Recruiting: Manage Candidates

Manager

CANDIDATE ACTIONS

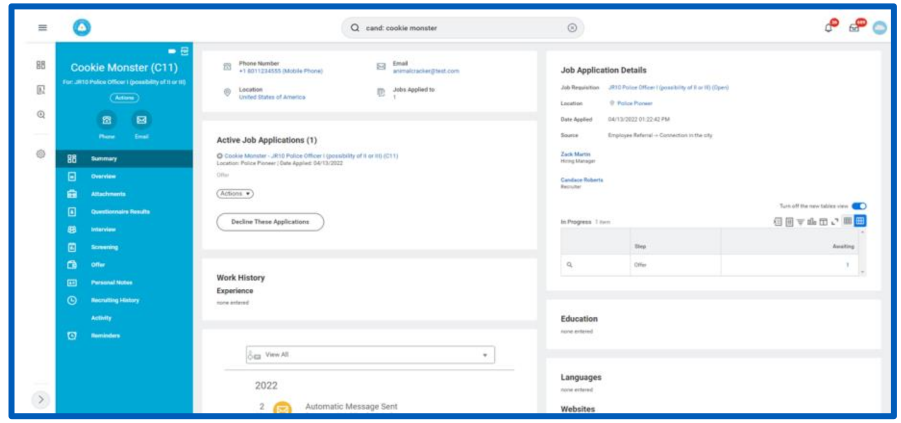
Once you enter a prospect or candidate in Workday, there are various actions you can take on their record, depending on your role. These include:

- Candidate Communication
- Copy Job Application
- Create Job Application
- Invite to Apply
- Move Candidate
- Move to Linked Evergreen
- Move to Linked Job Requisition
- Reactivate Job Application
- Send Message
- Set Withdrawn Status
- Share Candidate
- Undo Move
- Create Reminder

NAVIGATE CANDIDATE TABS

From the Recruiting application, in the Actions section, access your candidates by selecting the **My Candidates** button, then choose a candidate's name. Each candidate is attached to a record.

Candidate Record



Within this record, Workday organizes the information into tabs and subtabs, including:

- Summary
- Overview
  - Overview (Work Experience, Education, Skills, etc.)
  - Referral Details
  - Candidate Communication
  - Tags / Pools
- Attachments
- Questionnaire Results
  - Answers to Questions within Job Application
- Interview
  - Interview Schedule
  - Interview Feedback
- Screening
  - Assessments

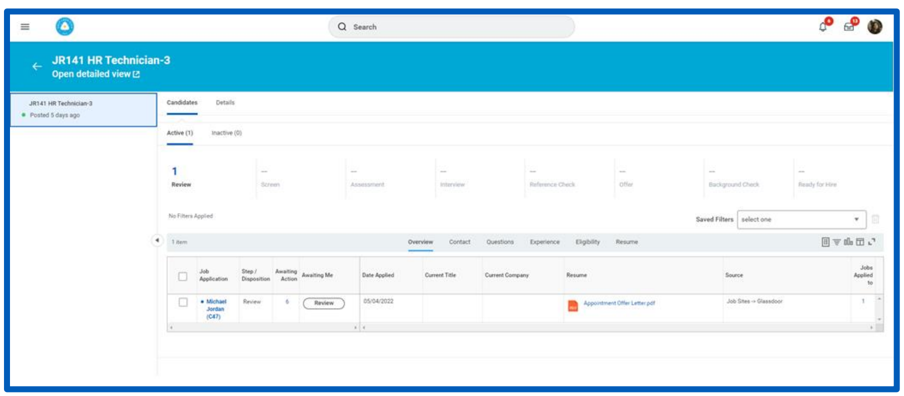
- Background Check History
- References

- Employment Offer
  - Employment Offer Details
  - Attachments
- Personal Notes
- Recruiting History
- Activity
- Reminders
  - Upcoming
  - Completed

ANALYZE CANDIDATES

From the Home page:

1. Select **Job Requisition Workspace** Application
2. Choose the Job Requisition for which you would like to review candidates by selecting the **Job Req Title** on the left-hand side of the screen



From here, review Active and/or Inactive candidates, including viewing Resume attachments and candidate contact information.

Note: To learn more about a specific candidate, click their name to be taken to their candidate profile.

Move candidates forward or decline them by selecting the appropriate action in "Awaiting Me" column or from their candidate profile.

SEND CANDIDATES A MESSAGE

Communication from an organization to a candidate through Workday is archived and searchable.

From the Home page:

1. Select **View All Apps**.
2. Choose the **My Recruiting Jobs - Recruiter** application.
3. Select the **Job Requisition** link.
4. From the Overview tab, select **Review Candidates**.
5. Select the **checkbox** next to the desired candidate and select the **Send Message** button.
6. On the Send Message pop up window, select at least one option in the **Contact Method** field. Optionally, you can create and choose a Message Template.
7. In the Email section, enter a **Subject** and **Body**.
8. Review your message and select **OK** to send.

Note: To view your communication, search for the candidate. From the candidate's profile page, select the candidate's Related Actions, and select Candidate Actions > Candidate Communication.

MANAGE CANDIDATE LIST

Follow these steps to perform mass actions from the Candidate List.

TO MOVE FORWARD MULTIPLE CANDIDATES AT ONCE

From the Recruiting application:

1. Choose **Job Requisition**.
2. Choose a job requisition from the list and select **OK**.
3. From the Overview tab, select **Review Candidates**.
4. Select the **checkbox** next to the desired candidate or candidates and select the **Move Forward** button.
5. From the *Move Selected Candidates to Next Stage* list, choose an option and select **OK**.

TO DECLINE MULTIPLE CANDIDATES AT ONCE

From the Recruiting application:

1. Choose **My Open Job Requisitions – Recruiter**.
2. Choose the requisition you are performing a mass action on.
3. Select the **Candidates** tab.
4. Select **All Active Candidates**, then select the **checkbox** next to the candidates you want to decline.

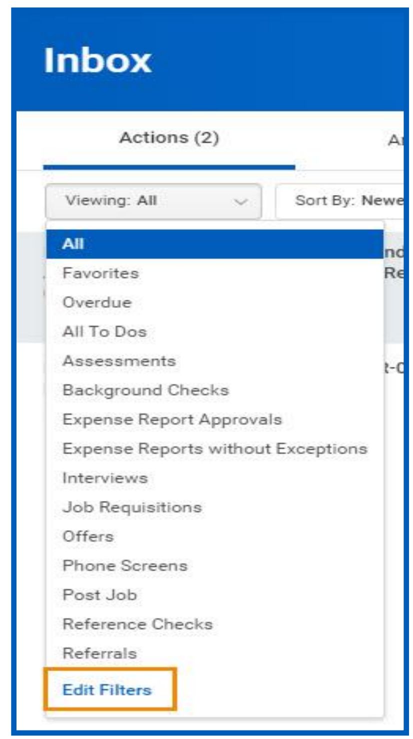
> Note: For candidates in the review stage, you can mass Move Forward to the next step (screen, interview, etc.). Move candidates past the review stage by opening their Candidate profile and selecting the **Move Forward** button. If this button is not available, then the candidate has remaining steps to perform. The Awaiting Action status on the candidate process details tab will indicate who should complete the next action.

5. Select **Decline** and then choose a Disposition Reason.
6. Select **OK**.

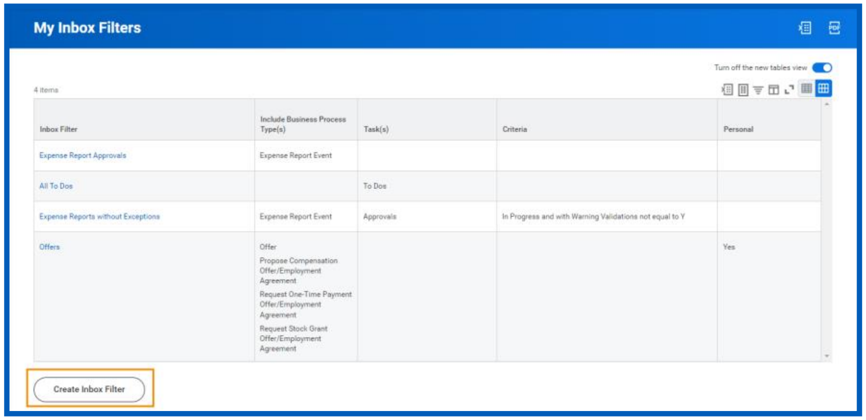
INBOX FILTERS

An Inbox filter enables you to limit the action items visible in your Inbox. You can create a personal Inbox filter that is available only to you. Also, an administrator can create a system filter available to defined security groups.

1. In the upper right corner, select the **Inbox** icon.
2. Select the **Viewing: All** pull-down list and choose **Edit Filters**.



3. Select **Create Inbox Filter**.



4. Enter a description for the filter, such as *Recruiting*.
5. Select whether to use this filter for all business processes or for specific ones, such as Assess Candidate, Background Check, Interview, Job Application, Propose Compensation Offer, Reference Check, and Screen.
6. Select a task if you want to filter by Common Tasks (Approvals, Attach Document, or To Dos), by Business Process Type, or by Tasks in Inbox.
7. Select a Source External Field, Relational Operator, Comparison Type, and Comparison Value in the Conditions table (e.g., All Locations for Job Requisition, Exact match with the selection list, and Value specified in this filter). Your selection will vary based on the criteria needed for the filter.
8. Select **OK** and **Done**.

VALIDATE FILTERS

1. Navigate to the **Inbox**.
2. Select the **Viewing: All** pull-down list and select the newly named filter.
3. Scroll through the list of Inbox items and validate that the items listed are only the items you have indicated.