are you eligible to work in the Repub...

(Y/N) Are you flexible in your working hour...

(Y/N) Are you ordinarily resident in the UK?

(Y/N) Are you prepared, as part of your ind...

(Y/N) Are you professionally qualified ?

(Y/N) Are you qualified (DVQ 3)?

(DU) Are you reg with HPC ?

(DU) Are you rep level 3 qualified ?

(Y/N) Are you res qualified

2. Available Sections

Admin Section

Basic Qualifying Questions

Business Analyst Roles

Claims Administrator Screening Questions

Electrician Application form

Electricians

A Personal Information section will be added automatically.

(Y/N) Do you speak any languages

(Y/N) Are you proficient in Microsoft Word

(MC) How many years experience within a related role do you have?

Form Footer (Max 500 Characters)

Cancel Next

3. Fill in all applicable fields. Mandatory fields are marked with an asterisk (\*).
4. Select the type of application form from the **Form Type** drop-down menu
  - The Header and Footer fields will be displayed on the published application form.
  - Select sections and/or questions to include in the application form by clicking on the items listed in the Available Sections and Available Questions panes, and then clicking the **right arrow button located in the middle** to add to the application form.
  - You can arrange the order of items included in the form by selecting the item and then clicking the up and down arrow buttons, and remove any items by clicking **the left arrow button**.
5. Click **Next** to proceed to the Rank Application Form Response page

Edit Application Form - Agency Application  
Details from approved supplier

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**Rank Application Form Response**  
By associating values, targets and points to your questions you will be able to make decisions on candidates more quickly and easily.

Form Pass Percentage:  %

Preferred Answers:

Type	Required	Question	Available Question Points	Answers	Knock Out	Scoring/Target
YN	<input checked="" type="checkbox"/>	Are you eligible to work in the UK?	<input type="text" value="10"/>	No Yes	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="radio"/> <input checked="" type="radio"/>
MC	<input checked="" type="checkbox"/>	When is your current notice period?	<input type="text" value="10"/>	None 1 to 2 weeks 2 to 4 weeks More than 4 weeks	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text" value="0%"/> <input type="text" value="0%"/> <input type="text" value="0%"/> <input type="text" value="0%"/>
YN	<input checked="" type="checkbox"/>	Are you able to provide proof of permission to work in the UK e.g. passport, visa, permit, registration?	<input type="text" value="10"/>	No Yes	<input type="checkbox"/> <input type="checkbox"/>	<input type="radio"/> <input type="radio"/>
YN	<input checked="" type="checkbox"/>	Are you eligible to work in the Republic of Ireland?	<input type="text" value="10"/>	No Yes	<input type="checkbox"/> <input type="checkbox"/>	<input type="radio"/> <input type="radio"/>
YN	<input checked="" type="checkbox"/>	Do you have any previous criminal convictions?	<input type="text" value="10"/>	No Yes	<input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="radio"/> <input type="radio"/>
YN	<input checked="" type="checkbox"/>	Are you a UK Citizen	<input type="text" value="30"/>	No Yes	<input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="radio"/> <input checked="" type="radio"/>
MC	<input checked="" type="checkbox"/>	How many years previous administration experience do you have?	<input type="text" value="20"/>	Less than 2 years 2 to 4 years 5 years or more	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="text" value="0%"/> <input type="text" value="0%"/> <input type="text" value="0%"/>

Total Form Score Points 100  
Points Required To Pass 60

- Applicant ranking is displayed on the Applicant Summary page, and is calculated based on the priority and weighting of questions given on the application form attached to the job.
6. Fill in the necessary details for the questions in the Preferred Answers region. The values entered on this page affect the applicant ranking for each person applying for a job that uses the application form.
    - To make a question optional (i.e. the application form will be submitted even if no answer is provided), uncheck the Mandatory checkbox for that question.

7. Click the **Preview** button to see a preview of the application form
8. Click **Save** to save the application form

**Note:** Standard questions such as name, address, contact details etc. are automatically included on all application forms and do not need to be added. If no application form is attached to a job, these standard questions will still be asked.

### How to Edit an Existing application form

1. Click on the **Application form** you would like to Edit
2. **Add/remove** questions as necessary
3. Click **Next** to proceed to the Rank Application Form Response page. Edit the fields on the Rank Application Form Response page as necessary.
4. Click **Save**.

**Note:** If you edit a form that is attached to a job, you need to **reattach** the new version of the application form to the job by editing and saving the **(live)** job for the changes to be applied.

**Note:** If you need to edit wording of questions this needs to be done prior to changing the application form.

### How to copy an existing application form

1. Click on the **Copy icon** in the Actions column for the application form. This will open a new **Add/Edit Form page**, where all fields will contain the same information as the original application form. The contents of the Name and Descriptive Text fields will be prefixed with the text 'Copy of'.
2. Edit **the fields** on the Add/Edit Form page as necessary.
3. Click **Next** to proceed to the Rank Application Form Response page.
4. Edit the fields on the **Rank Application Form** Response page as necessary.
5. Click **Save**

## Reports Module

The Reports module is where you can run a wide range of reports regarding jobs, applicants, users or equality statistics. You can also save reports and schedule them to be run periodically, or export them as Word or Excel documents.

### To Access the Reports module:

1. Select **Reports** in the main menu

### How to Run a Report:

1. Click on the Report you would like to run
2. Click the **Select fields** to select the fields included in the report
3. Select the **Filters** you would like to see in your report

4. Enter specific **Date** range
5. Select if you require a **Once off** or **Schedule** the report
6. Click **Create Report**

The screenshot shows the 'Reports' interface with the 'Completed Reports' tab selected. A green notification box at the top states: 'The report generation will start shortly. You will be notified by email once it has completed.' Below this is a table with the following data:

Date	Report	Status	Download	Actions
26 Mar 2015	Job Status Report Division=All Business Unit=All	Pending		<a href="#">Delete</a>

Refresh Status

Completed reports are available for download for 30 days.

The reports are categorized into **five** categories:

- Job Reports,
- Applicant Reports,
- User Reports,
- Equality Reports (only visible if you have the Equality optional feature enabled)

Once you create a report it will **run in the background** and you will receive an email letting you know when the report has complete. This allows you to continue to work and come back at once complete.

If you **Schedule reports** to run at specific time a week you can **edit the filters** within this report by clicking into Scheduled reports beside completed reports and clicking Edit.

The screenshot shows the 'Reports' interface with the 'Scheduled Reports' tab selected. A green notification box at the top states: 'The report will be generated Every Day starting on 27 March 2015.' Below this is a table with the following data:

Next Run	Report	Frequency	Run (# of times)	Actions
27 Mar 2015	Job Status Report Division=All Business Unit=All	Every Day	0 time(s)	<a href="#">Edit</a>   <a href="#">Delete</a>

Most of the available reports conform to a standard format, which enables the selection of output, fields and filters.

### Job Status Report

Lists jobs by status, division, media, time frame and most advanced applicant status.

#### Select Fields

Fields \*

Select all fields

- Job Status
- Job Type
- Date Opened
- Days Open
- Division
- Business Unit
- Recruitment Contact
- Hiring Manager
- Total Applicants
- Failed
- New

#### Select Filters

Job Status

Division  Select all fields

## Settings Module

### Managing Divisions

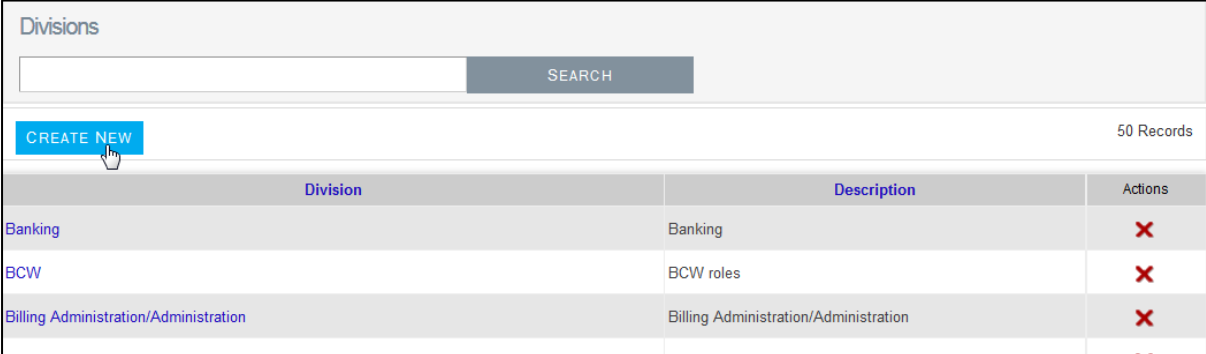
Divisions are used in Candidate Manager to correspond to the divisions within your organization. They are used throughout the system for grouping specific jobs and users together and restricting the access of users belonging to other divisions. Divisions are also used for filtering purposes in Reports.

#### How to view existing divisions:

1. Select **Settings > Divisions** from the main menu.  
This summary page lists all divisions currently available in Candidate Manager.

#### How to create a new division

1. Click **Create new** on the Division admin summary page
2. Fill in the **Division (title)** and Division description fields on the **Add/Edit** Division page.



Divisions		
<input type="text"/>		SEARCH
<a href="#">CREATE NEW</a>		50 Records
Division	Description	Actions
Banking	Banking	✘
BCW	BCW roles	✘
Billing Administration/Administration	Billing Administration/Administration	✘

3. Click **Save** details

### Managing Business units

#### How to view existing Business units:

1. Select **Settings > Business Units** from the main menu.  
This summary page lists all Business units currently available in Candidate Manager.

#### How to create a new Business Unit

1. Click **Create new** on the Business unit admin summary page
2. Fill in the **Business unit (title)** and Division description fields on the **Add/Edit** Division page.
3. Click **Save** Details

#### How to edit existing Division-Business units:

1. Click on the Division/Business unit you wish to edit.
2. Edit the **Division/Business unit** Fields on the **Add/Edit** Division page.
3. Click **save Question**

## Changing your password

You can change the password for your username in Candidate Manager. This can be necessary, for example if your username/password has been reset by an administrator and you have been given a temporary password.

### How to change your password:

1. Select **Settings**
2. Change **Password** from the main menu.
3. The **Change Password** page will open

#### Change Password

Old Password \*

New Password \*

Confirm New Password \*

- The password should contain a combination of letters and numbers. The following special characters are also permitted (\*#+-\|/%\$!@~?|()\_ = ^ £ " &)
- The password should be between 8 and 25 characters in length.

\* Fields marked are required

Cancel Submit

4. Enter the **new password** in the New Password and Confirm New Password fields. The password must be exactly the same in both fields and must be between 8 and 10 characters in length.
5. Click **Submit** to change the password.