

SHORT VIDEOS FOR LEARNING

Create Search Folders: [View video](#)

Send Candidates to Folders: [View video](#)

Remove Candidates from Folders: [View video](#)

Boolean Search Quick Guide: [Guide PDF](#)

OVERVIEW

Folders (also called search folders) are a user-defined folder system that allows you to store search results and share candidate profiles. Folders can be marked as private or shared. Candidates can be placed (a.k.a., point or tag) into folders. This action does not duplicate candidate profiles – a tag is assigned to the profile(s) that are inside the folder.

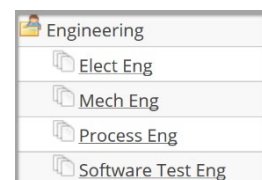
- **Private folders** are specific to the user who is logged in. Each user can define his or her set of private search folders.
- **Shared folders** are not specific to an individual user. Permissions may be applied to the shared folder to control access.

Note: Shared folders are enabled for Recruiting Managers and Recruiter roles. However, folders are an *optional* feature for Hiring Managers. Contact Support@silkroad.com to enable this feature for Hiring Managers.

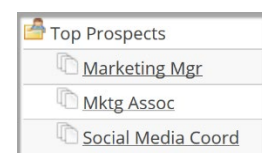
WHY USE FOLDERS?

Use *Folders* to categorize your folder system and organize where you “point” the candidate profiles. You can modify and remove folders as often as needed.

Example 1: You may choose to create a top folder named “Engineering” and create sub folders (groups) based on type of Engineers (e.g., IE, EE, PE, ME, RE, AE) or add breakdowns by Regions/States (e.g., Florida or Southwest Region). Place (point) candidates into the folders.

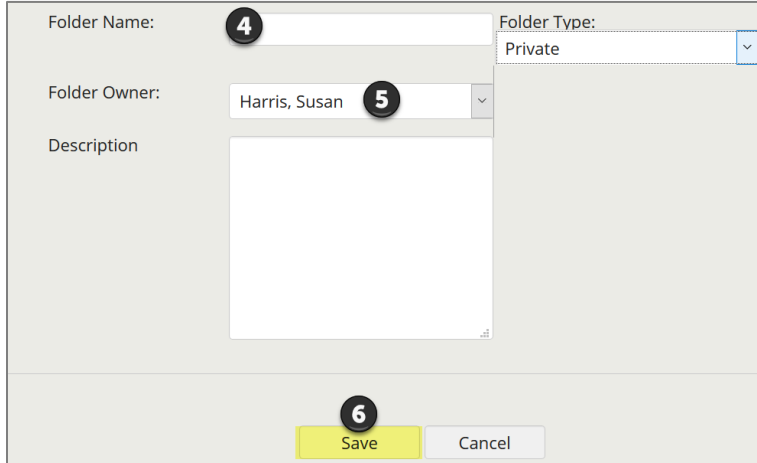


Example 2: When pre-sourcing in your ATS (i.e., the jobs are not posted but they are requisitions going through the approval process) to staff an entire new Marketing Department at a new business location. Place (point) candidates into the folders.






CREATE PRIVATE FOLDERS

1. Expand the **Candidates** menu.
2. Click **Folders**.
3. Click **New Folder**.
4. Enter a **Folder Name** and **Description** (*optional*).
5. Select/Confirm **Folder Owner**. Change owner, if necessary.
6. Click **Save**.

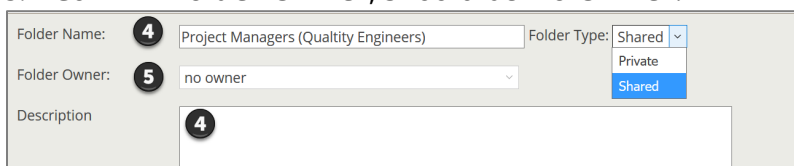


Note: Click **Edit** next to the folder name (refer to image shown below). You may choose to (1) rename the folder, (2) change the description of the folder, or (3) delete the folder. Permission limitations apply.

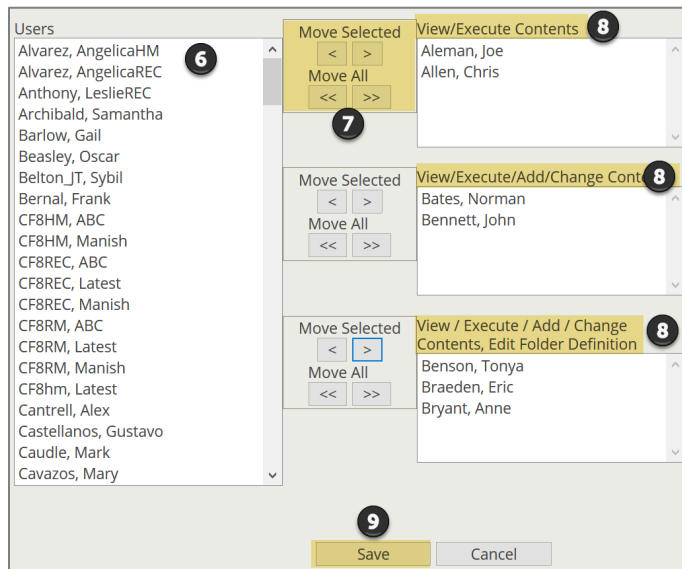
Shared Folders		
	Admin Assts	edit
	Top Prospects	edit
	Phlebotomist Associate	edit

CREATE SHARED FOLDERS

1. Expand the **Candidates** menu.
2. Click **Folders**.
3. Click **New Shared Folder**.
4. Enter a **Folder Name** and **Description** (*optional*).
5. Confirm **Folder Owner**, should be **No Owner**.



6. Select the **User(s)** at left.
7. Move selected user(s) < > or Move All users to *View/Execute Contents*. Hold down the Ctrl key to select more than one candidate.
8. Repeat steps 6-7 to move available users to the Permission Groups.
9. Click **Save**.



PERMISSION GROUPS DEFINED

View/Execute Contents: Allows a user to see the shared search folder and its contents. The user can run the searches and view resume groups residing in the search folder.

View/Execute/Add/Change Contents: Allows a user to see the shared search folder and its contents. The user can run the searches and view resume groups residing in the search folder. In addition, the user can save searches and groups to that folder.

View/Execute/Add/Change Contents, Edit Folder Definition: Allows a user to see the shared search folder and view its contents. The user can run the searches saved in the search folder and view resume groups. In addition, the user can save searches and groups to that folder and change the folder name.

PERFORM A CANDIDATE SEARCH

The search results can be “pointed” to a private or shared folder.


1. Expand the **Candidate** menu.
2. Click **Advanced Search**.
3. Expand **Edit Search**.
4. Scroll down the page, click **Clear Filters**.
5. Enter Keyword(s) (Boolean search criteria and operators) and other selected filters that apply to the candidate search. (Refer to [Boolean Search Quick Guide](#) for details)
6. Scroll down the page, click **Apply Filters**. The search results appear at the bottom of the page.

**Steps continue in next section (or you may choose to use the steps below, separately).*

SEND SEARCH RESULTS TO A FOLDER (BULK, SEND MANY)

7. Place a **checkmark** next to the candidate name(s) you want to send to a folder.
 - A. Checkmark this box to *Select All* candidates within the search results, **or**
 - B. Checkmark a few candidates within the search results.

A	Candidate	Job Title	Current Stage
<input checked="" type="checkbox"/>	A. William Mariner	Billing Administrator Clone	Job Applicant
<input checked="" type="checkbox"/>	A.C. Manzano	Receptionist Associate	Viewed Candidates (consider for future)
<input checked="" type="checkbox"/>	AARON M ALBUCHER	Financial Analyst	Job Applicant
<input checked="" type="checkbox"/>	AARON M ALBUCHER	Cost Accountant	Viewed Candidates (consider for future)
<input checked="" type="checkbox"/>	AARON M ALBUCHER	Accounts Payable Clerk	Viewed Candidates (consider for future)

8. Click **Take Action** drop-down menu.
9. Select **Send To Folder**.
10. Click the **arrow button** .

[Take Action] 8

[Take Action] 10

CCE Correspondence

Change Disposition

Change Hiring Stage

Change Job Association

Delete Selected

Disqualify Selected

Qualify Selected

Resume Review/Forward Resume

Send To Folder 9

Send To Folder

Available Folders

New Folder 11

Define Folder Name * 12

Available Groups

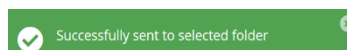
New Group 13

Define Group Name * 14

Close

Continue 15

11. Select a name from the **Available Folders** drop-down list. This is the top folder.
Note: Select an existing folder name from the list or enter a folder name into the *Define Folder Name* field.
12. Type a name in the **Define Folder Name** text box.
Note: Select an existing *Available Folders* name from the list, the system will require you to create a *Define Folder Name*. This will become a top folder.
13. Select a name from the **Available Groups** drop-down list. This is a sub folder. **Note:** Select an existing folder name from the list or enter a folder name into *Define Group Name*.
14. Type a name in the **Define Group Name** text box. **Note:** Select an existing *Available Groups* name from the list, the system will require you to create a *Define Group Name*. This will become a sub folder.
15. Click **Continue**. The toaster message appears (Successfully sent to selected folder).
16. The message automatically closes.



REMOVE CANDIDATES FROM FOLDER(S)

1. Expand the **Candidates** menu.
2. Click **Folders**.
3. Expand the folder, click on the subgroup name.
4. Place a **checkmark** next to the candidate name(s) you want to remove from this folder.
5. Click **Perform Recruiting Activity** drop-down menu.
6. Select **Remove from Folder**.

Note: Removing candidates from folders does NOT delete the candidates profile(s). This action removes the "tag." Therefore, the candidate will no longer be tied to this folder.

DELETE EXISTING FOLDER(S)

1. Expand the **Candidates** menu.
2. Click **Folders**.
3. Click **Edit** next to the folder name.
4. Click **Delete** (at bottom of screen).

Note: Users cannot delete a subgroup. The main folder can be deleted. This action will delete all subgroups and all contents.

Note: Deleting a folder also deletes all contents. This action does NOT delete a candidate profile.