



Recruiter and Recruiting Manager User Guide

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RIVAL

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Getting started

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About this guide

This guide describes Rival Recruit. It is intended for recruiting managers and recruiters who are responsible for recruiting-related tasks.

Rival Recruit overview

Rival Recruit is a fully encrypted, internet based, applicant tracking system (ATS) that helps your company:

- Execute the candidate hiring process from resume submission through hiring.
- Maintain central candidate records that can be seen and tracked by human resources, recruiters, and hiring managers.
- Analyze current practices and procedures so that the organization can improve the process, reduce costs, and increase return on investment.

Sign in

1. Navigate to your Rival Recruit instance.
2. Sign in using your username and password. (Password is case sensitive.)

Note: If you attempt to sign in five times consecutively with an incorrect username or password, you will be locked out for five minutes. You can then try to sign in again. If you are unable to sign in, use the *Forgot password* link to reset your password.

3. Click **Login**.

Reset forgotten password

1. From the Sign in page, click **Forgot password?** link.
2. On the Forgot password page, follow the directions on the page.
3. Click **Send**.

A system-generated email is sent and provides a link to reset your password.

Log out (Sign out)

- Use the **Log Out** link (top of the interface) to close your Rival Recruit session.

Note: After 59 minutes of inactivity, you are logged out automatically.

My Account

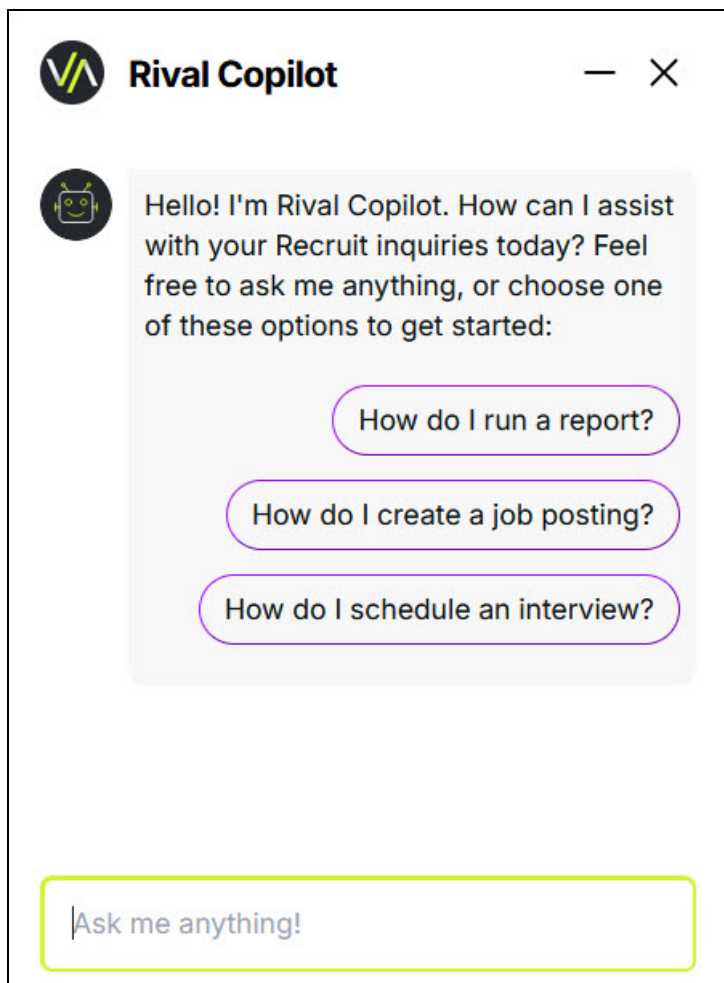
My Account contains information about your account:

- First and last name
- Location
- Preferred language, country, time zone (takes precedence over site defaults, if set)
- Phone and email address
- User name and password
- JobTarget information (if enabled)

From the header, click your user avatar, then click **My Account**.

Rival Copilot

Rival Copilot is a generative AI based question-and-answering system. Ask questions to get fast access to Help content so you can quickly learn product concepts, tackle your daily how-to tasks, and get clarity on head-scratching roadblocks.



Ask Rival Copilot

1. At the bottom right corner of the page, click .
2. Select an existing question or enter your question in the *Ask me anything* box:

Ask me anything!

Rival Copilot searches the Help system to find an answer. If an answer is available, Rival Copilot displays it and includes a link to the source topic in the Help system.

Provide feedback on Rival Copilot

You can provide feedback about your experience with Rival Copilot and add a rating. Rival will review your feedback.

1. At the bottom right corner of the page, click .
2. **Ask a question** (see "**Ask Rival Copilot**" on page 14).
3. Click  and then click the **Feedback** link.
4. Select a rating and click **Next**.
5. Enter comments and click **Submit**.

Support

For technical assistance for any of our solutions, contact our client support staff at:

Email: support@rival-hr.com

Web: <https://www.rivalcommunity.com>

Reporting & Analytics

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Reporting & Analytics overview

Reporting & Analytics provide the information you need to transform data into action, identify patterns, track performance, improve efficiency, and more. Analytics are combined with reporting to give you the best possible data to drive your business decisions. Explore and customize data using filters, data points, and visualizations.

Reporting & Analytics have these key features:

- **Homepage Analytics dashboard** (on page 20)
- **Standard reports** (see "**Standard reports (Analytics)**" on page 26)
- **Expanded Analytics** (on page 40)
- **Explore** (on page 41)

Tiers

Tiers control what a user can do in Analytics. Tiers are **assigned to a user profile** (see "**Assign a reporting tier to a user**" on page 16) by your system administrator.

Feature	Tier 1 Basic Reporting	Tier 2 Advanced Reporting	Tier 3 Premium Reporting
Access data	✓	✓	✓
See dashboards	✓	✓	✓
See Looks	✓	✓	✓
Download without limits	✓	✓	✓
Clear cache refresh		✓	✓
Explore (on page 41)		✓	✓
See user dashboards		✓	✓
See drill overlay		✓	✓

Feature	Tier 1 Basic Reporting	Tier 2 Advanced Reporting	Tier 3 Premium Reporting
Create forecasts		✓	✓
Create table calculations		✓	✓
Embed browse spaces		✓	✓
Embed saved shared space		✓	✓
Send outgoing webhook			✓
Send to integration			✓
Send to Amazon Simple Storage Service (Amazon S3)			✓
Sent to Secure Transfer Protocol (SFTP)			✓
Schedule external emails			✓

Assign a reporting tier to a user

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign a reporting tier to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Reporting Tier** and click .

The Assign Reporting Tier page opens.

5. Select a reporting **tier** (see "**Tiers**" on page 15).

Tip: If you do not want a user to have access to analytics, select **No Report Access**.

6. Click **Continue**.

View tier assignments

- This topic shows you how to quickly determine which tier is assigned to users.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. Click **Edit Search** to expand the filter panel.
3. From the Reporting Tier filter, select a tier.

4. Click **Apply Filters**.

The results list shows all the users who have the tier assignment you selected in step 3.

Quick look: Reporting & Analytics UI



The screenshot displays the '2007 and up - Candidate OFCCP/Affirmative Action EEO Data Extraction' report. At the top, there are filter controls for 'Hired Date' (set to 'is any time'), 'Qualified' (set to 'is any value'), and 'Job Company Location' (set to 'is any value'). A red box highlights these filters, with a red circle '1' next to it. To the right of the filters, there are icons for '1m ago', a refresh icon, and a settings icon, with red circles '2', '3', and '4' respectively. A red circle '5' is next to a menu icon. Below the filters, the report title '2007 and up - Candidate OFCCP/Affirmative Action EEO Data Extraction' is shown, with a red circle '9' next to it. The data is presented in a table with columns: 'Job ID', 'Job Internal Job Title', 'Job Company Location Name', and 'Job Department Name and Number'. The table contains 8 rows of data. Red circles '6', '7', and '8' highlight specific elements: '6' is next to the first row, '7' is next to the 'Job Internal Job Title' column header, and '8' is next to the 'Job Company Location Name' column header.

Job ID	Job Internal Job Title	Job Company Location Name	Job Department Name and Number
181940	Installation Technician II	GTCL	Implementation Service123 (SERV393)
182272	Sales Engineer		Engineering teams ENG-990 (ENG-990)
182272	Sales Engineer		Engineering teams ENG-990 (ENG-990)
183480	Branch Manager	Devonhaddon UK	Engineering teams ENG-990 (ENG-990)
190731	Regional Field Service Eng.	Syracuse Office	Human Resources (HR838)
190731	Regional Field Service Eng.	Syracuse Office	Human Resources (HR838)
190731	Regional Field Service Eng.	Syracuse Office	Human Resources (HR838)
190756	Account Manager	Jacksonville	Sales (SAL892)

Here's a quick look at some key elements of the Analytics/Reports UI:

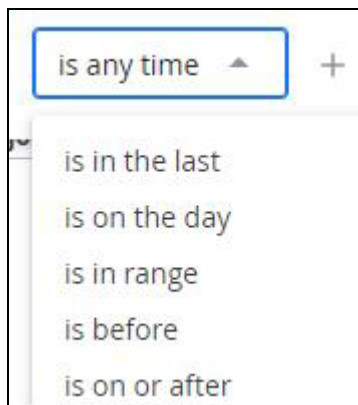
	Name	Description
1	Filters	Filters (on page 18) are used to select a subset of data. Filters vary by report. Some filters: ▶ Is any time: Select a date range. Click + to add additional date ranges (Or operand). ▶ Is any value: Select a value from a drop-down list.
2	Last refresh	Shows when the report data was last refreshed.
3	Refresh	Click to refresh the report to get the most up-to-date data.
4	Show/hide filters	Click to show or hide filters.
	Dashboard actions	Click  to view dashboard actions (on page 18).
6	Data grid	Shows the report data.
7	Column actions	Click  on a column heading to view column actions (on page 20).
8	Column sort	Click  to sort column in ascending or descending order.
9	Tile actions	Click  to view tile actions (on page 19).

Filters

Filters appear at the top of a visualization. They are used to select a subset of data. Filters vary based on the visualization.



Click a filter to view and select an option:

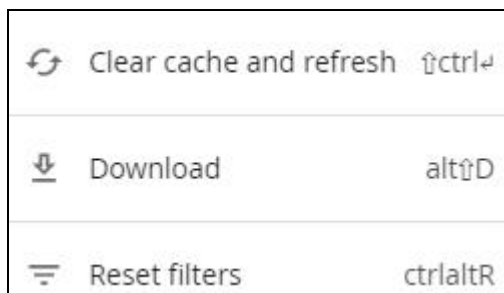


Date range filters have a plus sign. Click **+** to add "Or" date ranges.

Dashboard actions

Dashboard actions are available when you click **⋮** on a dashboard.

Tip: Action options are controlled by the **tier** (see "**Tiers**" on page 15) assigned to your user profile.

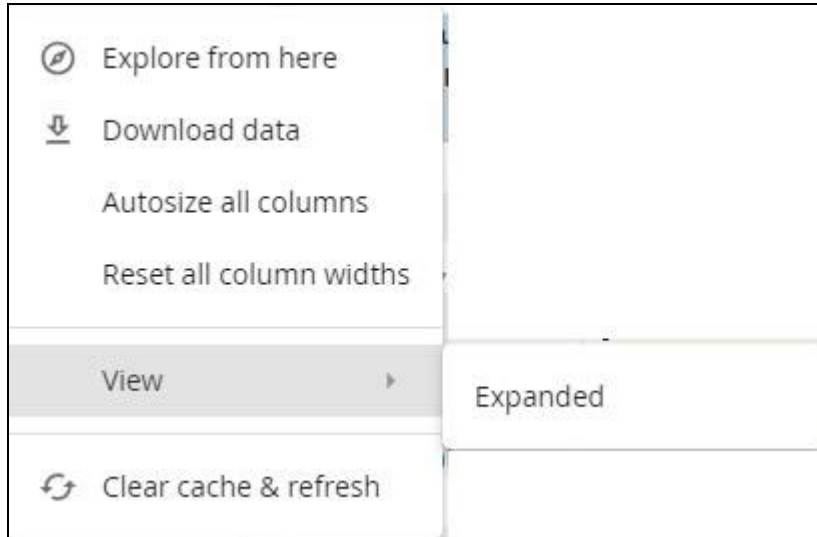


This action:	Does this:
Clear cache & refresh	Clears the cache and refreshes the data.
Download	Downloads the report to your computer.
Reset filters	Change any of the filters to get a different take on the report. From the dashboard menu, click  to update/reload report results.

Tile actions

Tile actions are available when you click  on a tile.

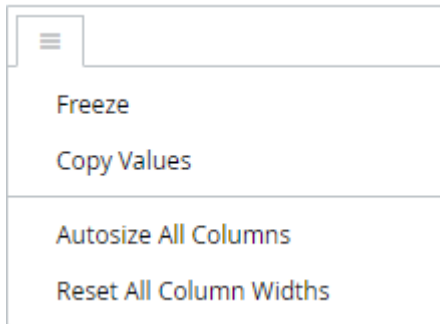
Tip: Action options are controlled by the **tier** (see "**Tiers**" on page 15) assigned to your user profile.



This action:	Does this:
Explore from here	Opens Explore (on page 41) so you can explore report data in depth.
Download data	Download report data into a format you select. From the dashboard menu, click  and select Download .
Autosize All Columns	To autosize columns, from the tile menu, click  and select Autosize all columns .
Reset All Column Widths	If you resized columns, reset sets them back to their original sizes. From the tile menu, click  and select Reset all column widths .
View Expanded	View the report in a pop-up with expanded columns. From the tile menu, click  and select View>Expanded .
Clear cache & refresh	Clears the cache and refreshes the data.

Column actions

Column actions are available when you click  on a column heading.



This action:	Does this:
Freeze	Freezes a table column to the left side of the chart. The frozen column remains visible on the left side during horizontal scrolling. Tip: Click Unfreeze to turn off freezing.
Copy Values	Copies the column header and all the values in the column, which can then be pasted into a spreadsheet, text file, or Looker filter.
Autosize All Columns	Autosizes all columns based on its longest data value.
Reset All Column Widths	Resets all column widths to their original size.

Homepage Analytics dashboard

This dashboard is for recruiting managers and recruiters. It's the landing page for those roles when they log in.

The dashboard is a collection of tiles, charts, and graphics that provide metrics and key performance indicators (KPIs) about your organization's recruitment process. The dashboard provides answers to some crucial recruitment questions you may encounter.

By default, a recruiting manager's dashboard shows information specific to their jobs and candidates. Recruiting managers can use the *View as Recruiter* filter to view by a specific recruiter or recruiting manager or use the All option to view information for all recruiters/recruiting managers.

Filters

These filters are available:

- **View as Recruiter:** Data can be filtered by recruiter, recruiter manager, or wide open for all recruiters/recruiter managers.
- **Workflow:** Data can be filtered by your organization's configured workflows.
- **Job Creation Date:** Data can be filtered by job creation date. Options are to include data from 12 months ago to today's date, 6 months ago to today's date, 3 months ago to today's date, and 1 month ago to today's date. (12 months ago is the default).

Tip: When Homepage Analytics dashboard loads the first time, the chart data is filtered by no workflow and jobs created since 12 months ago.

Charts, graphs, and tiles

Here's a summary of each chart, graph, and tile:

Chart/graph/tile	Description
Applications per Hire	Shows candidate applications per hire
Average Days Open	Show average days positions are open
Average Days to Hire	Shows average days to hire
Hires	Shows the candidates who are hired
Hires per Month	Shows the number of hires for jobs per month
Open Jobs	Shows open jobs
Offers Extended	Shows offers extended to candidates
Pipeline Efficiency of Hiring	Shows the average number of days that candidates reside in each of the hiring stages, before being moved to the next stage.
Recruitment Funnel	Shows the total number of candidates that currently reside in each hiring stage for any of the currently open job postings.
Resume Review	Shows information about resume reviews. Click a pie slice to go to the Review Status page. Here are the pie slice colors: ▶ Pink: Canceled reviews ▶ Purple: Declined reviews ▶ Green: Requested reviews ▶ Orange: Rescheduled reviews ▶ Blue: Completed reviews
Shared Hiring Stages	Shows the hiring stages and the number of candidates in each hiring stage.
Top 5 Applicant Sources	Top five sources (for your company) for candidates associated to active jobs. Click a listed source to view a candidate list for the selected source and access resume. Use the Advanced Search link to use additional search features.

Most of the tiles, charts, and graphs are interactive. Some open with prepopulated filters.

When you click	This page opens	With these prepopulated filters
Recruitment Funnel	Candidate Pool	▶ Current Stage: prepopulated with Hired stage ▶ Posting Status: prepopulated with these statuses: Executive, External, Internal, Limited, Normal ▶ Job Status: prepopulated with Open status ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there
Top 5 Applicant Sources	Candidate Pool	▶ Source: prepopulated with the source you clicked on in the pie-chart ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics dashboard ▶ Job Created Date: prepopulated with the date range you selected from the <i>Job created since</i> filter on the Homepage Analytics dashboard
Hires	Candidate Pool	▶ Current Stage: prepopulated with Hired stage ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there. ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics page ▶ Job Created Date: prepopulated with the date range you selected from the <i>Job created since</i> filter on the Homepage Analytics page.

When you click	This page opens	With these prepopulated filters
Hires per Month	Candidate Pool	▶ Hired Date: prepopulated with the date range of the month selected on the Homepage Analytics dashboard ▶ Current Stage: prepopulated with Hired stage ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics page ▶ Job Created Date: prepopulated with the date range you selected from the <i>Job created since</i> filter on the Homepage Analytics page
Shared Hiring Stages	Candidate Pool	▶ Current Stage: prepopulated with the current stage on selected pie chart slice. ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there. ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics dashboard. (If you selected the All option, then the filter is not pre-populated. It is blank.) ▶ Job Created Date: prepopulated with the date range you selected from the <i>Job created since</i> filter on the Homepage Analytics dashboard.
Applications Per Hire	Candidate Pool	▶ Job Filled: prepopulated with Yes ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics page ▶ Job Created Date: prepopulated with the date range you selected from the <i>Job created since</i> filter on the Homepage Analytics page

When you click	This page opens	With these prepopulated filters
Average Days Open	Jobs page	▶ Posting Status: prepopulated with these statuses: Executive, External, Internal, Limited, Normal ▶ Job Status: prepopulated with Open status ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics page ▶ Job Created Date: prepopulated with the date range you selected from the 'Job created since' filter on the Homepage Analytics page
Average Days to Hire	Jobs page	▶ Job Filled: prepopulated with Yes ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics page ▶ Job Created Date: prepopulated with the date range you selected from the 'Job created since' filter on the Homepage Analytics page

When you click	This page opens	With these prepopulated filters
Open Jobs	Jobs page	▶ Posting Status: prepopulated with these statuses: Executive, External, Internal, Limited, Normal ▶ Job Status: prepopulated with Open status ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics page ▶ Job Created Date: prepopulated with the date range you selected from the 'Job created since' filter on the Homepage Analytics page
Offers Extended	Candidate Pool	▶ Current Stage: prepopulated with Hired stage ▶ Hiring Workflow: prepopulated from the <i>Select a Workflow</i> filter on the Homepage Analytics dashboard if you made a selection there ▶ Recruiter: prepopulated with the recruiter you selected on the Homepage Analytics page ▶ Job Created Date: prepopulated with the date range you selected from the 'Job created since' filter on the Homepage Analytics page

View your Homepage Analytics dashboard

- From the navigation bar, click **Reporting & Analytics>Homepage Analytics**.

The **Homepage Analytics dashboard** (on page 20) opens.

View your Homepage Analytics dashboard

- Only recruiting managers can view other recruiter or recruiting manager's dashboard.

- From the navigation bar, click **Reporting & Analytics>Homepage Analytics**.

The **Homepage Analytics dashboard** (on page 20) opens.

- From the View as Recruiter drop-down, click a recruiter or recruiting manager or click **All** to view for all recruiters/recruiting managers.

Standard reports (Analytics)

Analytics comes with standard reports. The following table lists standard reports, their descriptions, and available filters.

Note: The reports that your system administrator **assigns** (see "**Manage report access for a role**" on page 267) to your user **role** (see "**Reporting roles**" on page 267) determines the reports you can access. You might not have access to all the reports shown below.

Report	Description	Filters
Active Job Postings	Provides information for all active jobs, including days old, furthest stage, assigned recruiter, recruiting manager, and hiring manager.	
Active Job Postings with Description	Provides basic information for all active jobs, including job description, department, location, and assigned hiring manager.	
Applicant Count By Job	Provides a total count of resumes received for every job for a specified date range (if a date range is applied).	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Resume Created Date
Applicant Count by Source	Provides a total count of resumes—broken down by source—received for every job for a specified date range (if a date range is applied). Also shows how many applicants per source were hired (Resume Hire Count column).	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Job Internal Job Title and Tracking Code Job Recruiter Job Hiring Manager

Report	Description	Filters
Applicant Log with Contact Information	Provides a list of candidates who entered the system (during a user-defined date range, if applied). The report includes candidate contact information, current stage, source, and basic details about the job the candidate is associated with.	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Job Internal Job Title and Tracking Code Job Recruiter Job Hiring Manager
Approved Requisitions	Provides information about each requisition created and approved within the user-defined requisition approved date range (if a date range is applied).	Job Company Location Job Department Requisition Creator Requisition Requested Date Hired (Yes or No)
Budget	Provides a quarterly and annual comparison of job budgets vs. hired salaries. The report can be filtered by company location, department, hiring manager, recruiter, and quarter/year.	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Job Budgeted Date

Report	Description	Filters
Candidate OFCCP/Affirmative Action EEO Data Extraction	Provides an extraction of raw candidate EEO data for candidates who entered the system from January 1, 2007 onward. The report outputs a single row for each candidate who is currently associated with a job where the job was closed within the user-defined hired date range (if a date range is applied). The closed date is based on the last date any candidate was moved into the Hired stage for the specified job. Tip: The report excludes any candidate who is not currently associated with a job.	Hired Date Qualified Job Company Location
Candidate OFCCP/Affirmative Action Statistics EEO	Provides a formatted statistical analysis of Affirmative Action data for candidates who entered the system from January 1, 2007 onward. The report counts all candidates currently associated with any job that was closed within the user-defined hired date range (if a date range is applied). Tip: The report excludes any candidate who is not currently associated with a job.	Hired Date Qualified Job Company Location
Detailed Candidate Information	Provides information about all applicants who entered the system during the user-defined date range (if a date range is provided).	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Job Internal Job Title and Tracking Code Job Active

Report	Description	Filters
Detailed Hired Candidate Information	Provides information about candidates who have been moved into the Hired stage during the user-defined date range (if a date range is provided).	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Job Internal Job Title and Tracking Code Job Active Hired Date
EEO Data	Shows EEO data for candidates who entered the system from January 1, 2007 onward.	Resume Created Date Qualified
Evergreen Job Postings	Provides information about a selected evergreen job posting and all the evergreen job postings that were cloned from that original evergreen job.	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Job Internal Job Title and Tracking Code
Expanded Analytics	This dashboard gets you started exploring your data. You can edit, slice and dice your reporting data to understand your recruitment funnel better.	Job Workflow Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Job Created Date

Report	Description	Filters
Fee Agency Vendor Information	Provides general information about fee agencies, the number of candidates submitted, and the number of candidates hired from their submittals.	Resume Created Date Fee Agency Active (Yes or No)
Filled Job Postings	Provides a lists all jobs with at least one candidate in the Hired stage, regardless of the date the job was posted. The report includes hired candidate names and hired dates. Tip: The date posted field is the date the job record was created in Rival Recruit.	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit
Hired Candidate EEO-1 Data	Provides an extraction of the candidate EEO data associated with <i>hired</i> candidates who entered the system from January 1, 2007 onward. The report outputs a single row for each candidate who was moved into the Hired stage during the user-defined hired date range (if a date range is applied).	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Hired Date
Hired Candidate EEO-1 Statistics	Provides a formatted version of the US Federal Government EEO-1 report. The report provides counts for all candidates who entered the system from January 1, 2007 onward and were moved into the Hired stage during the user-defined hired date range (if a date range is applied). Tip: Rival Recruit is not an HRIS system and does not keep stats on all current employees. This report only produces information for candidates hired through Rival Recruit.	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Hired Date

Report	Description	Filters
Hiree Export	Provides job and candidate information, including all candidate-related custom fields, for any candidate who was hired during the user-defined hire date range (if a hire date range is provided).	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Hired Date
Hiree Export (Alternate Version)	Provides an alternate version of the Hiree Export Report.	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Hired Date
Job Cycle Time Report	Shows a count of total jobs, filled jobs, number of hires, and average days to hire for each recruiter, filtered by the assigning recruiting manager.	Recruiting manager
Job Postings - Filled	Provides basic job and candidate information for all jobs where at least one candidate was moved to the Hired stage during a user-defined hired date range (if a range is applied).	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Hired Date

Report	Description	Filters
Job Postings Information	Provides basic job information for every job that was posted during a user-defined job posting date range (if a range is provided). The report also includes the name of every candidate for every job and the candidate's current stage.	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Job Posted Date
Job Statistics Candidate EEO	Provides EEO information of every candidate along with some basic information about each job posting.	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Resume Created Date Hired Date Job Internal Job Title and Tracking Code Hiring Stage Resume Current Stage Hired Qualified Job Active
Job Statistics EEO Gender-Ethnicity Breakdown	Provides the total number (per gender category) of candidates for their ethnic category. Also provides the grand total for each category.	Resume Created Date Job Internal Job Title and Tracking Code Hiring Stage Job Company Location Qualified Job Active

Report	Description	Filters
Job Statistics EEOC Category Breakdown	Provides the total count (broken down by AAP Job Group) for every gender, ethnicity, and disability category and the grand total for each of those categories. Provides the total number, broken down by AAP Job Group, for every gender, ethnicity, and disability category, as well as the grand total for each one of those categories.	Resume Created Date Job Internal Job Title and Tracking Code Hiring Stage Job Company Location Qualified Job Active
Job Templates	Provides details about all active and inactive job templates.	Job Template Active
New Hire Vets-100	Provides a statistical analysis of candidate Veteran information. The Vets-100 report is provided by OFCCP-compliant employers for new hires and existing employees. Our version accommodates only new hire data. The report provides counts for candidates who entered the system from January 1, 2007 onward and were moved into the Hired stage during the specified date range. To be included in the report, the candidate must be in the hired stage at the time the report is run.	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Hired Date
OFCCP-AAP Job Group Totals	Provides federal contractors with the totals for applicants, job openings, hires, and jobs filled per AAP Job Group. The job posted date filter returns jobs that have a posted date value within the user-defined date range (if provided). The total resume count number and resume hire count number (which is the number of candidates moved into the hired stage) are totaled separately. The job hires count represents the number of jobs where at least one candidate was moved into the hired stage and the position is closed.	Job Posted Date Job Company Location

Report	Description	Filters
OFCCP-Contractors Hiree Report	This is an OFCCP version of the Hiree Report. It includes information collected from the pre-offer and post-offer OFCCP Disability & Veteran Status information.	Hired Date Qualified Resume Full Name (Resume ID) Job Company Location
OFCCP Hiree Export Report (Alternate Version)	This is an OFCCP alternate version of the Hiree Export report designed for execution over longer date ranges. Tip: Because the Hiree Export contains many data columns, it can only be run for a maximum of two weeks of data. This alternate version can support up to 12 months of data and is run off an alternate (non-production) data source that is populated on a nightly basis. This means the report does not contain the current day's hired information.	Hired Date Qualified Resume Full Name (Resume ID) Job Company Location Job Business Unit
OFCCP-New Hire Vets-100a	Provides a statistical analysis of candidate veteran information reflecting the OFCCP's post-offer veteran identification values (VEVRAA final rule). The report is provided by OFCCP compliant for new hires/existing employees and accommodates new hire data. If a hired date range is applied to this report, the system searches for jobs with a resume closed date within that hired date range and has candidates who were moved into the hired stage.	Hired Date Job Company Location
OFCCP-New Hire Vets-4212	This report provides an aggregate total of candidate veteran information reflecting the OFCCP's post-offer veteran identification values (VEVRAA final rule). The report is provided by OFCCP compliant for new hires/existing employees and accommodates new hire data. The user-provided report date range filter searches jobs with a closed date during that period that has candidates in the Hired stage at the time the report is run.	Hired Date Job Company Location

Report	Description	Filters
OFCCP/EEO	Provides an extraction of raw candidate EEO and OFCCP data. The report outputs a single row for each candidate who is currently associated with a job where the resume hired close date falls within the hired date range of the report if a hired date range is selected. The resume hire close date of a job is based on the last date any candidate was moved into the Hired stage for a job. Note: This report does not include any candidates who are not linked to a job posting.	Job Company Location Job Department Job Business Unit Resume Created Date Resume Current Stage Resume Full Name (Resume ID) Qualified Hired Date
Offer Approvals	Provides offer approval information (resume offer created date, approver name, approval status, and approval date) for any job that falls within a user-define data range (if a date range is provided).	Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Offer Created Date

Report	Description	Filters
Stage Duration	Provides information about the average time candidates reside in each hiring stage. The report considers any candidate associated to any job that was posted during the user-defined date range (if provided). It then looks at all of those candidates and determines how long each candidate resided in each stage. Report is divided into multiple tables: Stage Duration: ▶ Shows average number of days candidates resided in each stage during the date range you selected and based on filters you selected. ▶ Job Posted Start Date field is required. If you do not select a date for the Job Posted End Date field, 12 months from the start date is used. Twelve months is also the maximum date range for report results. ▶ Results are sorted by sequence of the hiring stages.	Job Workflow Job Posted Date Job Internal Job Title and Tracking Code Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit

Report	Description	Filters
Stage Duration (continued)	Stage Duration Grouped By Department: ▶ Results are grouped department and sorted by sequence of the stages, followed by decreasing average number of days in the stage. Stage Duration Grouped by Job: ▶ Results are grouped by job and sorted by sequence of the stages, followed by decreasing average number of days in the stage. Stage Duration Grouped by Recruiting Manager: ▶ Results are grouped by recruiting manager and sorted by sequence of the stages, followed by decreasing average number of days in the stage. Stage Duration Grouped by Recruiter: ▶ Results are grouped by recruiter and sorted by sequence of the stages, followed by decreasing average number of days in the stage. Stage Duration Grouped by Hiring Manager: ▶ Results are grouped by hiring manager and sorted by sequence of the stages, followed by decreasing average number of days in the stage.	
Time to Fill	Provides time-to-fill and time-to-hire metrics for all jobs where a candidate entered the hired stage with a user-defined hired date range (if provided).	Hired Date Job Company Location Job Department Job Recruiter Job Hiring Manager Job Recruiting Manager Job Business Unit Evergreen Job

Report	Description	Filters
Unposted Requisitions	Provides information about all currently unposted requisitions that are either in the approval process or waiting to be posted.	Requisition Department Requisition Company Location Requisition Requester Requisition Requested Date
User Accounts	Provides information about all user accounts.	User Active User Role User Created Date
User Locations Report	Provides a list of all active and inactive user accounts and shows the locations associated to those user accounts.	
XML Integration Results	Provides a list of the posts/files received by integration.	Transferred Date

Run a standard report

1. From the navigation bar, click **Reporting & Analytics>Standard Reports**.

The Standard Reports page opens and shows all the reports you have permissions to view.

Tip: You'll see all the reports along with a brief description. You can use the search function to find the report you want. The search function looks for report title and keywords in the report description.

2. Scroll or search for the report you want.
3. Click **Run Report** to open the report.
4. (If applicable) Select filters to limit the report.
5. Click  to update/reload report results.

The report results appear in the data grid.

You can perform the following report management tasks (based on your **tier** (see "**Tiers**" on page 15) access):

Task	Description
Reset filters	Change any of the filters to get a different take on the report. From the dashboard menu, click  to update/reload report results.
Download data	Download report data into a format you select. From the dashboard menu, click  and select Download .
Resize columns	Click a column header and expand or contract to make it the size you want.
Sort columns	Click a column header to toggle between ascending and descending order.
Autosize columns	To autosize columns, from the tile menu, click  and select Autosize all columns .
Reset all column widths	If you resized columns, reset sets them back to their original sizes. From the tile menu, click  and select Reset all column widths .
View expanded	View the report in a pop-up with expanded columns. From the tile menu, click  and select View>Expanded .
Explore from here	Opens Explore (on page 41) so you can explore report data in depth. Tip: This feature is available based on the tier assigned to your user profile.
Clear cache & refresh	Clears the cache and refreshes the data.

Download a standard report

- When you download a report, it includes the data as shown in the data grid.

- From the navigation bar, click **Reporting & Analytics>Standard Reports**.

The Standard Reports page opens and shows all the reports you have permissions to view.

Tip: You'll see all the reports along with a brief description. You can use the search function to find the report you want. The search function looks for report title and keywords in the report description.

- Scroll or search for the report you want.
- Click **Run Report** to open the report.
- (If applicable) Select filters to limit the report.
- Click  to update/reload report results.
- From dashboard actions, click  and click **Download**.

The Download window opens.

- Select a download format and options:

Format	Additional options
PDF	Paper size, expand tables to show all rows, arrange dashboard tiles in a single row, and open in browser
CSV	N/A

8. Click **Download**.

The report is downloaded to your computer.

Download a standard report's tile

- When you download a report's tile, it includes the data on that tile. It does not include data from other tiles on the report
1. From the navigation bar, click **Reporting & Analytics>Standard Reports**.

The Standard Reports page opens and shows all the reports you have permissions to view.

Tip: You'll see all the reports along with a brief description. You can use the search function to find the report you want. The search function looks for report title and keywords in the report description.

2. Scroll or search for the report you want.
3. Click **Run Report** to open the report.
4. (If applicable) Select filters to limit the report.
5. Click  to update/reload report results.
6. From the tile, click  and click **Download data**.

The Download window opens.

7. Select a download format and options:

Format	Additional options
CSV	Results: With visualization options applied, As displayed in the data table
HTML	
JSON	Data values: Formatted, Unformatted
Markdown	
Microsoft Excel	Number of rows to include: Current result table, All results, Custom
TXT	
PNG	Open in Browser
	N/A

8. Click **Download**.

The report is downloaded to your computer.

Expanded Analytics

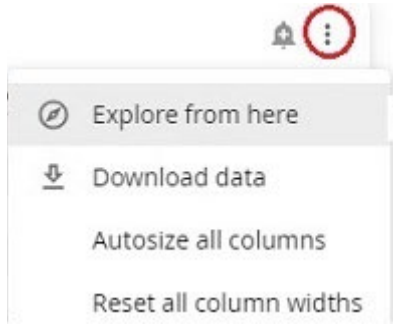
This dashboard gets you started exploring your data. You can edit, slice and dice your reporting data to understand your recruitment funnel better. You can drill down using the filters. This is where you can get really creative to make data-driven decisions. And, if you are Tier 2 or 3, you can save each one of the titles and reports and customize colors, data points, and visualizations to your own dashboards. You can then share your dashboard with other Tier 2 and 3 users.

Explore

Note: Explore is available based on your user profile's **tier** (see "**Tiers**" on page 15) assignment.

Explore lets you look at a report's data in-depth and do cool things. From within Explore, you can create a report or customize a report to meet your needs, including adding and removing data points (dimensions), rearranging columns, selecting visualizations, and more.

Explore has two "flavors" and essentially does the same thing but the intent and starting point are different.

	Starting point	Use when you want to:
Explore (dashboard)	From the navigation bar, click Reports & Analytics>Explore .	Build any report and dashboard that you want. Think of this as the new Report Builder.
Explore from here	From within any standard report (see "Standard reports (Analytics)" on page 26), click a tile's ellipsis and then click Explore from here. 	Use an existing standard report and build off of it (customize (see " Create a custom report with Explore " on page 45)).

Regardless of the starting point, Explore has the same features:

- Filters
- Data points and dimensions
- Data grid
- Visualization

Filters

Filters appear above the visualization panel. The filters default to the values you selected on the standard report. You can change them if you want.

Filters (10) Job Business Unit Name is any value Job Company Location Name and Code is any value

Visualization

Resume Source	Resume Count	Resume Hire Count
	3	0
Newspaper	26	2

Click the arrow to expand the filters panel. You can make changes to the filters here:

Filters (10) Custom Filter

Job Business Unit Name is equal to

Job Company Location Name and Code is equal to

Job Department Name and Number is equal to

Note: Changing filters here affects the report and visualization in Explore. It does not change anything on the standard report.

You can add additional filters. In the Data Points list for the filter you want to add, click .

All Fields In Use

Resume

Address

Available Date

Certifications

Consented Date

Created Date

Created Date

Created Month

Created Quarter

Created Time

Filter by field

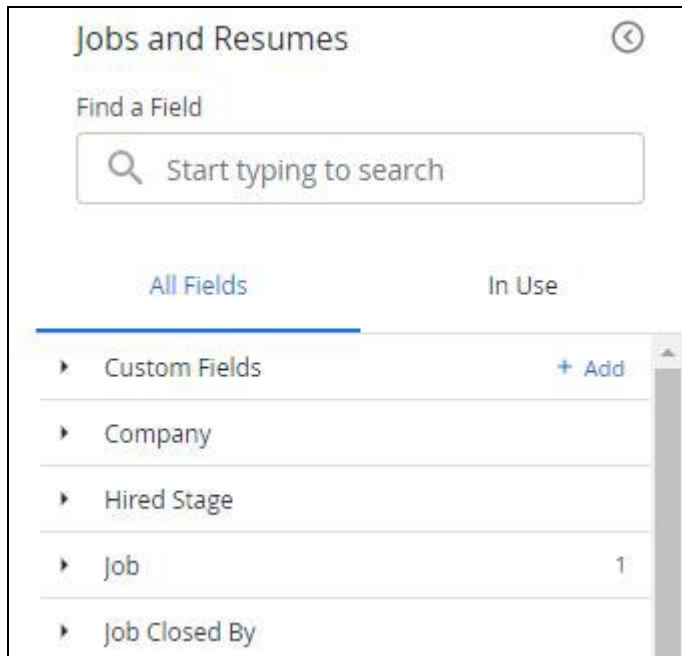
Resume Full Name (Resume ID) is equal to

Visualization

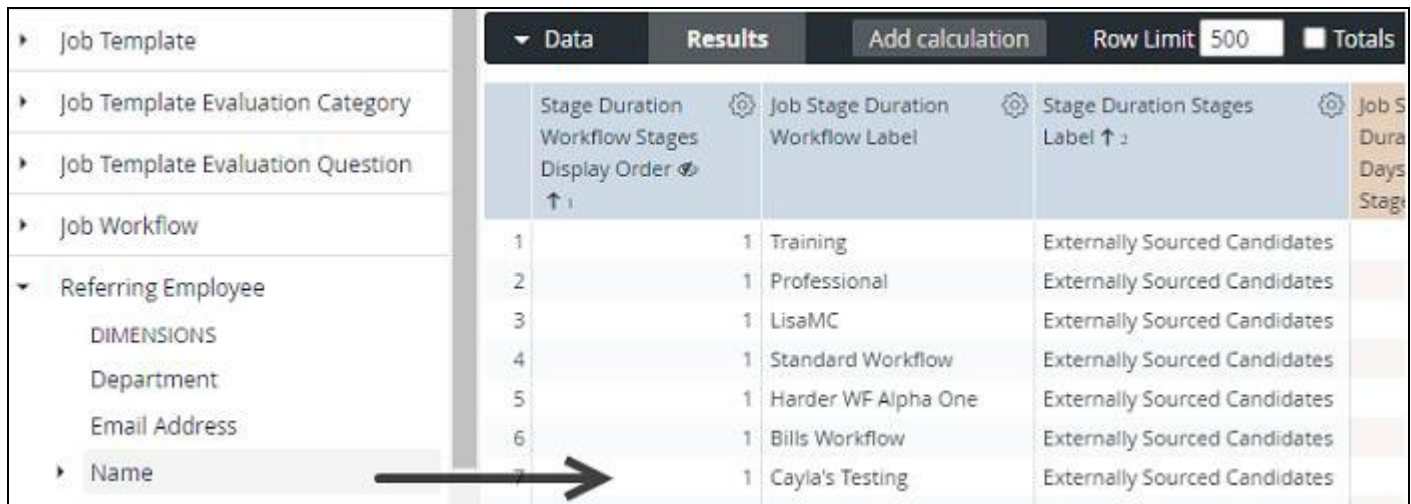
Resume Source (Employee Referrals Grouped)	Resume Count	Resume Hire Count
Advantage Professionals	68	0
Apple One	6	1
Broadbean Test Board	3	0
Campus Recruiting	15	0

Data points and dimensions

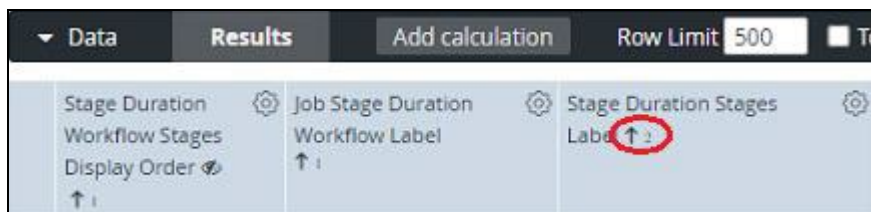
Data points appear on the left side of the page.



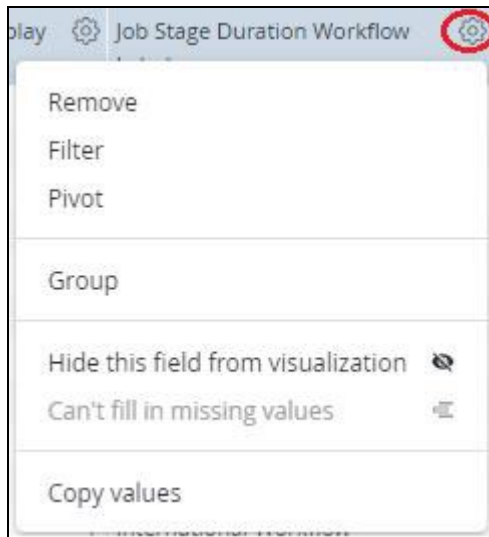
Data points have dimensions. A dimension is a set of unaggregated values that you can group data by. Click a dimension to add it to the report (data grid). By doing this, you are taking a standard report and customizing it. Add all the dimensions you want!



Remember you can sort columns. Click the arrows in the column heading to toggle from ascending to descending:



You can also do amazing things with the gear icon. Click it to see options:



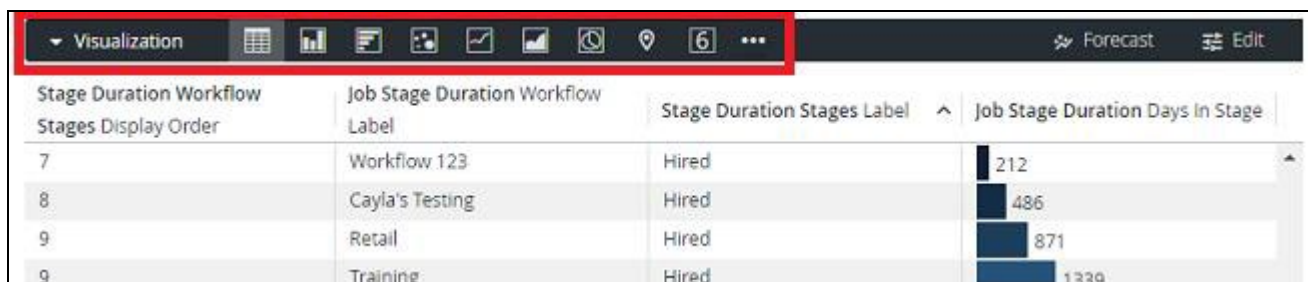
Data grid

As you might expect, the data grid contains a report's data. It's the content you are looking for when you run a report. When you use filters and add/remove data points, the data grid changes. You can do also do some unique things like add calculations, limit the number of row, and included totals and subtotals. Work with these options to get the data the way you want it.

Data		Results	Add calculation		Row Limit	500	Totals	Subtotals
Stage Duration Workflow Stages Display Order	Job Stage Duration Workflow Label	Stage Duration Stages Label	Job Stage Duration Days In Stage					
1	1 Training	Externally Sourced Candidates	442					
2	1 Professional	Externally Sourced Candidates	27					
3	1 LisaMC	Externally Sourced Candidates	151					
4	1 Standard Workflow	Externally Sourced Candidates	395					
5	1 Harder WF Alpha One	Externally Sourced Candidates	0					
6	1 Bills Workflow	Externally Sourced Candidates	243					
7	1 Cayla's Testing	Externally Sourced Candidates	8					
8	1 Workflow 123	Externally Sourced Candidates	36					

Visualizations

At the top of the page, you'll see the Visualization tile. In the menu bar, you can select various bars and graphs to present the data in different ways:



Some visualizations work better with certain reports. Click each visualization option to see what works best.

Custom reports

Using analytics, you can take a standard report and **customize** (see "**Create a custom report with Explore**" on page 45) it.

Key info

- **Explore** (on page 41) is the tool that lets you customize reports.
- Customizing may include adding and removing data points, rearranging columns, creating visualizations, and more.
- When you customize a report, the standard report that was the origin is not changed.
- After customizing, you can save the report as a **dashboard** (see "**Dashboards**" on page 51) or **Look** (see "**Looks**" on page 48).

Create a custom report with Explore

1. **Run a report** (see "**Run a standard report**" on page 38).
2. From a tile's dashboard, click  and select **Explore from here**.

Explore (on page 41) opens.

3. (If applicable) Select filters to limit the report.

Note: Changing filters in Explore does not affect the standard report. Filters here apply only to the custom report you are creating.

4. Customize the report:

Add filters and data points:

To:	Do this:
Add filters	Expand a data point category. For the data point you want to add as a filter, click  . Repeat for each filter that you want to add.
Add data points	Expand a data point category. Look for the data point you want. Click it to add it to the data grid. Repeat for each data point that you want to add.

Here are *some* of the things you can do in the data grid:

Task	Description
Remove data points	To remove a data point (column), click  and select Remove .
Filter data points	To filter a data point (column), click  and select Filter . In the Filters panel, enter values.

Task	Description
Hide data points from visualization	To hide a data point from the visualization, click  and select Hide this field from visualization .
Pivot data points	To pivot a data point, click  and select Pivot .
Copy values	To copy the column header and all column values, click and  select Copy values . You can then paste into a spreadsheet, text file, and so on.
Add a totals column	To add a column total, click Totals in the data grid bar.
Move columns	Click a column heading and drag the column to where you want it.
Sort columns	Click a column heading and when the arrows appear, click to toggle between ascending and descending order.

Here are *some* of the things you can do in the visualization:

Task	Description
Select a visualization	From the Visualization bar, click a visualization icon. Some examples are table, column, bar chart, scatterplot, line, pie chart, and more.
Change the "look" of the visualization	From the Visualization bar, click Edit . You can then change the theme, format, and more.
Forecast	From the Visualization bar, click Forecast . Forecasting lets you add data projections to new or existing Explore queries to help predict and monitor specific data points.
Manipulate columns	Click  to freeze, copy values, autosize all columns, or reset all column widths.
Sort columns	Click a column heading and when the arrows appear, click to toggle between ascending and descending order.

- From the dashboard menu, click **Run**.

The system generates your custom report.

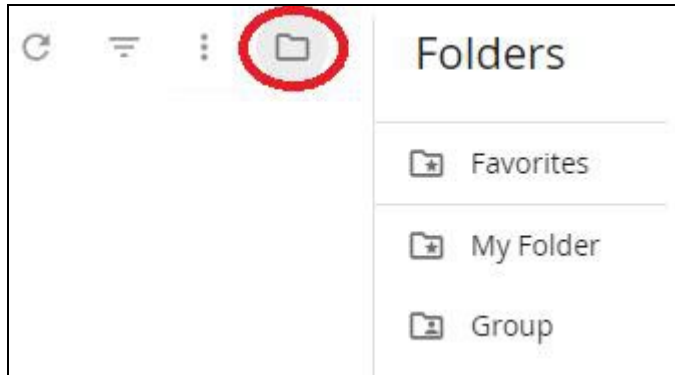
- Click , select **Save** and select an option.

Folders

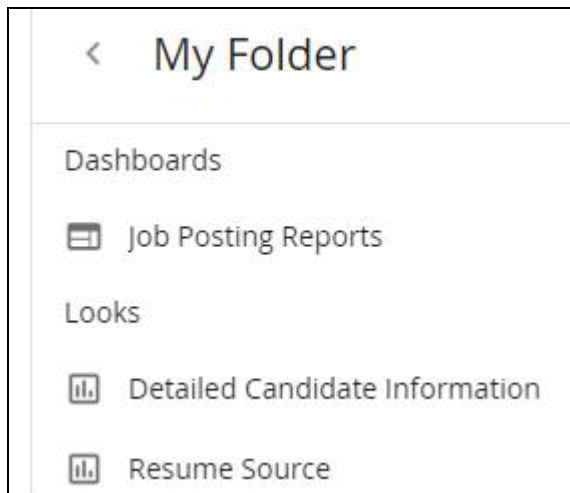
Dashboards and Looks can be grouped into folders. Folders are an way to keep things organized. There are three folder option:

- Favorites
- My Folder
- Group

On any standard report, click  to expand the folder panel:

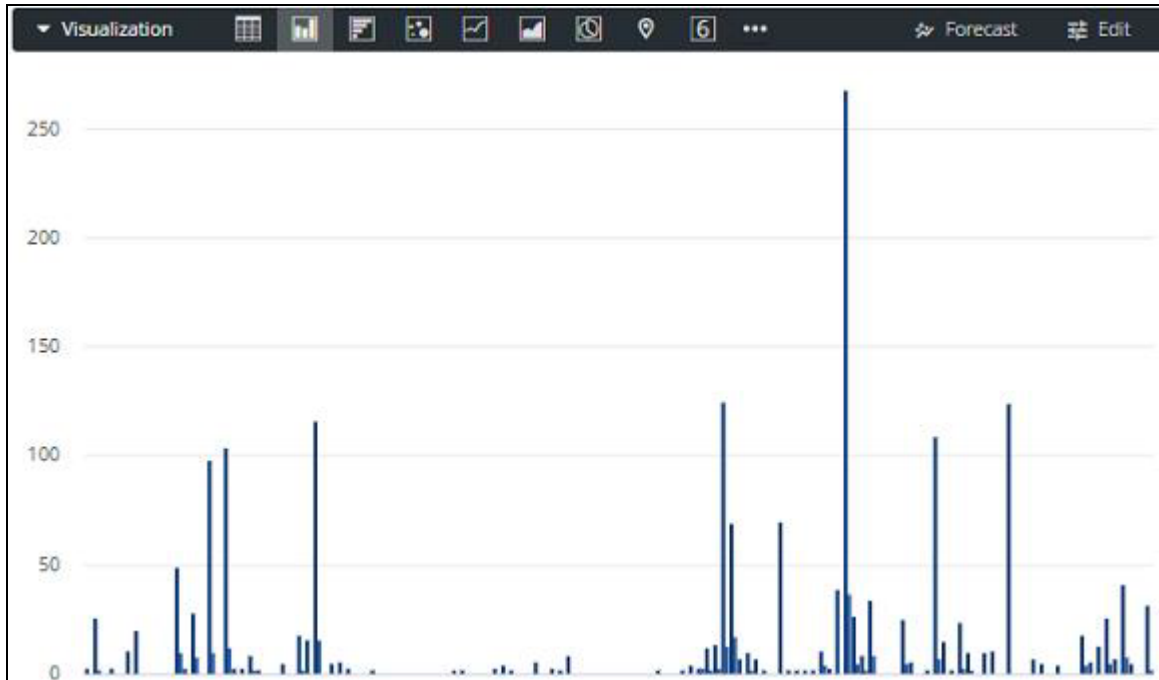


Click a folder to expand and see the contents:



Looks

A Look is a saved visualization. Looks are created with **Explore** (on page 41) and are used to analyze data. Looks can be saved to **folders** (on page 46).



Access (view) a Look

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.
3. Click the folder (**Favorites**, **My Folder**, or **Group**) that contains the Look you want to access.
4. Select the Look.

Save a report as a Look

1. **Run a report** (see "**Run a standard report**" on page 38).
2. Locate the tile you want to explore.
3. From the tile dashboard, click  and select **Explore from here**.

Explore (on page 41) opens.
4. (If applicable) Customize the report.
5. From the dashboard menu, click  and select **Save>As a Look**.
6. In the Title field, enter a name for the Look.
7. (Optional) Enter a description.
8. In the Folder drop-down, select a folder where you want to save the Look.

Note: You cannot select folders that you do not have access to.

9. Click **Save**.

The Look is saved.

Make a Look a favorite

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**My Folder** or **Group**) that contains the Look you want to make a favorite.
4. Select the Look.
5. Beside the Look title, click .

The Look is saved to the Favorites folder.

Edit a Look

- After creating a Look, you can edit its underlying query and filters, edit its name, and more.

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**Favorites**, **My Folder**, or **Group**) that contains the Look you want to edit.
4. Select the Look.
5. From the dashboard menu, click  and select **Edit Look**.
6. Make changes and click **Save**.

Download a Look

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**Favorites**, **My Folder**, or **Group**) that contains the Look you want to download.
4. Select the Look.
5. From the dashboard menu, click  and select **Download**.
6. Select a download format and options:

Format	Additional options
CSV	Results: With visualization options applied, As displayed in the data table
HTML	

Format	Additional options
JSON	Data values: Formatted, Unformatted
Markdown	Number of rows to include: Current result table, All results, Custom
Microsoft Excel	
TXT	
PNG	N/A

7. In the Filename field, enter a filename
8. Click **Download**.

The Look is downloaded to your computer.

Schedule a Look for delivery

- You can schedule a Look to be sent to recipients based on a delivery schedule.
- This is a premium feature (**tier 3** (see "**Tiers**" on page 15)).
- This topic assumes that the Look is already saved to a folder.

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder that contains the Look and then select it.
4. From the dashboard menu, click  and select **Schedule**.
5. From the Schedules window, do the following:
 - a. Give the schedule a name.
 - b. Select the where the data should go. (Email is a popular choice.)
 - c. Add recipients.

Tip: Recipients do not have to be users in the system. It can be anyone with a valid email address. To send to multiple recipients, separate email addresses using a comma.

- d. (Optional) Include a custom message.
- e. Select the data format.
- f. Select a trigger.
- g. Select a delivery schedule.
- h. (Optional) Add filters and advanced options.
- i. Click **Save All**.

Delete a Look

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**Favorites, My Folder, or Group**) that contains the Look you want to delete.
4. Select the Look.
5. From the dashboard menu, click  and select **Move to trash**.
6. On the confirmation pop-up, click **Move to trash**.

Dashboards

A dashboard organizes a collection of reports (tiles), visualizations, and looks. A dashboard can have one or more collapsible sections to organize related content. For example, you might create a dashboard of reports that you run often—or dashboards that group similar reports together.

Dashboards can be saved to **folders** (on page 46).

Access (view) a dashboard

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**Favorites, My Folder, or Group**) that contains the dashboard you want to access.
4. Select the dashboard.

Save a report to a new dashboard

1. **Run a report** (see "**Run a standard report**" on page 38).
2. Locate the tile you want to explore.
3. From the tile dashboard, click  and select **Explore from here**.

Explore (on page 41) opens.

4. (If applicable) Customize the report.
5. From the dashboard menu, click  and select **Save>As a new dashboard**.
6. In the Title field, enter a name for the dashboard.
7. Click **Save**.

The report is saved to the dashboard as a tile.

Save a report to an existing dashboard

1. **Run a report** (see "**Run a standard report**" on page 38).
2. Locate the tile you want to explore.
3. From the tile dashboard, click  and select **Explore from here**.

Explore (on page 41) opens.

4. (If applicable) Customize the report.
5. From the dashboard menu, click  and select **Save>To an existing dashboard**.

The Add to a Dashboard page opens.

6. In the Title field, enter a name for this report (tile).
7. Select a folder: **My Folder** or **Group Folder**.
8. From the dashboard list, select a dashboard and click **Save to Dashboard**.

The report is saved to the dashboard as a tile.

Make a dashboard a favorite

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**My Folder** or **Group**) that contains the dashboard you want to make a favorite.
4. Select the dashboard.
5. Beside the dashboard title, click .

The dashboard is saved to the Favorites folder.

Edit a dashboard

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**Favorites**, **My Folder**, or **Group**) that contains the dashboard you want to edit.
4. Select the dashboard.
5. From the dashboard menu, click  and select **Edit dashboard**.
6. Make changes and click **Save**.

Download a dashboard

1. From the navigation bar, click **Reports & Analytics>Explore**.
2. From the dashboard menu, click .

The Folders panel expands.

3. Click the folder (**Favorites**, **My Folder**, or **Group**) that contains the dashboard you want to download.
4. Select the dashboard.
5. From the dashboard menu, click  and select **Download**.
6. Select a download format and options:

Format	Additional options
PDF	Paper size, expand tables to show all rows, arrange dashboard tiles in a single row, and open in browser
CSV	N/A

- Click **Download**.

The dashboard is downloaded to your computer.

Schedule a dashboard for delivery

- You can schedule a dashboard to be sent to recipients based on a delivery schedule.
- This is a premium feature (**tier 3** (see "**Tiers**" on page 15)).
- This topic assumes that the dashboard is already saved to a folder.

- From the navigation bar, click **Reports & Analytics>Explore**.

- From the dashboard menu, click .

The Folders panel expands.

- Click the folder that contains the dashboard and then select it.
- From the dashboard menu, click  and select **Schedule delivery**.
- From the Schedules window, do the following:
 - Give the schedule a name.
 - Select a delivery schedule.
 - Select the where the data should go. (Email is a popular choice.)
 - Add recipients.

Tip: Recipients do not have to be users in the system. It can be anyone with a valid email address. To send to multiple recipients, separate email addresses using a comma.

- Select the data format.
- (Optional) Add filters and advanced options.
- Click **Save**.

Delete a dashboard

- From the navigation bar, click **Reports & Analytics>Explore**.

- From the dashboard menu, click .

The Folders panel expands.

- Click the folder (**Favorites**, **My Folder**, or **Group**) that contains the dashboard you want to delete.
- Select the dashboard.
- From the dashboard menu, click  and select **Move to trash**.

6. On the confirmation pop-up, click **Move to trash**.

Task List

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Review and reject a requisition on your Task List	57

Task List

The Task List shows requisitions and offers that need your review and approval. It also shows resumes that need your review.

Key info

- Requisitions, offers, and resumes that need review/approval are shown as cards.
- Each card has a link so you can view that requisition, offer, or resume.
- Offer and requisition approval cards have Reject and Approve buttons so you can easily approve or reject.
- You can filter your Task List by job title, requisition title, candidate name, or requester name.

Good to know

- You access your Task List by clicking  in the header. The bubble shows the number of items that need your review. If there is no bubble, you have nothing to review and your Task List is empty.
- You can access your Task List if you have a role of recruiting manager, recruiter, or hiring manager.
- If you are a user with a role other than recruiting manager, recruiter, or hiring manager, you will only see the new Task List icon if your administrator has assigned the Offer Approvers and/or Requisition Approvers permission to your user account.
- If you access the Task List from an approval email, the card that requires approval is highlighted with a green border.

Perform a resume review on your Task List

1. From the header, click .

The **Task List** (page 55) opens.

2. (Optional) Enter a keyword to filter (narrow) the Task List.
3. On a resume card, click the **View Resume** link.

The resume opens.

4. Scroll through the resume and review it.
5. Click **Close**.
6. When you are ready to complete the review, click **Complete Review**.

The Complete Review window opens.

7. Select an evaluation.
8. (Optional) Enter a comment.
9. Click **Confirm**.

The system sends an email to the review requester to let them know you completed the review. The email contains your evaluation and comments. Your review is also saved to the candidate's profile (History tab).

Review and approve an offer on your Task List

1. From the header, click  .

The **Task List** (page 55) opens.

2. (Optional) Enter a keyword to filter (narrow) the Task List.
3. On an offer card, click the **View Offer** link.

The offer opens.

4. Scroll through the offer and review it.
5. Click **Close**.
6. If everything is correct on the offer, click **Approve**.

The Approve Offer window opens.

7. (Optional) Enter comments.
8. Click **Confirm**.

Review and reject an offer on your Task List

1. From the header, click  .

The **Task List** (page 55) opens.

2. (Optional) Enter a keyword to filter (narrow) the Task List.
3. On an offer card, click the **View Offer** link.

The offer opens.

4. Scroll through the offer and review it.
5. Click **Close**.
6. Click **Reject**.

The Reject Offer window opens.

7. Enter comments explaining the reason for the rejection.
8. Click **Confirm**.

Review and approve a requisition on your Task List

1. From the header, click  .
The **Task List** (page 55) opens.
2. (Optional) Enter a keyword to filter (narrow) the Task List.
3. On a requisition card, click the **View requisition details** link.
The requisition opens.
4. Scroll through the requisition and review it.
5. Click **Close**.
6. If everything is correct on the requisition, click **Approve**.
The Approve Requisition window opens.
7. (Optional) Enter comments.
8. Click **Confirm**.

Review and reject a requisition on your Task List

1. From the header, click  .
The **Task List** (page 55) opens.
2. (Optional) Enter a keyword to filter (narrow) the Task List.
3. On a requisition card, click the **View requisition details** link.
The requisition opens.
4. Scroll through the requisition and review it.
5. Click **Close**.
6. Click **Reject**.
The Reject Requisition window opens.
7. Enter comments explaining the reason for the rejection.
8. Click **Confirm**.

Generative AI job description

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Generative AI job description

Coming up with a job description for a job posting or requisition can be time consuming. Using Generative Artificial Intelligence (AI), you can let AI do the hard work. AI can generate key pieces of the job template or requisition—job description, required skills, and required experience—in seconds.

Key info

- Your system administrator **turns on** (see "**Enable (turn on) the Generative AI job description feature**" on page 58) the feature and **selects the content** (see "**Select content for the Generative AI job description**" on page 58) that AI uses in its algorithm to generate content.
- Generative AI content is available when you **create** (see "**Create a Generative AI job template**" on page 59)/**edit** (see "**Edit a Generative AI job template**" on page 60) a job template or **create** (see "**Create a requisition**" on page 169)/**edit** (see "**Edit a requisition**" on page 172) a requisition.
- If the AI-generated content isn't exactly as you want it, you can edit it or regenerate with AI.

Good to know

- After your system administrator turns on the AI generated job description feature, it is available to any user who has access to job templates.

Enable (turn on) the Generative AI job description feature

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Generative AI Job Description** link.

The Generative AI Job Description page opens.

3. Set the **Enable Generative AI Job Description** option to **Yes**.

4. Click **Save**.

The *Generate Job Description with AI* button is now available on the Job Template page.

Select content for the Generative AI job description

- AI uses the content (fields) that you select in its algorithm to generate the Job Description, Required Skills, and Required Experience fields on a job description.
- AI also uses the text (keywords) in the Company Values text box as part of its generative algorithm.

1. From the navigation bar, click **Administration>Settings**.

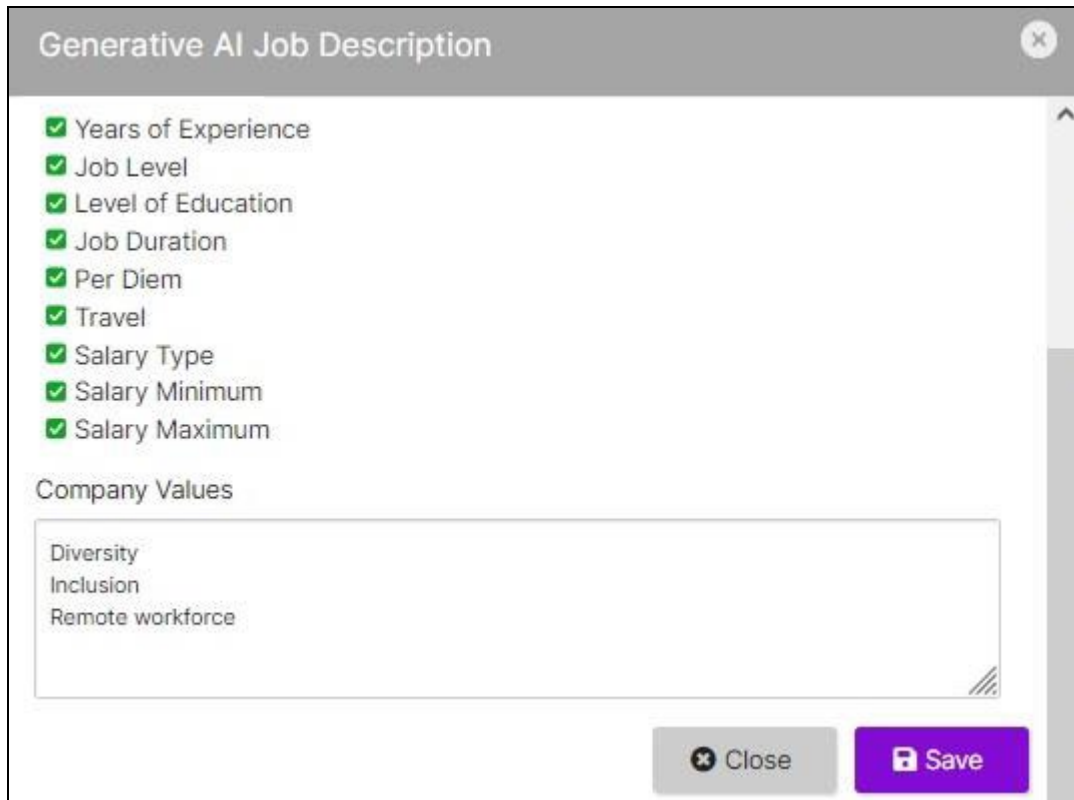
The Settings page opens.

2. Click the **Generative AI Job Description** link.

The Generative AI Job Description page opens.

3. Select (check) all the fields to be used in the AI generative algorithm.
4. (Optional) In the Company Values field, enter keywords that describe your company brand, culture, goals, and so on. AI uses what is entered here as part of the AI generative algorithm.

Example: Let's say your company values diversity and inclusion and has a remote workforce. The Company Values field would look similar to this:



Generative AI Job Description

- ☒ Years of Experience
- ☒ Job Level
- ☒ Level of Education
- ☒ Job Duration
- ☒ Per Diem
- ☒ Travel
- ☒ Salary Type
- ☒ Salary Minimum
- ☒ Salary Maximum

Company Values

Diversity
Inclusion
Remote workforce

Close Save

5. Click **Save**.

Create a Generative AI job template

- After an **AI generated job description** (see "**Generative AI job description**" on page 58) is created, it can be used to **create a job posting** (on page 74).

1. From the navigation bar, click **Administration>Job Templates**.

The Job Templates page opens.

2. Click **Create**.

The Job Template page opens.

3. Go through the fields on the page and complete them.

4. Click **Generate Job Description with AI**.

Job Description, Required Skills, and Required Experience fields are AI-generated.

Here's an example:

Job Description

As an Instruction Designer, you will be responsible for designing and developing instructional materials for various training programs. You will collaborate with subject matter experts to gather information and create engaging and effective learning experiences. Your role will involve analyzing training needs, designing curriculum, and creating instructional materials such as e-learning modules, videos, and job aids. You will also evaluate the effectiveness of training programs and make necessary revisions to improve learning outcomes. The Instruction Designer will play a crucial role in ensuring that employees have the knowledge and skills required to excel in their roles.

Required Skills

- Proven experience in instructional design and development.
- Strong knowledge of instructional design principles and adult learning theories.
- Proficiency in using instructional design software and e-learning authoring tools.
- Excellent written and verbal communication skills.
- Ability to collaborate effectively with subject

5. Review the AI-generated fields and make changes if you want.

6. Click **Save**.

The AI generated job template can now be selected when creating a job posting.

Edit a Generative AI job template

- This topic shows you how to let AI modify the Generative AI fields on a job template.

1. From the navigation bar, click **Administration>Job Templates**.

The Job Templates page opens.

2. In the list, click a template name.

The Job Template page opens.

3. Scroll down to the Job Description field.

4. Click **Modify with AI**.

5. The Modify Job Description page opens.

It has two panels. The left panel (Original Description) shows the current AI-generated content for Job Description, Required Skills, and Required Experience. The right panel (AI Description) is blank.

6. Click **Generate**.

The right panel (AI Description) shows the AI generated modifications.

7. If you:

- Want to accept the AI-generated modifications, click **Use AI Description**. The changes are applied.
- Do not want to accept the AI-generated modifications, click **Keep Original Description**. No changes are applied.

8. (If applicable) Make any other changes to the job template.

9. Click **Save**.

Job postings

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Searching for job postings

Job search

Searching for jobs in Rival Recruit is a task you do often. Rival Recruit has flexible search options to make searching easy.

Search option	Description
Quick search	Quick search is a fast way to find a job. In the header at the top of a page, toggle the quick search bar to Jobs . Then type a job title or tracking code and press Enter .
Advanced search	Use filters to find what you are looking for.
Basic search	Basic searches are default system searches. There are three: ▶ Jobs: Includes jobs with Status (All, open and closed jobs), Posting status (All), Sort By (descending order, most recent date at top) ▶ My Jobs: Includes jobs assigned to you (logged in user) with Status (All, Open, Closed), Posting status (All), Sort By (descending order, most recent date at top) ▶ My Filled Jobs: Includes jobs assigned to you (logged in user), Filled (Yes), Current Stage (Hired), Status (All, open and closed jobs), posting status (All), Sort By (descending order, most recent date at top)
My searches	My searches are searches that you created and saved and are available from the Jobs page. My searches appear after you have saved at least one set of results.
Recent searches	Recent searches are your last 10 most recent searches—excluding basic and your saved My search searches. Recent searches are available from the Jobs page.
Most recent search	The most recent search you ran.

Filters

 **Hide Filters**

Job Title or Code

Hiring Workflow

Job Status

Open

Filled

All

Posting Status

Posted Date

m/d/yyyy

m/d/yyyy

Primary Location

Job Created Date

m/d/yyyy

m/d/yyyy

Additional Locations
Original Posting Date

Search filters help you narrow the scope of a job search. By using filters, you get a subset of jobs (the subset you really want) rather than all jobs.

Search result columns

☐	Internal Job Title ↕	Tracking Code ↕	Resumes	My Review Requests	Location	Posting Status ↕
☐	Account Executive	172218-015	1	0 / 0	Chicago	Normal - Int./ Ext. Applicants
☐	Case Manager - Registered Nurse	172204-015	1	0 / 0	Remote (U.S. Country Wide)	Normal - Int./ Ext. Applicants
☐	Applications Developer Lead	172203-015	0	0 / 0	Detroit, MI	Normal - Int./ Ext. Applicants

Search results appear in a data grid. Some columns are included by default, but you can add additional columns to meet your needs.

Columns with up and down arrows are sortable. A column with one arrow means that column is sorted.

Search for a job (quick search)

- From the header, toggle the search box to **Jobs**.
- Enter a job title or tracking code and press **Enter**.

The Jobs page opens and displays search results.

Search for a job

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

Save a job search to use later

- You can save a job search to use later.
- After saving it, you can select it from the My Searches list.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

5. Click  and then click **Save Search As**.
6. Enter a name.
7. (Optional) Make this search the default.
8. (Optional) Make this search the quick search default.
9. (Optional) Make this search the job count default.
10. Click **Save**.

Export job search results to a Microsoft Excel file

- If you have the Export Job Search Results permission, you can export job search results.
- If search results have more than 500 results, only a maximum of 500 results are exported.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

Tip: Only the columns shown on the page are eligible to be exported. If you want additional or different columns exported, add them before exporting.

5. Click  and then click **Export Search Results**.
6. On the confirmation pop-up, click **Download**.
7. On the Save File pop-up, open the file in Microsoft Excel or save the file to your computer.

Search for a job using a saved search

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click  and then click **My Searches**.
3. Click the search you want.

Results are listed in the data grid.

Make a saved job search the default quick search

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click **Quick Search Default**.
4. Click **Save**.

Make a saved job search the default search

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click **Default**.
4. Click **Save**.

Make a saved job search the default job count search

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click **Job Count Default**.
4. Click **Save**.

Delete a saved job search

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click the **Delete** check box.

4. Click **Save**.

Select columns for job search results

- You can select (add) columns to customize search results to meet your needs.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click .
3. In the Available Columns list, click columns to move them to Selected Columns.

Tip: To change the order of selected columns, drag and drop them into the order you want.

4. Click **Apply**.

Remove columns from job search results

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click .
3. In the Selected Columns list, click **X** for the column you want to remove,

Tip: To change the order of selected columns, drag and drop them into the order you want.

4. Click **Apply**.

Working with job postings

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Job postings overview

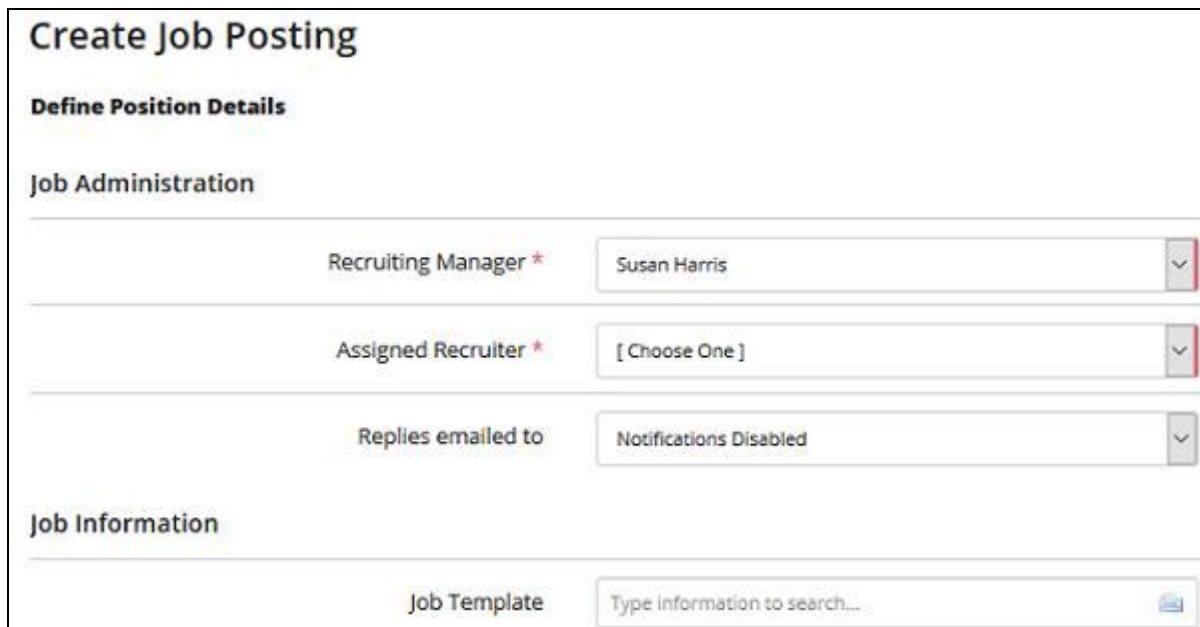
Recruiters and recruiting managers can create and manage job postings, manage requisitions, view job offers, and track jobs in Rival Recruit.

Third-party job board posting methods are also available if you integrate with Broadbean or JobTarget.

Creating job postings

Depending on your internal processes, your company may begin a new position as a requisition or job. If your company is not using Rival Recruit to track the approval process of a position, then your first step is to create a job posting.

Create Job Posting page



Use this page to create a job posting. You provide details about the position here.

Job Administration

Recruiting Manager

Select a recruiting manager. This manager has overall responsibility for the job. This field is not displayed to applicants.

Assigned Recruiter

Select a recruiter. This is the job owner directly responsible for finding candidates to fill the job. The recruiter receives the resume responses for the position. This field is not displayed to applicants.

Replies emailed to

Select an email address. This address is used to send automatic alerts when a candidate submits a resume to an external job posting.

You can also select an Alternate Email on the pop-up window.

Job Information**Job Template**

Job templates are pre-defined job data sets. Selecting a template will populate the job form with the data from the job template. Templates are created and administered by Recruiting Managers and/or Administrators.

Hiring Workflow

Select a hiring workflow. The workflow contains the specific hiring stages relevant to the hiring process/position.

Tip: When a job or requisition is tied to a template, the template hiring workflow takes precedence.

Evergreen Job

Select whether this is an **evergreen job** (see "**Evergreen jobs**" on page 83). (Default value is No.)

Internal Job Title

The title of the job that is displayed to Rival Recruit users.

Posted Job Title

The title of the job that is displayed to applicants. If this field is left blank, the Internal Job Title is displayed to applicants.

Tracking Code

This field is your requisition number or Job ID value. If you do not enter a tracking code, the system generates one when the requisition becomes a job posting.

Note: The system does not generate a tracking code in a sequential sequence. For example, if you enter a tracking code of "1," the next job you enter will not automatically be assigned a tracking code of "2." If your organization is interested in having sequential tracking code values generated automatically by the system, contact Rival Customer Care Center.

Number of Positions

The number of positions associated with this job posting.

Expected Start Date

Select a start date for the job. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Require eForm Submission

Choose to require eForm submission.

Tip: You only see this field if your account is configured for eForms.

Posting Status

Indicates whether the job is actively being recruited for and controls which company applicant interfaces the job will be posted to.

Posting Status does not control posting or removal from third-party internet job boards—except Limited status.

Here are the statuses:

On Hold: Job is not currently being recruited for. It is not posted to any public or internal job posting sites. The time-to-fill days continue counting when a job is put on-hold.

Normal Int./Ext. Applicants: Job is for internal and external candidate submissions and appears on both the internal and external job sites. Job also is available to fee agencies if any are selected on the Department Information page.

Internal: Only internal candidate submissions are accepted for the position. If Rival Recruit is hosting your company's internal/intranet applicant interface, the job appears on that interface only.

External: Only external candidate submissions are accepted for the position. If Rival Recruit is hosting your company's public/external applicant interface, the job appears on that interface only. The job is also available to fee agencies if any are selected on the Department Information page.

Executive: Job is not displayed to the public but other methods are used to recruit for the job. This status allows you to display the job to fee agencies on the public/external applicant interface without allowing either internal or public applicants to view the job.

Waiting Approval: Job is not yet approved and it is not posted to any public or internal job site.

Limited: Job does not appear on any career sites and is not sent in the nightly feed to job boards. Candidates are made aware of a limited job posting by receiving a link to the posting.

Status Change Rules

(Available if **turned on** (see "**Turn on automatic job posting status change rules**" on page 222))
Rival Recruit can now automatically change a job's posting status based on rules that you create here.

Add a rule (see "**Add a rule to automatically change job posting status**" on page 74).

Position Type

Select the type of position (ex. - Full Time/Regular, Part-Time). This value is displayed to applicants.

Job Level

Select the level for the job (ex. Internship, Entry Level, Mid-Career, Executive). This field is used to route the job when posting to third-party internet job boards.

Job Duration

The expected length of the assignment. This field is only used when posting to some third-party job boards. It is not posted to the Rival Recruit-hosted internal and external job listings sites.

Location Details

Job Location Code

Select a Job Location Code. A location code will populate the City, State, Zip and Country fields. (These location codes are administered by your administrator). As you type, a list of available values are shown. If the Job Location Code values do not appear in your Rival Recruit instance, it is because your administrator did not configure any locations.

Tip: If **remote job location** (on page 79) is turned on and your administrator created remote job locations, those remote job locations will be available from the drop-down.

Country

The country the job posting is based in.

Address Line 1

The street address of this location.

Address Line 2

Additional address information like apartment number, unit number, or suite.

City

City the job posting is based in. If this is a regional position, input the closest metropolitan area or your company's home base. You can indicate in the job description that the position is regional.

State

State the job posting is based in. If this is a regional position, input your company's home base and indicate, in the job description, that the position is regional.

Zip/Postal Code

Postal code the job posting is based in. If this is a regional position, input your company's home base zip code and indicate, in the job description, that the position is regional.

Note: Because US EEO and compliance laws do not apply internationally, if the country selected is anything other than United States on the job profile, the compliance section does not appear on the job posting.

Additional Locations

Use this field when posting a job that is hiring for multiple locations. You can assign up to 10 additional locations for the job posting. As you type, a list of available locations are shown. Available locations come from the location codes your administrator set up. Your company locations must include city and state to make the location an available option in this field. If **remote job location** (on page 79) is turned on and your administrator created remote job locations, they are selectable here.

Note: If the Additional Locations field is added to the Job Details page in Candidate Experience, the additional locations appear on the job posting on your Candidate Experience career site.

Compliance

Enable TaxBreak

Select Yes or No.

Position Requirements

Travel

Select the amount of travel required to perform the job. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Per Diem Included?

Select whether the position offers a per diem allowance. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Salary Minimum

The minimum offered salary for the job.

Salary Maximum

The maximum offered salary for the job.

Salary Type

Select a salary type. This is the frequency in which the job salary is paid.

Salary Currency

Select the international currency in which the job salary is paid.

Level of Education

Select the minimum acceptable level of education. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Years of Experience

Enter the number of years of experience required to perform the job. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Description/Skills

Note: Fields in this section support the use of the HTML editor. The HTML editor processes the content and applies the HTML tags so that the content displays on web pages as expected. Copying and pasting previously formatted content out of word processing programs such as Microsoft Word directly into the Rival Recruit HTML Editor is *not* recommended and will often yield unexpected results.

Job Description

The description of the job. There is no character limit on this field. This field accepts HTML tags for advanced text formatting.

**Required Skills**

The required skills for the job. There is no character limit on this field. This field accepts HTML tags for advanced text formatting. (Applicants cannot see this field.)

Required Experience

The required experience for this position. There is no character limit on this field. This field accepts HTML tags for advanced text formatting. (Applicants cannot see this field.)

Internal Fields**Internal Notes**

Enter any notes about the job posting. Only Rival Recruit users can view the internal notes. Applicants cannot view this field.

Internal Skills

Enter any notes about the skills required to perform the duties of the job posting. Only Rival Recruit users can view the internal skills. Applicants cannot view this field.

Notes on Position

Enter any notes about this position. (Applicants cannot see this field.)

Custom Fields

Depending on your company's specific configuration, there may be custom fields at the bottom of the form. If there are, complete them.

Department & Budget Details**Business Unit**

Select the business unit the job posting should be associated with. Business unit can be displayed on the job listings page for internal and external applicants.

Department

Select the department the job posting should be associated with. Department can be displayed on the job listings for internal applicants.

Hiring Manager

Select the hiring manager that requisitioned the job posting. The name of the hiring manager can be displayed on the job listings for internal applicants. Selecting a hiring manager here does not grant access for them to view the candidates for the job posting.

Industry

Select the most appropriate industry for your company. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Business Function

Select the most appropriate business function for the job posting. The business function should correspond to the type of work that the position involves. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Budgeted Salary

Enter the budgeted salary for the job posting. This field accepts numeric characters only. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Budget Currency

Select the international currency in which the job salary is paid.

Budgeted Quarter

Select the budgeted quarter for the job posting. This field accepts numeric characters only. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Budgeted Year

Select the budgeted year for the job posting.

Fee Agency

If you want a fee agency to be able to submit resumes for the job posting, choose one from the list.

Multiple agencies can be selected using the CTRL key. Rival Recruit administrators or recruiting managers define the agencies that appear in this list.

Note: Selecting a fee agency does not inform the agency that there is an opening waiting for resume submission. Fee agency selection provides access to submit resumes for the job posting from the Rival Recruit-hosted external website. Your company must set up a login for the fee agency and provided their login information.

Priority Settings

Determine the priority parameters for the position on the Job Priority page. These status indicators appear next to each job on the Job Tracking pages.

Time Measurement

The overall time frame measurement can be defined in terms of **days**, **weeks** or **months** using the drop-down menu.

Set time frame

Set the High priority field for the number of days it will take a position to become high priority. These jobs will have a red indicator.

Set the Low priority field for the number of days a job will be low priority. These jobs will have a green indicator.

Positions that fall between the two parameters have a Normal status and will have a yellow indicator.

Job Category

Click a job category. A job can only be assigned to one job category.

The job category determines how an applicant on the Rival Recruit-hosted job listings page(s) can browse for a job. For example, if you choose to associate the job to the Accounting and Finance job category, an applicant views this job by filtering to show jobs from All Categories or the Accounting and Finance category.

Note: Job categories are set up during the Rival Recruit implementation process and are maintained by your administrator.

Create a job posting

1. From the navigation bar, click **Jobs>Create Job Posting**.

The **Create Job Posting page** (page 67) opens.

2. Define position details.

Tip: All required fields are marked in red.

3. (Optional) **Add a rule to automatically change job posting status** (on page 74).
4. Click **Continue**.
5. Define department and budget details and fee agency and click **Continue**.
6. Define priority settings and click **Continue**.
7. Select a job category and click **Continue**.
8. (Optional) **Add** (see "**Add an attachment to a job posting**" on page 76) attachments and click **Continue**.
9. **Select** (see "**Select evaluation questions**" on page 77) evaluation questions.
10. Click **Finish and Return**.

The job posting is created. It appears on the Open Jobs page.

Add a rule to automatically change job posting status

- If **enabled** (see "**Turn on automatic job posting status change rules**" on page 222), Rival Recruit can now automatically change a job's posting status based on rules that you create.
 - After you create a rule and save the job posting, the rule takes effect after midnight of the day that was selected for the rule once the system has processed all status changes for that day.
 - Twenty four hours before a job posting's status is set to change, an email notification is sent to the recruiter, recruiter manager, and hiring manager associated with the job. A confirmation email is also sent to those same users once the rule is enforced.
 - You can only edit or delete a rule if that rule has not been enforced yet.
1. While **creating a job posting** (see "**Create a job posting**" on page 74) or **creating a requisition** (see "**Create a requisition**" on page 169), scroll to Status Change Rules field in the Job Information section (job posting) or Requisition Information section (requisition).
 2. Click **Add a rule**.
 3. From the Change the status to drop-down, select a posting status.
 4. From the On date field, select the date for the status change to occur.
 5. Repeat steps 2 through 4 for each rule you want to add.

Tip: Create the rule in chronological (date) order.

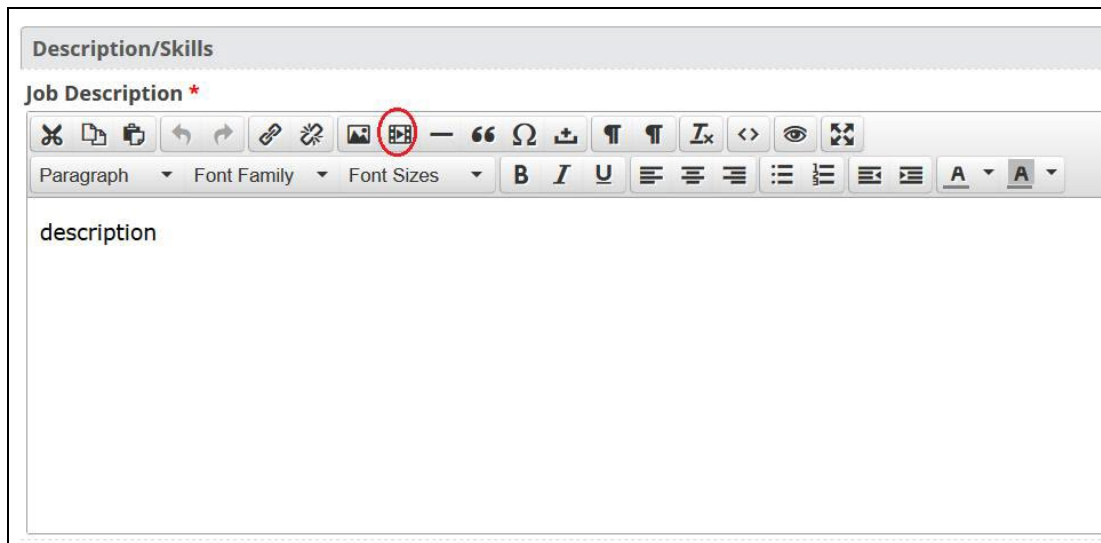
Example: Let's say that you set the Posting Status to Hold on September 12. You want that status to change to Internal on September 14 and then to External on September 21. Here's what you would do. Click **Add a rule**. From the Change the status drop-down, select **Internal** and for the On date, select

September 14. Click **Add a rule**. From the Change the status drop-down, select **External** and for the On date, select **September 21**.

Embedding videos in job postings

When creating (or editing) a job, you can embed a video. Videos can be those stored on YouTube, Vimeo, or any other popular video sharing sites.

The embed video option is available on any field with the Rich Text Editor toolbar. Best practice is to embed in Job Description:



Note: Some browsers do not support embedding videos in Email Templates. When previewing a template or sending an email containing an embedded video, some browsers may display an error. Sent emails may still be delivered to the intended recipient, and recipient may be able to successfully view email and embedded video. However, Rival cannot guarantee this as settings are handled by browsers.

Embed a video in a job posting

1. While create or editing a job posting, from the Rich Text Editor toolbar in the Job Description box, click .

The Insert/Edit Video pop-up window opens.

2. In the Source field, paste the video code (which you copied from your video sharing site).
3. (Optional) In the Alternative source field, specify the URL of an alternative video file the browser can choose. The browser uses the first recognized format. If you are using a YouTube or Vimeo link, disregard the alternative source. It's not needed.
4. (Optional) In the Poster field, specify a single static image (still frame) to represent the video as a thumbnail. Must be a URL.
5. (Optional) Change the dimensions.
6. Click **OK**.

The video displays as a gray placeholder box within the Rich Text field.

After you finish creating or editing this job posting, you can view the video on the Job Posting Details page.

Add an attachment to a job posting

- Adding attachments is an optional feature. If you want this feature, request that a Rival support specialist enable it.
- Once enabled, recruiting managers, administrators, and recruiters can add attachments to job postings they are creating.
- Some typical attachment examples: job posting legal information, detailed version of job description, organizational chart, history of the job, and so on.
- Candidates cannot access or view attachments.

Add an attachment while creating a job posting

1. From the navigation bar, click **Jobs>Create Job Posting**.

The **Create Job Posting page** (page 67) opens.

2. Complete the first four pages of the job posting.
3. On the fifth page (Add Attachments page), click **Upload Files**.

The Upload Attachments window opens.

4. From the Upload Attachment window, click **Browse** to select a file to upload.
5. In the Description text box, type a description of the file.
6. Click **Upload File**.

The file is now attached to the job posting.

Tip: To upload additional attachments, click **Upload Files** and repeat steps 4 through 6.

Add an attachment to an existing job posting

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job title.

The Job Posting Details page opens.

4. Click  and click **Edit This Job**.

The Edit Job Posting - Position Details page opens.

5. Click  and click **Edit Job Posting - Attachments**.
6. Click **Upload Files**.

The Upload Attachments window opens.

7. From the Upload Attachment window, click **Browse** to select a file to upload.

8. In the Description text box, type a description of the file.
9. Click **Upload File**.

The file is now attached to the job posting.

Tip: To upload additional attachments, click **Upload Files** and repeat steps 7 through 9.

Select evaluation questions

- During the creation process, you can choose evaluation questions to associate with a job posting. You can also edit associated questions after a job is created by editing the job posting.
 - Your Rival Recruit administrator creates and maintains the evaluation questions you can select.
1. From the Evaluation Questions page, click the name of a Question Category to see the list of questions associated with the category.
 2. Select the section in which the questions should be presented and responses collected.
 3. For each question, use the check boxes at the bottom of the question details to configure which interface(s) the question will be used on. If no sections are chosen, the system will default to All Sections.
 4. Place a check in the box to the left of the specific questions to be added.
 5. Press **Select Question(s) Quickly** to apply the selected questions to the job posting.
 6. Select **Question Selection Completed** to finalize the question selection process OR choose to further define the question settings by following the steps outlined below.

Further defining the question settings

- You can review and revise settings and options available for each question prior to posting the job.
 - Changes to the Answer Grade and Fail Flag does not affect the default configuration of a question. Changes only affect this instance.
1. From the Preview Selected Questions & Answers page, click the name of a Question Category to see the list of questions associated with the category.
 2. Select the section in which the questions should be presented and responses collected.
 3. Click **Define Question Settings**.

The Manage Jobs - Preview Selected Questions and Answers page opens.

4. Make any changes to the question setting.
5. Once you have made all your changes click **Save**.
6. Once you have selected all the questions and made all the changes, click **Question Selection Completed**.

Limited job postings

In this section

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Limited job postings

Limited job postings are job postings that are available only to a specific set of candidates.

Key info

- Limited job postings do not appear on any career sites and are not sent in the nightly feed to job boards.
- Candidates are made aware of a limited job posting by receiving a **link to the posting** (see "**Send a candidate a link to a limited job posting**" on page 78). When a candidate clicks the link, the posting opens on a Candidate Experience career site.
- Limited job postings are only available on Candidate Experience external career sites. (Not currently available on Candidate Experience internal career sites.)

Good to know

- **Creating a limited job posting** (see "**Create a job posting**" on page 74) in Rival Recruit is the same as creating any other job posting—except you select *Limited* for Job Posting status.
- Changing the job posting status of a limited job posting requires that you **add a rule to change the status** (see "**Add a rule to change the job posting status of a limited job posting**" on page 78).

Send a candidate a link to a limited job posting

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.

Tip: Set the Posting Status filter to Limited to see only limited job postings.

3. In the list, click a job title.

The Job Posting Details page opens.

4. Scroll to the bottom of the job details.
5. In the Candidate Experience (CX) Career Site Link(s) section, click  to copy the job posting's link.
6. Paste the link into an email, chat box—or any other way you electronically communicate with the candidate.

The candidate can then click the link and view the job posting in Candidate Experience and apply if they want.

Add a rule to change the job posting status of a limited job posting

- Changing the job posting status of a limited job posting works differently than other job postings. You must add a rule to change a limited job posting's job posting status.

- Prerequisite: The *Automatic Job Posting Status Change* setting must be **enabled** (see "**Turn on automatic job posting status change rules**" on page 222).

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job title.

The Job Posting Details page opens.

4. Click  and click **Edit This Job**.

The Edit Job Posting - Position Details page opens.

5. Scroll to the Status Change Rules field.
6. Click **Add a rule**.
7. From the Change the status to drop-down, select a posting status.
8. From the On date field, select the date for the status change to occur.
9. Click **Save**.

After you create a rule and save the job posting, the rule takes effect after midnight of the day that was selected for the rule once the system has processed all status changes for that day.

Twenty four hours before a job posting's status is set to change, an email notification is sent to the recruiter, recruiter manager, and hiring manager associated with the job. A confirmation email is also sent to those same users once the rule is enforced.

Tip: You can only edit or delete a rule if that rule has not been enforced yet.

Remote job location

The remote job location functionality provides system users the option to create remote as a job location worldwide, in a country, and in a state/region/province.

Key info

- The remote job location functionality is available for active Candidate Experience career sites that have the Candidate Experience redirect enabled. It is not available for legacy career sites (ePosting sites).
- This is a self-service feature administrators can turn on.

Good to know

- If you currently have a remote location set up, you will want to reassign active job postings to the new remote locations and then deactivate the previous remote company location.

Turning on remote job location

The remote job location functionality is off by default. Administrators can **turn on** (see "**Turn on the remote job location functionality**" on page 221) (enable) this feature.

Creating the three types of remote locations

Admin users can create remote company locations for:

- **Worldwide** (see "**Create a worldwide remote location**" on page 177)
- **Countrywide** (see "**Create a countrywide remote location**" on page 178)
- **Statewide** (see "**Create a statewide remote location**" on page 178)

After these remote locations are created, they are available for selection when creating requisitions, job templates, and job postings. They are also available from the *Search jobs by location* filter on the Job List page on a Candidate Experience career site.

Selecting a remote job location on a job posting

To create a job posting that is:

- Remote worldwide, select the Remote worldwide option from the *Job Location Code* field. The *Country* field then populates as Remote (Worldwide). Example:

Location Details	
Job Location Code	Remote (Worldwide) (200-REMWW)
Country *	Remote (Worldwide)

- Remote in a specific country, select the Remote countrywide option from the *Job Location Code* field. In the *Country* field, select a country. Example:

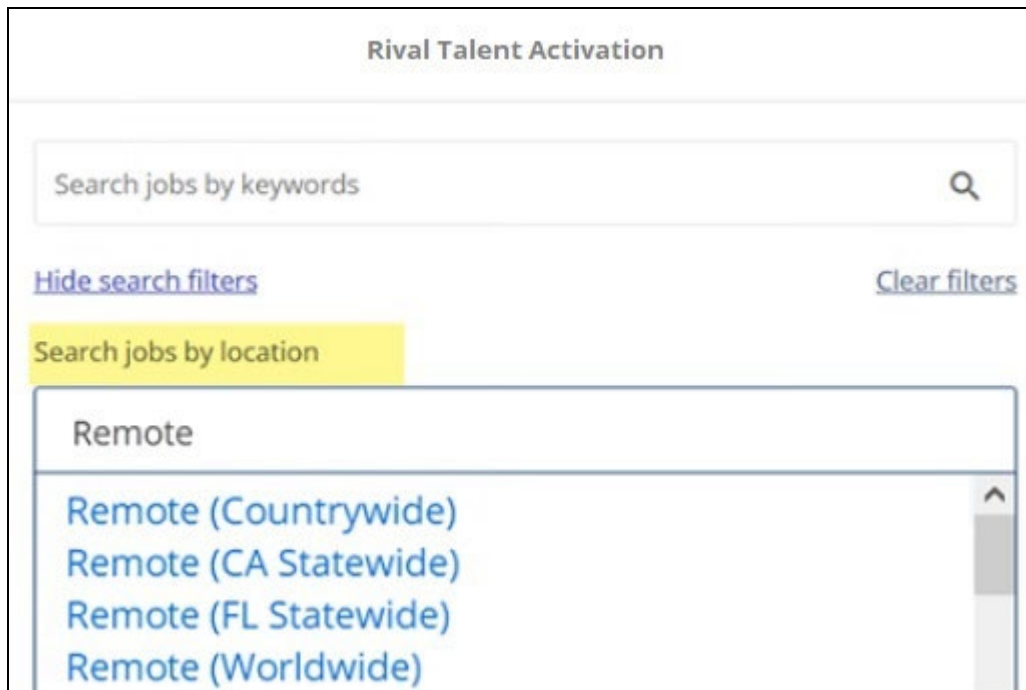
Job Location Code	Remote (Countrywide) (300-REMCW)
Country *	United Kingdom
State	REMOTE
Additional Locations	

- Remote in a specific state, select the Remote statewide location (specific to the state) from the *Job Location* field. Fields pre-populate except zip code. Type **99999** in the zip code field. Example:

Job Location Code	Remote (CA Statewide) (100-REMSW)	
Country *	United States	▼
Address Line 1		
Address Line 2		
City *	Remote	
State	California	▼
Zip/Postal Code *	99999	

Remote job location in Candidate Experience

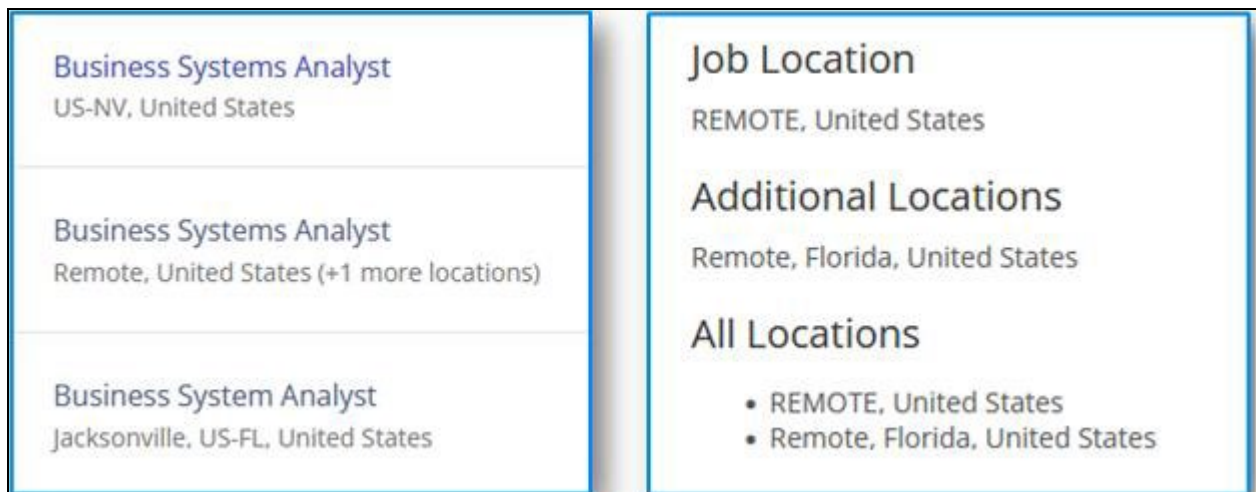
When a remote job location is assigned to your job posting, the various remote company locations display in the Search jobs by location filter:



The screenshot shows the 'Rival Talent Activation' search interface. At the top is a search bar labeled 'Search jobs by keywords' with a magnifying glass icon. Below the search bar are two links: 'Hide search filters' and 'Clear filters'. A yellow highlight is placed over the 'Search jobs by location' section. This section contains a dropdown menu with the following options: 'Remote', 'Remote (Countrywide)', 'Remote (CA Statewide)', 'Remote (FL Statewide)', and 'Remote (Worldwide)'. A scroll bar is visible on the right side of the dropdown menu.

The candidate can quickly make their selection and search for jobs in the different remote locations.

The remote locations can be displayed on the Job List Page and Job Posting Details page of your Candidate Experience site in a couple different formats. Here are two examples:



The image shows two examples of how job locations are displayed. The left example is a list of three job postings, each with a title and location: 'Business Systems Analyst' (US-NV, United States), 'Business Systems Analyst' (Remote, United States (+1 more locations)), and 'Business System Analyst' (Jacksonville, US-FL, United States). The right example is a detailed view of a job location, showing 'Job Location' as 'REMOTE, United States', 'Additional Locations' as 'Remote, Florida, United States', and 'All Locations' as a bulleted list: 'REMOTE, United States' and 'Remote, Florida, United States'.

When using the Remote location option, it is important the Candidate Experience administrator pay close attention to the Job Location Details setting on the Job List page in the CX Admin portal. Notice the highlighted text:

Job Location Details

Select the option below that represents the way you would like the job location information to display for every job listed on your career site job list page.

Please keep the following in mind when making your selection here: If you use 'Remote' as a city name for any job posting, and you have selected a state/province/region and country for that job posting, ex: Remote, Florida, United States, when you select any of the following 3 options from the drop-down below, it will not be clear to the job seekers that the position is posted as being remote in a specific state/province/region.

- City
- City, Country Code
- City, Country Name

Job Location Format

City, State Name, Country Name - (ex: Miami, Florida, United States)

Display count of additional locations

Evergreen jobs

Evergreen jobs are positions that are always open at your organization. They are typically jobs for which you have many employees in the same role or may have a high turnover rate. Hiring managers are constantly looking for candidates for evergreen jobs.

Key info

- In Rival Recruit, an evergreen job is when an administrator or recruiting manager role creates a new job posting and selects the Evergreen Job option on the **Create Job Posting page** (on page 67).
- Once the evergreen job is created, the system *automatically* creates a cloned evergreen job posting whenever the evergreen job is closed upon hiring an applicant.
- The cloned evergreen job contains all the details of the original evergreen job posting but has a different tracking code and Job ID. This means that it is a newly posted job (including when posted to third-party job boards).
- A **system setting** (see "**Set evergreen job postings setting**" on page 221) controls which hiring stages (and applicants tied to the original evergreen job posting) are moved to the cloned evergreen job.

Good to know

- If an evergreen job posting is no longer needed, it can be permanently **closed** (see "**Closing an evergreen job permanently**" on page 88).

- The **Evergreen Job Postings report** (see "**Requisition and job reporting**" on page 261) shows information about a selected evergreen job posting and all the evergreen job postings that were cloned from that original evergreen job.
- The **Time to Fill report** (see "**Budgeting and fee reporting**" on page 262) can be filtered to include or exclude evergreen jobs.

Post job via social media

- If this feature is enabled for your Rival Recruit instance, you can post *external* jobs via social media. Internal jobs cannot be shared via social media.
 - Don't have this feature but want it? Contact Rival Support.
 - You must have administrative permissions and/or a company human resources account to the social media site(s) you want to share jobs on.
1. From the navigation menu, click **Dashboard>Jobs**.
 2. Scroll down to the Career Site Postings section.
 3. In the list for the job you want to share, hover your mouse over the Share button.
 4. Select a social media site.
 5. Follow steps provided for the site you selected.

Managing and editing job postings

Not all job boards operate in the same way. Some boards permit unlimited edits while others do not allow edits at all. Some boards charge for certain edits. Note that if you request an edit, a job board may charge you an additional posting fee.

Rival does not control or assume responsibility to inform our customers about a job board's pricing policy for edits. Rival does not provide compensation for such charges when they occur.

Note: Ensure you understand the policy of the job board before making an edit.

Edit a job posting

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job title.

The Job Posting Details page opens.

4. Click  and click **Edit This Job**.

The Edit Job Posting - Position Details page opens.

5. Click  and select an edit option.
6. Make your changes.
7. Click **Save**.

Change a job's status

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In a job's Posting Status column, click its status.
4. On the pop-up, select a status.
5. Click **Apply**.

Clone a job posting

- Cloning creates an exact copy of an existing active or inactive job posting.
 - A cloned job posting is created with an On Hold status. To make it available for viewing, you must change the status.
1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job title.

The Job Posting Details page opens.

4. Click  and click **Clone This Job**.
5. On the confirmation pop-up, click **OK**.

The Edit Job Postings - Position Details page opens.

6. Make your changes.
7. Click **Save**.

Add additional locations to an existing job posting

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) a job.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click  and select **Add Additional Location**.
5. On the pop-up, type a location and select it.
6. Click **Continue**.

Remove additional locations from an existing job posting

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) a job.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Remove Additional Location**.
5. On the pop-up, type a location and select it.
6. Click **Continue**.

View an attachment on a job posting

- This topic only applies if the add attachments feature is enabled on your system and a job posting contains an attachment.
- Recruiting managers, administrators, and recruiters can view attachments attached to job postings.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

(If applicable) Filter to limit search results.

2. In the list, click a job title.

The Job Posting Details page opens.

3. Click  and click **Edit This Job**.

The Edit Job Posting - Position Details page opens.

4. Click  and select **Edit Job Posting-Attachments**.

The Edit Job Posting-Attachments page opens.

5. Double-click an attachment.

Remove an attachment from a job posting

- This topic only applies if the add attachments feature is enabled on your system and a job posting contains an attachment.
- Recruiting managers, administrators, and recruiters can remove attachments from job postings.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

(If applicable) Filter to limit search results.

2. In the list, click a job title.

The Job Posting Details page opens.

3. Click  and click **Edit This Job**.

The Edit Job Posting - Position Details page opens.

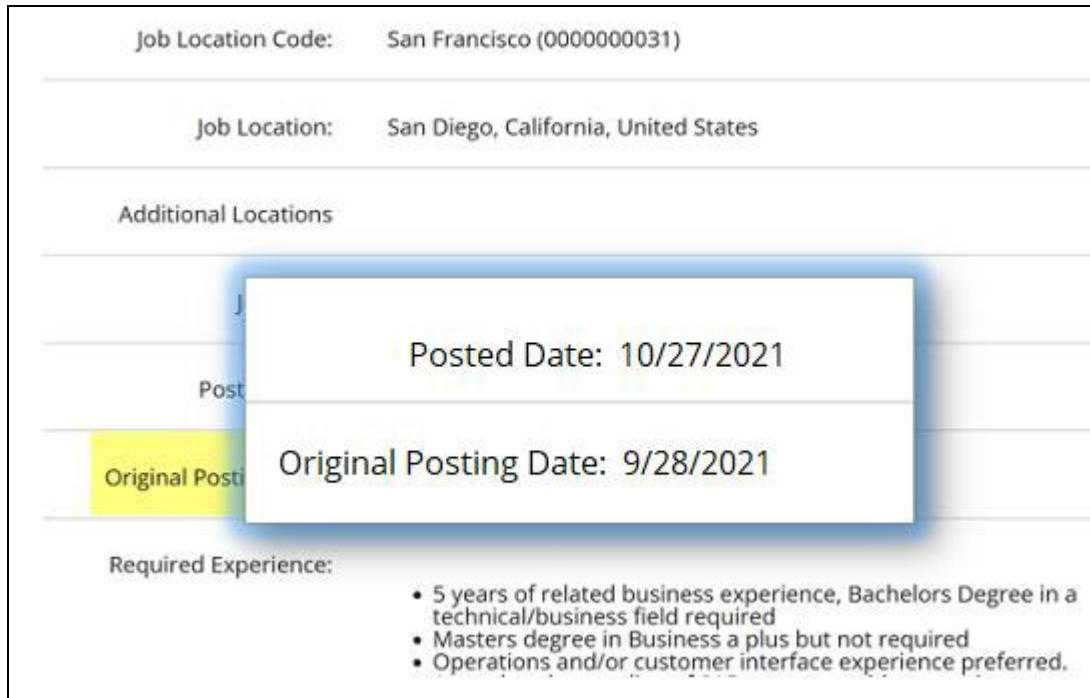
4. Click  and select **Edit Job Posting-Attachments**.

The Edit Job Posting-Attachments page opens.

5. Click the check box beside an attachment.
6. Click **Remove Selected**.
7. On the confirmation pop-up, click **OK**.

Posted Date vs. Original Posting Date field

When you view a job posting, you will notice two date fields: Posted Date and Original Posting Date.



Job Location Code: San Francisco (0000000031)

Job Location: San Diego, California, United States

Additional Locations

Posted Date: 10/27/2021

Original Posting Date: 9/28/2021

Required Experience:

- 5 years of related business experience, Bachelors Degree in a technical/business field required
- Masters degree in Business a plus but not required
- Operations and/or customer interface experience preferred.

Field	Description	Editable	Used on the Time to Fill Report to ensure accuracy
Posted Date	The date a job is created in Rival Recruit. This date can be used to refresh postings on internal or external career sites. Note: If a job is initially put on hold, this date does not populate until the job is off hold.	Yes	No
Original Posting Date	The date a job is first posted on internal or external career sites. Note: If a job is initially put on hold, this date does not populate until the job is off hold.	No	Yes

Print job posting details

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job title.

The Job Posting Details page opens.

4. Click  and click **Edit This Job**.

The Edit Job Posting - Position Details page opens.

5. Click  and click a page to go to.

Example: If you want to print budget and detail information, click **Edit Job Posting - Department & Budget Details**.

6. Click  and click **Print**.

Activating, reassigning, and removing jobs

The Jobs page allows recruiters, recruiting managers and hiring managers to search for job postings. Searches can be conducted using the Quick Search feature or Advanced Search.

Activate a job

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) a job or jobs to activate.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click  and select **Activate**.
5. On the confirmation pop-up, click **Continue**.

Deactivate (close) a job

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

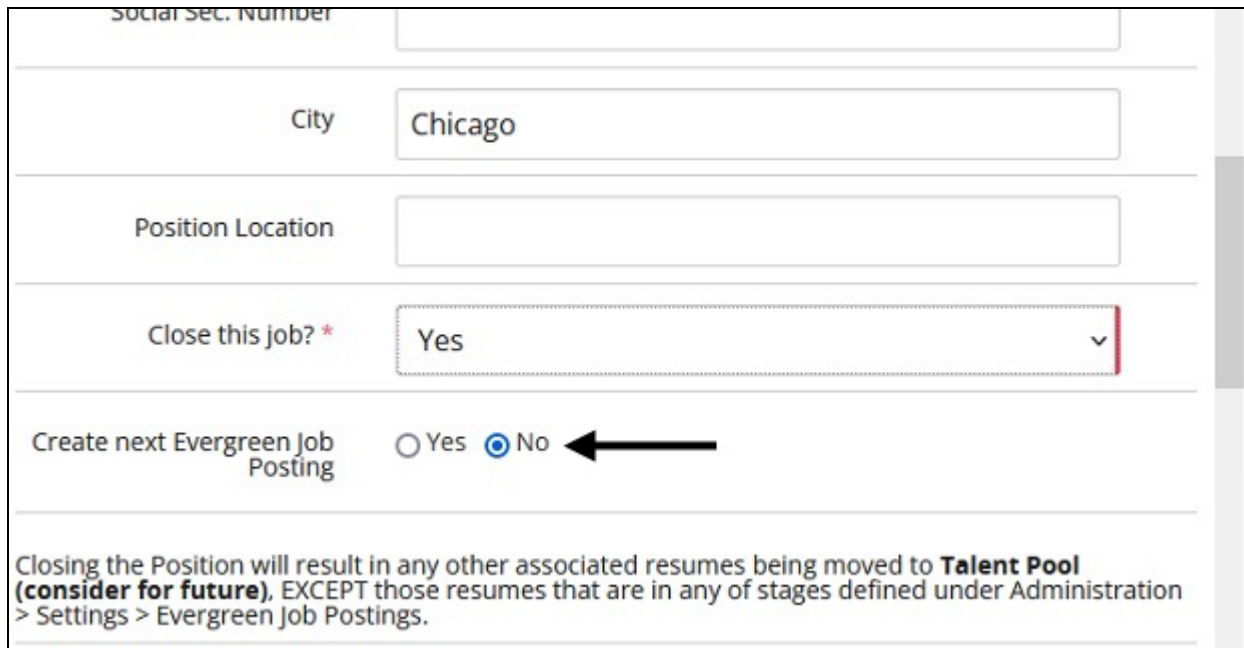
2. (If applicable) Filter to limit search results.
3. Click (check) a job.

4. Click  and select **Deactivate**.
5. On the warning pop-up, click **Continue**.

Closing an evergreen job permanently

If you decide you do not want to hire for an evergreen job any longer—perhaps you hired everyone you need—you can close it permanently.

Closing an evergreen job is similar to closing other jobs. After you move a candidate to the hired stage, close the job on the Move Resume page. There is additional option for evergreen jobs:



For the Create next Evergreen Job Posting option, select **No**. On the confirmation pop-up page, click **OK**. The evergreen job is closed and no more applicants can be hired for that job. The job becomes the last job shown for this position on the Evergreen Job Postings report.

Reassign jobs to another recruiter (bulk reassign)

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Recruiter**.
5. On the Reassign Recruiter pop-up, type a recruiter's name and select it.
6. Click **Continue**.

Reassign jobs to another recruiting manager (bulk reassign)

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Recruiting Manager**

5. On the Reassign Recruiting Manager pop-up, type a recruiting manager name and select it.
6. Click **Continue**.

Reassign jobs to another hiring manager (bulk reassign)

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Hiring Manager**
5. On the Reassign Hiring Manager pop-up, type a hiring manager name and select it.
6. Click **Continue**.

Assign jobs to a fee agency (bulk assign)

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to assign to a fee agency.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Assign to Fee Agency**.
5. On the Assign to Fee Agency pop-up, type a fee agency name and select it.
6. Click **Continue**.

Remove jobs from a fee agency (bulk remove)

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to remove from a fee agency.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Remove from Fee Agency**.
5. On the Remove from Fee Agency pop-up, type a fee agency name and select it.
6. Click **Continue**.

Reassign jobs to a different business unit

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Business Unit**.
5. On the Reassign Business Unit pop-up, type a business unit and select it.
6. Click **Continue**.

Reassign jobs to a different company location

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Company Location**.
5. On the Reassign Company Location pop-up, type a fee agency name and select it.
6. Click **Continue**.

Reassign jobs to a different department

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Department**.
5. On the Reassign Department pop-up, type a department and select it.
6. Click **Continue**.

Reassign jobs to a different job category

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Category**.
5. On the Reassign Category pop-up, type a job category and select it.

6. Click **Continue**.

Reassign the replies to email notification for jobs to a different user (bulk reassign)

- The *Replies emailed to* field on a job posting is the email address that receives an email notification when a candidate submits a resume to a job posting.
- You may want to change the *Replies emailed to* email address so that a different user gets notified. You can do that in bulk for multiple jobs. This topic shows you how.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Replies Emailed To**.
5. On the pop-up, find the user you want. Here are some options:
 - Begin typing the user name or email. A selection list opens and shows recruiters, recruiter managers, and administrators. Select the user from the list.
 - Type %% in the search field. Scroll the list and select a user from the list.
 - If a user is not in the search list, type the user's email address and then select the **Send To:** option. The system populates the selection list with the user's email address with a *Send To:* prefix. Select it from the list.

6. Click **Continue**.

Turn off (disable) the replies to email notification for jobs (bulk reassign)

- The *Replies emailed to* field on a job posting is the email address that receives an email notification when a candidate submits a resume to a job posting.
- You may want to disable the *Replies emailed to* email notification so that no one gets the email notification. You can do that in bulk for multiple jobs. This topic shows you how.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. Click (check) the jobs to reassign.

Tip: To select all jobs on the current page, click the check box in the column heading.

4. Click **Take Action** and select **Reassign Replies Emailed To**.
5. On the Reassign Replied Emailed To pop-up, type %% in the search field and select **Notifications Disabled** from the search results list.
6. Click **Continue**.

Tracking jobs

You can track all jobs in Rival Recruit using the Job Tracking (Classic) page.

Job Tracking (Classic) page

Recruiting managers use the Job Tracking (Classic) page to track jobs in Rival Recruit. This page provides information about job postings and current status. You also have access to review job posting details and hiring stage details.

Key info

- Only recruiting managers have access to this page.
- Filters help you view only the jobs you want to see.

This filter	Shows
Open	Open (active) jobs postings.
Closed	Closed (deactivated) job postings.
Filled	Filled job postings. A filled job posting is any active or inactive position for which there is a hired candidate. Tip: Click Resume link next to the job posting title to see the hired candidate(s).
Department	All open (active) job postings by department.
Status	All open (active) job postings by posting status.
Hiring Stage	All open (active) job postings by hiring stage. Job postings can appear in multiple hiring stages, depending on the candidates associated with the job posting.
Categories	All open (active) job postings by job category.

- Recruiting managers can use the *View as Recruiter* drop-down to view by a specific recruiter or recruiting manager or use the All option to view information for all recruiters/recruiting managers. By default, a recruiting manager's dashboard view shows information specific to their jobs.

Columns

Priority Indicator

The priority indicator is the colored bullet displayed in the first column of the job list. Green=Low Priority, Yellow=Medium Priority and Red=High Priority. The number of days that has elapsed since the job was created in Rival Recruit determines the job's priority. The exact number of days before the priority changes from low to medium or from medium to high is determined during the job posting process by the Recruiter.

Tip: Priority Indicator is NOT visible when you view by ALL. You must select a named person to view the priority indicator.

Job Title/Company Location

Displays the internal job title that users of Rival Recruit see when managing the job postings. The tracking code for the job posting is displayed under the title. The location of the job posting is also indicated. Clicking on the job title will bring the user to the Job Posting Details screen.

Resumes

Displays the number of candidates associated with the job posting that reside in any Hiring Stage from the Job Applicant stage up to, but not including the Hired stage. The number will not reflect those candidates that have been moved to any stage after the Hired stage since those candidates are no longer in consideration. Clicking on the number in the Resumes column will load a list of candidates associated to the job posting that are in active consideration.

Tip: If you are accessing the Resumes column from the *Closed* Job Tracking screen, the column displays the number of candidates associated with the job posting that reside in ANY Hiring Stage. Clicking on the number in the Resumes column will load a list of candidates associated to the job posting.

Reviews Requested (Completed)

Displays the number of candidates that have been forwarded for review in Rival Recruit. The completed number in parentheses refers to how many of those reviews have been completed.

Interviews Requested (Completed)

Displays how many interview requests have been submitted to other users of Rival Recruit. The completed number in parentheses refers to how many of those interviews have been completed.

Hiring Manager

Displays the full name of the hiring manager assigned to the job posting.

Job Status

Indicates whether the job posting is actively being recruited for and where it is being displayed (Normal, External, Executive, Waiting Approval, On Hold).

Post Date/Days Old

Displays the date the job posting was created in Rival Recruit and the number of days that have elapsed since it was originally posted.

Farthest Stage

Displays the name of the Hiring Stage the farthest candidate has reached. For example, if there are 5 candidates being considered for the opening and 2 are undergoing an initial review by the Recruiter, 2 are being interviewed and 1 has an offer extended, the farthest stage would be "Offer Extended."

Workflow

Displays the workflow for the selected job. The workflow column is not displayed when you view by ALL. You must select a named person to view the workflow.

Date Deactivated

(Available only on the "Closed" Job Tracking screen)—displays the date in which a job posting was filled.

Tip: Terminology in this column vary as customers have their own naming convention for tracking the status of candidates.

Candidate record

Each candidate record contains the following information (if available):

Job Score

Displays a value based on a comparison of the candidate resume and job posting. Job score algorithm measures the top 100 most used words (excluding stop words like "the, and, but, etc.") from the job title, job description, skills and experience, and then counts how many of the candidate's resume's top 100 words match. A higher score indicates a closer match between candidate and job.

Note: Displaying the job score is an optional account configuration. N/A will display for companies that disable this feature.

Candidate, Location, Source

Displays the full name of the candidate, the City/State/Country of residence as well as the source of their resume. Clicking on the name of the candidate will display his/her individual record.

Enter Date, Last Modified

Displays the date the candidate was entered into Rival Recruit and when the last update was made to the candidate record.

Current Stage

Displays the candidate's status based on the hiring stages. The recruiter is responsible for updating the status of the candidate.

Evaluation / Fail Flag

Displays the candidate's evaluation score as a decimal. The maximum score for any candidate is 1.00 (or 100%). The evaluation column is calculated as Total # points candidate received / Total # points available. The fail flag column indicates a fail response to a flagged question.

Disposition

If a candidate has not been hired for a position, the disposition value is used to indicate why a candidate has been rejected for future reporting purposes. These values are assigned by recruiters.

Qualified

For U.S. Department of Labor reporting requirements, recruiters can indicate if an applicant is qualified or not qualified for the position they are associated with.

Hot match and job score

Hot match is a system comparison between resume profiles and active job postings. The top 50 matches in the database—without a minimum threshold—are shown. Any candidate in the top 50 list in bold font is already associated to the job. Any candidate in the top 50 list not in bold is not tied to this job.

Job score results tell you how well the candidate's resume matches a job description. Job score is available on a candidate profile and elsewhere in the system in result grids. Sort columns to see **Job Score %** in descending order (results will show the highest percent at the top of the list in descending order).

They are similar in that both search and compare resume content to the job details. The difference is how you access the results.

Algorithm

An algorithm controls how hot matches and job score work. The algorithm:

- Searches the job title, job description, skills and experience against all candidates
- Uses the top 100 most used words
- Excludes common words: the, and, but, when, it, do, etc.
- Indicates how strong a match the candidate is (30 – 40s = strong match)
- Searches the entire database, even the *Do Not Consider For Future* candidates
- Bolds candidates already tied to job

Good to know

- Resumes do not get scored immediately upon creation
- System checks every 30 minutes for new resumes and changes made to existing resumes
- System checks every 30 minutes for new jobs and changes made to existing jobs
- System scores or rescores every 30 minutes

Source passive candidates

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Source passive candidates overview

Passive candidates are not actively looking for a new job but possess desirable qualifications for your open roles. They are valuable because they represent an untouched source of talent.

With the source passive candidates search tool in Rival Recruit, you can tap into a global **database** (see "**Passive candidate database refresh**" on page 98) of millions of passive candidate profiles and identify those likely to move into new jobs. The search tool uses patented Artificial Intelligence (AI) to identify candidates with the skills you are looking for and likely open to new opportunities.

Key info

- Use the **passive candidate search tool** (see "**Source Passive Candidates search tool**" on page 101) to search for passive candidates. Use **filters** (on page 103) to narrow your search. **Talent pool insights** (on page 105) also narrow your search. Use them separately or together to get the right subset of candidates.
- There are two ways to source passive candidates:

Use this access method:	To:
Navigation bar	Perform an open search (see " Source for passive candidates (open search) " on page 111). An open search starts with your default location (from your My Account) and you use filters (on page 103) to find candidates.
Job posting	Perform a search associated to a specific job posting (see " Source for passive candidates for a job posting " on page 113): This type of search uses the content of the job posting to prepopulate filters (on page 103) so that the search is narrow and tailored to the job.

- Find the passive candidates you want? View their **profiles** (see "**Profile**" on page 106). If they are a good fit, engage with them and even **import** (see "**Import a passive candidate into Rival Recruit**" on page 114) their profile into Rival Recruit.

Good to know

- Recruiting managers and recruiters have the source passive candidates feature by default. If hiring managers or other users in your organization want this feature, **assign the source passive candidate permission** (see "**Assign user permission to source passive candidates**" on page 234) to them.

- **Unbiased sourcing mode** (on page 98) is an effective way to ensure an objective, fair, and inclusive hiring process. An administrator or recruiting manager can **turn on** (see "**Turn on unbiased sourcing mode options**" on page 98) this option for your organization.
- **Diversity and inclusion settings** (on page 99) helps your organization build diverse teams. An administrator or recruiting manager can **select the diversity and inclusion settings** (see "**Select diversity and inclusion settings**" on page 100) for your organization.

Passive candidate database refresh

The passive candidate database undergoes scheduled refreshes to ensure that candidate profiles are updated with the most current information. There are two refresh frequencies: weekly and monthly. This dual refresh approach ensures the data integrity of candidate profiles.

Refresh frequency	Description
Weekly	Keeps profile information current for priority candidates. Priority candidates are those who frequently appear in your searches, are often viewed, or are added to projects.
Monthly	Maintains up-to-date information for all candidates in the passive candidate database.

Unbiased sourcing mode

Unbiased sourcing mode helps reduce unconscious bias when searching for candidates and encourages an objective, and inclusive hiring process. Your recruiting manager or administrator can **turn on** (see "**Turn on unbiased sourcing mode options**" on page 98) unbiased sourcing mode options based on your company's anti-bias initiatives and goals.

Note: The options are not user-specific. They apply across your entire organization.

Here are the options.

This option:	Prevents:
Anonymize names	Bias based on gender or ethnicity
Hide photos	Bias based on appearance, gender or ethnicity
Hide school names	Bias based on academic background and/or place of origin
Hide employment gaps	Bias based on lifestyle changes (e.g., family leave, unemployment, etc.)
Hide employers	Bias based on your personal perception of specific brands or industries
Hide years of experience	Stereotyping and discrimination based on age, by only showing the last 5 years of employment history
Hide graduation dates	Age bias by hiding academic timeline and graduation year
Substitute gender-specific pronouns	Gender bias by showing a gender neutral pronoun

Turn on unbiased sourcing mode options

Note: The settings apply across your organization. They are not user-specific.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Source Passive Candidates** link.

The Source Passive Candidates options page opens.

3. Select an **option or options** (page 98) to toggle on.

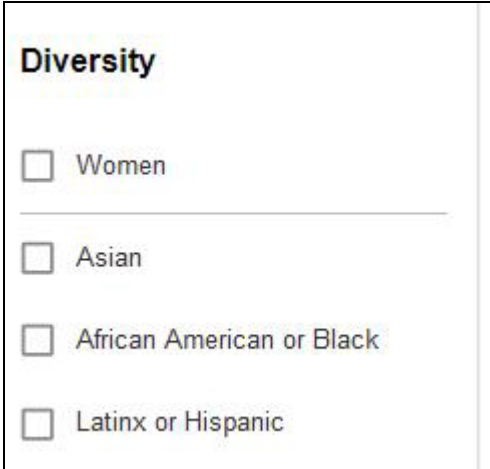
Tip: To select all options, click **Select All**.

4. Click **Save**.

Diversity and inclusion settings

Diversity and inclusion settings allow your company to build diverse teams. **Select diversity and inclusion settings** (on page 100) according to your company's diversity initiatives and goals.

Note: The settings are not user-specific. They apply across your entire organization.

Setting	Description
Diversity types	Select the diversity types that will be available in the Diversity filter when searching for passive candidates: ▶ Women ▶ Men ▶ African American or Black ▶ Latinx or Hispanic ▶ Asian ▶ White ▶ Other ethnicities ▶ Veterans Example: If you select Women, Asian, African American or Black, Latinx and Hispanic here, then the Diversity filter will have those filter options: 

Select diversity and inclusion settings

Note: The settings apply across your organization. They are not user-specific.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Source Passive Candidates** link.

The Source Passive Candidates options page opens.

3. Select the **diversity and inclusion settings** (page 99) for your organization.

Tip: To select all diversity and inclusion settings, click **Select All**.

4. Click **Save**.

Source Passive Candidates search tool

This search tool makes it easy to source passive candidates. Let's look at some key elements.

The screenshot shows the Source Passive Candidates search tool interface. It includes a sidebar with filters for Job Title, Skills, and Exclusions. The main area displays a Search Summary, Talent Pool Insights, and various filters like Companies, Highlights, and Industries. Numbered callouts 1 through 5 highlight specific features: 1. Start Over button, 2. Search Summary, 3. Filters sidebar, 4. Talent Pool Insights, and 5. Action button (three dots icon).

	Name	Description
1	Start over	Click Start Over to clear the current search criteria and start over.
2	Search Summary (on page 104)	Shows the search string you built (in easy-to-read text) and a count of search results, candidates likely to move, and diversity candidates.
3	Filters (on page 103)	Select the filters to build a search. Tip: A bubble count (yellow circle) indicates the number of selections made within a filter.
4	Talent pool insights (on page 105)	AI generated insights based on the talent pool from the search results. Tip: Click an insight to add it as a filter for the search.
5	Action button	Click to access unbiased sourcing mode (on page 98)/ diversity and inclusion settings (on page 99). Tip: The action button is only visible to users with the Settings Access permission (see " User permissions " on page 225).

Search results

As you select filters, the system generates search results and displays **profiles** (see "**Profile**" on page 106) in the Candidates section just below Talent Pool Insights.

Candidates

Show All Results

Reina Rival

founding software engineer

reina.rival@go-go.com

San Francisco, California university of ontario

23 Years Total Experience

software engineer 2022 - Present

+13 POSITIONS

Likely To Move

Has a recent tenure of 5+ years.

Has an average job tenure of 1+ years.

Turnover rate at Design, Inc for the past 12 months is 8%.

Has 20+ years of professional experience.

Highlights

In High Demand Unicorn Company

Top School in Europe Entrepreneur

Sarah Silk

sarah.silk@srt-by.com

Greenwood, Indiana Bloc

22 Years Total Experience

Use the **Show** filter to filter results. Here's how that works.

This option:	Does this:
Exact Results Only	Shows profiles where the: - Job title or titles selected in the filter section are found as the current job title or previous job title. No inferred or predicted job titles are considered or displayed in the Search match section. - Skill or skills selected in the filter section are found as self-reported skills. No inferred or predicted skills are considered or displayed in the Skills Match section. Tip: Exact Results Only is the default option.
All Results	Shows profiles where the: - Job title or titles selected in the filter section are found as the current job title or previous job title and any job titles that the system predicts could be the job title of the candidate's next job. Both the actual job title and predicted/inferred job titles are shown in the Search Match section. - Skill or skills selected in the filter section are self-reported or predicted/inferred. Both self reported and predicted/inferred skills are

This option:	Does this:
	shown in the Skills Match section.

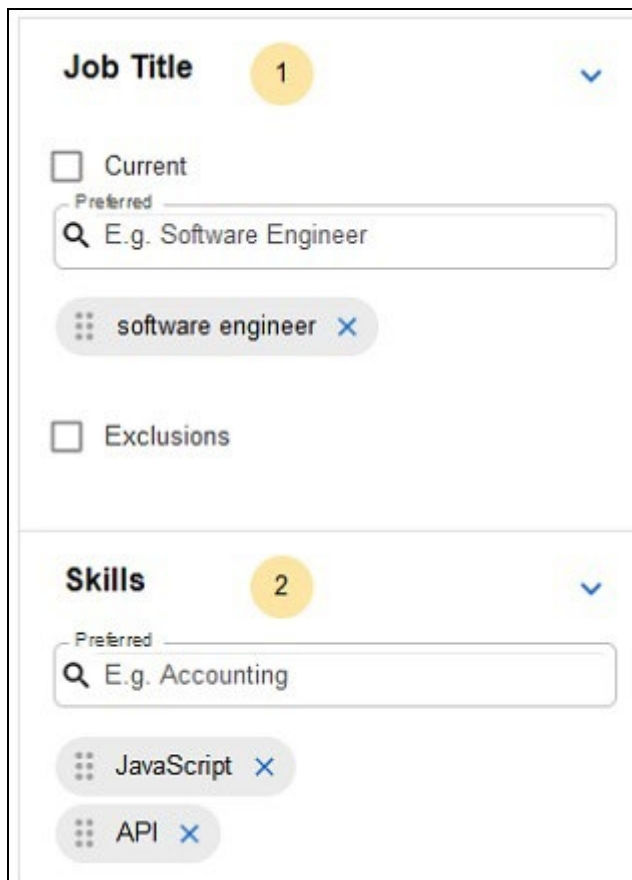
At the bottom of the search results, there's a page filter:



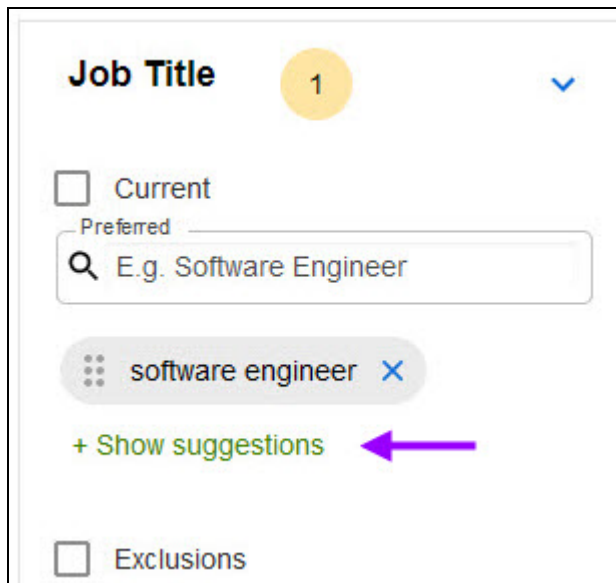
You can select the number of search results to appear per page: 10, 20 (the default), and 50. You can also page forward or backward or go to a specific page.

Filters

Filters appear on the left side of the search page. They help narrow down your search so you can zero in on the right candidates for a job or build your general candidate pool..



When you type an entry into a filter and select it, the selection becomes a gray chip. AI then generates intelligent selections similar to what you chose, which are grouped under *+Show suggestions*:



Click **+Show suggestions** to view and select additional filter items.

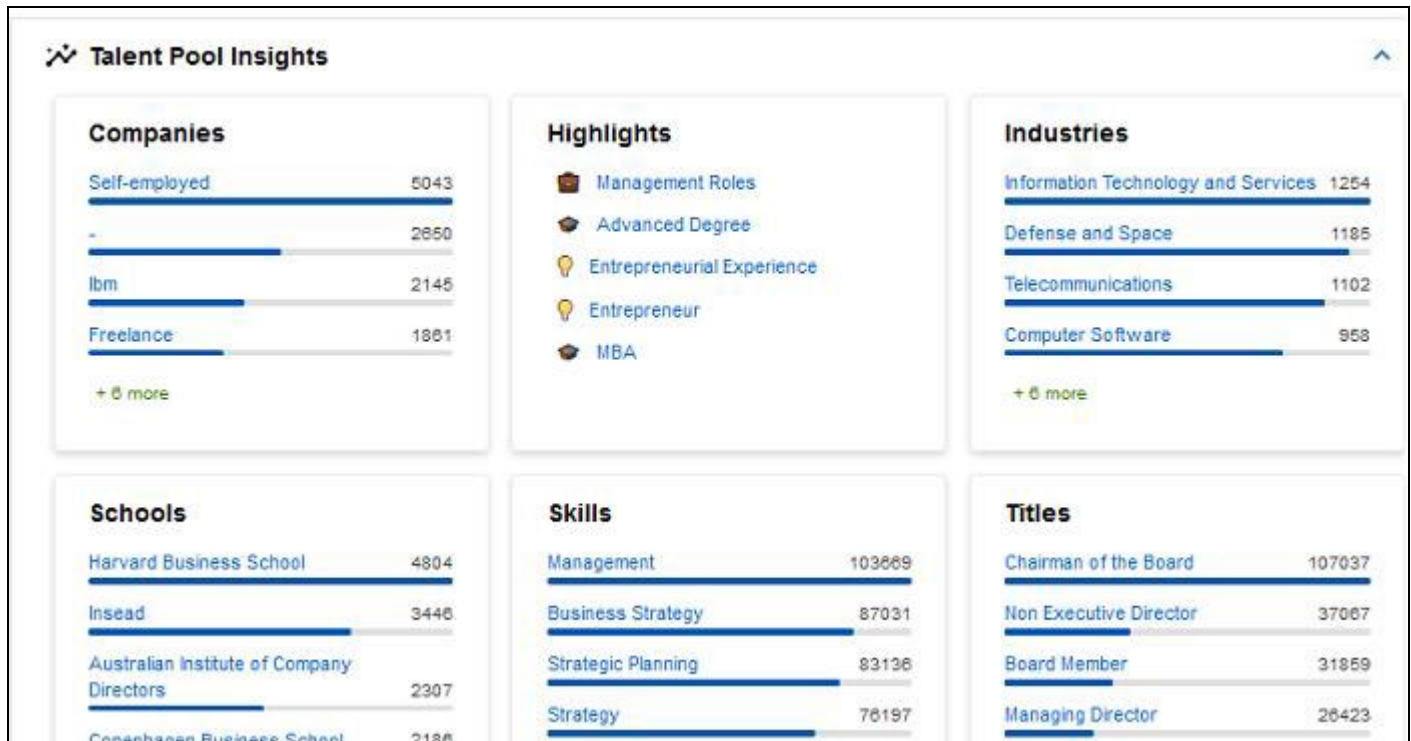
Search Summary

The Search Summary shows a text version of your search query, number of search results, candidates more likely to move, and diversity candidates. Click a box to dig deeper into those results.



Talent pool insights

Talent pool insights are system-generated insights based on the talent pool from the search results.



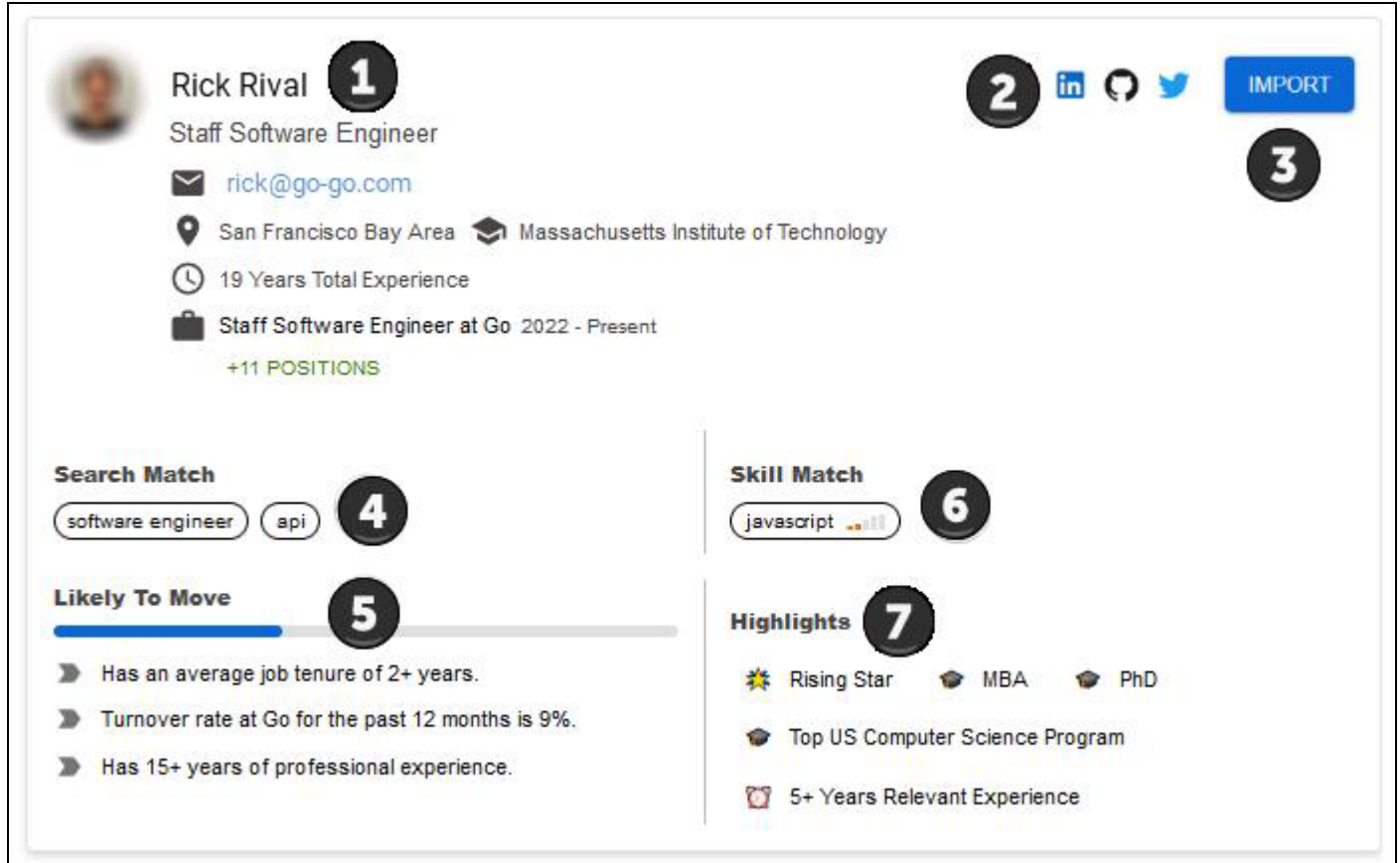
Talent pool insights populate after you apply at least one job title or skill as a filter.

Click a talent pool insight to create a subset of candidates based on that insight. For example, if you want only candidates who attended Harvard, click the **Harvard Business School** insight.



Profile

A profile is a summary view of a candidate's career history, skill level, key achievements, career progression, likeliness to move, social footprint, and more. It's an essential component of the system because it contains the information you need to source candidates.



1 Rick Rival
Staff Software Engineer
rick@go-go.com
San Francisco Bay Area Massachusetts Institute of Technology
19 Years Total Experience
Staff Software Engineer at Go 2022 - Present
+11 POSITIONS

2 [Social Media Icons] **3** IMPORT

4 Search Match
software engineer api

5 Likely To Move
Has an average job tenure of 2+ years.
Turnover rate at Go for the past 12 months is 9%.
Has 15+ years of professional experience.

6 Skill Match
javascript

7 Highlights
Rising Star MBA PhD
Top US Computer Science Program
5+ Years Relevant Experience

Here are some key elements of a profile.

	Name	Description
1	Candidate information	Shows candidate name, contact info, city, university, years of experience, and more. Tip: Click the candidate name to view their full candidate profile, which shows detailed education, job history, and more. Matching keywords from filters are highlighted—like job title and skills.
2	Social media links	Shows the top three social media links. Click an icon to go to that candidate's social media site
3	Import	This button appears when a candidate does <i>not</i> have a profile in Rival Recruit. Click it to import the candidate into Rival Recruit. Tip: The system uses a candidate's email address to determine if they have a profile in Rival Recruit.

	Name	Description
	View ATS Profile (not shown in graphic)	This button appears when a candidate already has a profile in Rival Recruit. If the candidate is: ▶ Not linked to a job posting (open search) or linked to one job posting, clicking opens the candidate profile (on page 125). ▶ Linked to two or more job postings, clicking opens the Candidate Pool page.
4	Search match	Shows matches to your search query
5	Likely to move (see " Likely to move overview " on page 107)	Uses predictive variables and artificial intelligence to predict candidates who are most likely open to a new opportunity
6	Skills match	Shows matches to the skills criteria from your search query
7	Highlights (on page 108)	Highlights aspects of candidate such as education, career achievements, and more

Likely to move overview

This feature analyzes dozens of predictive variables and uses AI to predict candidates who are most likely open to a new opportunity. High-scoring candidates are two times more likely to change jobs in the next 90 days and have 19% higher email engagement rates than low-scoring candidates.

Likely to move also offers context around each candidate's prediction score by showing some of the signals yielding the results like a candidate's average job tenure, recent work anniversaries, company turnover rates, and recent company news.

Leverage these insights to prioritize candidates who are more receptive to new opportunities, personalize your outreach messaging, and optimize your recruiting strategy.

Likely to move prediction score

On a profile, a bar graph shows a candidate's likely to move prediction score. This helps you easily identify candidates who are likely to move.

Low likely to move score

+ LIKELY TO MOVE



▶ Has a recent tenure of 10+ years.

High likely to move score

+ LIKELY TO MOVE



▶ Has a recent tenure of 1+ years.

Filtering

You can filter searches to prioritize candidates with a high likely to move prediction score.

For search results, apply the *More Likely to Move* filter to view candidates that the algorithm predicts are more likely to move:

Number of Results ⓘ 4,479	More Likely to Move 198	Diversity 4,378
------------------------------	----------------------------	--------------------

Highlights

Highlights help you quickly see candidates' strengths so you can learn about their unique value. They appear on a candidate's profile:

Likely To Move	Highlights ←
- Has a recent tenure of 5+ years. - Has an average job tenure of 1+ years. - Turnover rate at Plume Design, Inc for the past 12 months is 5%. - Has 20+ years of professional experience.	- In High Demand - Unicorn Company - Top School in Europe - Entrepreneur

Academic highlights:

- MBA - MBA Graduate
- Advanced Degree - Advanced Degree Graduate
- PhD - PhD Graduate
- Top US School - Attended one of the top schools in the US
- Top School in Europe - Attended one of the top schools in Europe
- Top School in Asia - Attended one of the top schools in Asia
- Top School in China - Attended one of the top schools in China
- Top School in India - Attended one of the top schools in India
- Top School in Canada - Attended one of the top schools in Canada
- Top US Computer Science Program - Graduated from one of the top Computer Science programs in the US
- Top US Engineering School - Graduated from one of the top engineering schools in the US
- Top US MBA Program - Graduated from one of the top MBA programs in the US
- Top US Med School - Graduated from one of the top med schools in the US
- Top US Law School - Graduated from one of the top law schools in the US

Achievements Highlights:

- Patent Holder - Holds one or more patents
- Published Author - Published in academic, scientific, or other types of publications
- President's Club Award - President's Club Award winner

Activity Highlights:

-  In High Demand - Other recruiters are taking action on this candidate. Reach out before it's too late!
-  Likely to Engage - This candidate has a high engagement rate on Entelo Track. Start a conversation!
-  Most Viewed - This candidate has been viewed multiple times recently

Company Highlights:

-  Fast-Growing Company - Experience at a fast-growing company
-  Non-Profit - Experience working with non-profit organizations
-  Fortune 500 - Experience at one or more Fortune 500 companies
-  Unicorn Company - Experience at a startup valued at over \$1 billion

Diversity & Inclusion Highlights:

-  Volunteer experience - Has volunteer experience
-  Black professional group - Member of a Black professional group
-  Asian professional group - Member of an Asian professional group
-  Hispanic professional group - Member of a Hispanic career network
-  Women professional group - Member of a group for professional women
-  LGBTQ professional group - Member of an LGBTQ professional group
-  Diversity Champion - Has championed D&I initiatives, is a part of a non-profit organization or professional group championing D&I, has attended/hosted D&I conferences or has D&I certifications

Experience Highlights:

-  Rising Star - High promotion rate based on years of experience
-  Years Relevant Experience - Years of experience relevant to the current role
-  Entrepreneurial Experience - Experience as a founder or CEO of a startup
-  Independent Professional Experience - Experience as a consultant or contractor
-  Rare Finds - Candidates that you wouldn't find anywhere else
-  Management Roles - Experience in management roles
-  Security Access - Likely to have special clearance
-  Independent Professional - Currently in a contractor or consultant role

Finance Highlights:

-  General Industry/Products Exams
-  Principal Exams

-  State-level Exams
-  Pending Action - Has a pending or withdrawn FINRA disciplinary action
-  Disciplinary Action - FINRA has taken disciplinary action on this individual

Healthcare Highlights:

-  Medical Specialty - Family Medicine, Sports Medicine, etc
-  Nursing Certifications - RN, LPN, etc
-  Top US Nursing School - Graduated from one of the top US nursing schools
-  Top US Residency Program - Attended a top US residency program
-  High-demand Medical Specialty - This candidate's medical specialty is in high-demand
-  Multiple Medical Specialties - Has multiple medical specialties

Language Highlights:

-  Multilingual - Speaks in more than 1 language
-  Arabic Speaking - Can Speak Arabic
-  Catalan Speaking - Can Speak Catalan
-  Chinese Speaking - Can Speak Chinese
-  Danish Speaking - Can Speak Danish
-  Dutch Speaking - Can Speak Dutch
-  English Speaking - Can Speak English
-  Finnish Speaking - Can Speak Finnish
-  French Speaking - Can Speak French
-  German Speaking - Can Speak German
-  Hindi Speaking - Can Speak Hindi
-  Italian Speaking - Can Speak Italian
-  Norwegian Speaking - Can Speak Norwegian
-  Mandarin Speaking - Can Speak Mandarin
-  Marathi Speaking - Can Speak Marathi
-  Polish Speaking - Can Speak Polish
-  Polyglot - Speaks in more than 4 languages
-  Portuguese Speaking - Can Speak Portuguese
-  Russian Speaking - Can Speak Russian

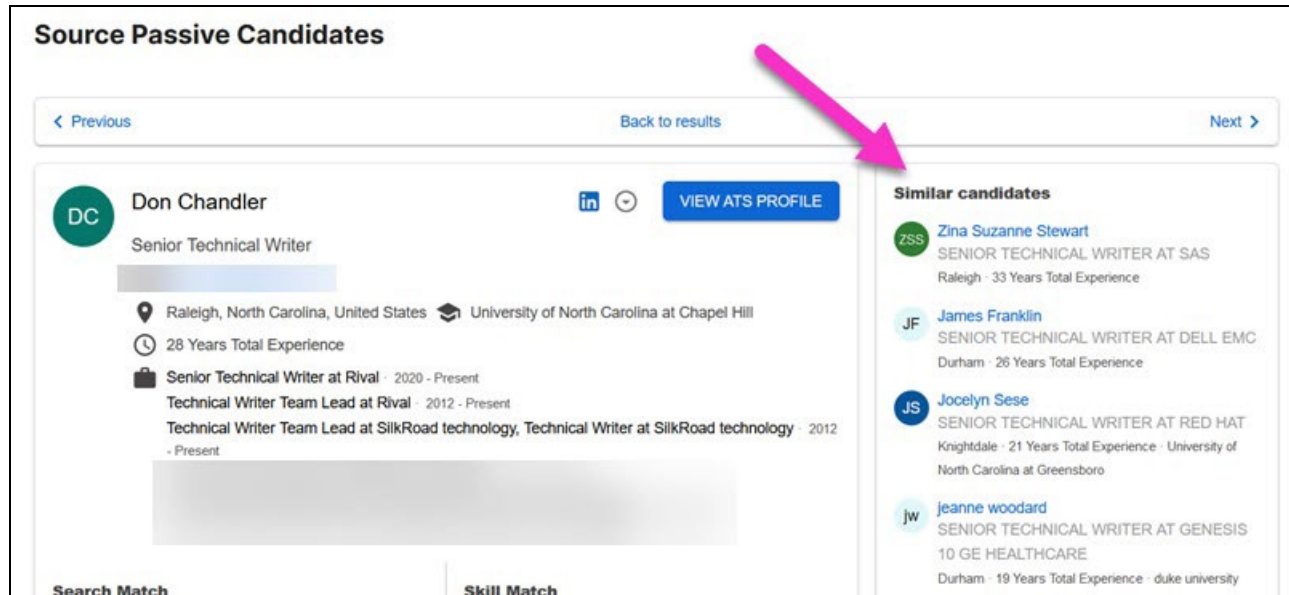
-  Spanish Speaking - Can Speak Spanish
-  Swedish Speaking - Can Speak Swedish
-  Tamil Speaking - Can Speak Tamil
-  Turkish Speaking - Can Speak Turkish
-  Urdu Speaking - Can Speak Urdu

Social Highlights:

- Github Influencer - Popular Github user
- Github Polyglot - Github contributions in more than 6 different programming languages
- Twitter Influencer - Popular Twitter user
- Stack Overflow Guru - High reputation on Stack Overflow
- Github Guru - This candidate has been an active contributor on Github

Similar candidates

Similar candidates show you candidates with similar backgrounds of the profile you are viewing. You'll see avatar or photo, full name, current job title, current company, location, total years of experience, and education. Up to 10 similar candidates are shown. If more than 10 similar candidates are available, the top 10 candidates are shown.



Source Passive Candidates

< Previous Back to results Next >

Don Chandler
Senior Technical Writer
Raleigh, North Carolina, United States University of North Carolina at Chapel Hill
28 Years Total Experience
Senior Technical Writer at Rival · 2020 - Present
Technical Writer Team Lead at Rival · 2012 - Present
Technical Writer Team Lead at SilkRoad technology, Technical Writer at SilkRoad technology · 2012 - Present

Similar candidates

- Zina Suzanne Stewart**
SENIOR TECHNICAL WRITER AT SAS
Raleigh · 33 Years Total Experience
- James Franklin**
SENIOR TECHNICAL WRITER AT DELL EMC
Durham · 26 Years Total Experience
- Jocelyn Sese**
SENIOR TECHNICAL WRITER AT RED HAT
Knightdale · 21 Years Total Experience · University of North Carolina at Greensboro
- jeanne woodard**
SENIOR TECHNICAL WRITER AT GENESIS
10 GE HEALTHCARE
Durham · 19 Years Total Experience · duke university

Search Match Skill Match

Source for passive candidates (open search)

- This topic tells you how to perform an open search. It is not associated to a specific job posting.
 - When searching, it's a good idea starting with a broad search and then narrow it down after you evaluate your talent pool.
 - Alternate method: **Source for passive candidates for a job posting** (on page 113)
1. From the navigation bar, click **Candidates>Source Passive Candidates**.

The **Source Passive Candidate Search tool** (page 101) opens.

2. In the Job Title box:

- Click the **Preferred** drop-down, type a job title and click to select it.

The system generates intelligent suggestions using machine learning and artificial intelligence. To select, click them.

- (Optional) Select the **Current** check box if you want search results only to include people who currently hold the job title(s) you selected.
- (Optional) If you want to exclude job titles from the search, click the **Exclusions** check box, type a job title and click to select it or drag and drop any of the job titles listed in the Preferred list. Do this for each job title you want to exclude.

3. In the Skills box:

- Click the **Preferred** drop-down, type a skill and click to select it.

The system generates intelligent suggestions using machine learning and artificial intelligence. To select, click them.

- (Optional) If you want a skill to be required, click the **Required** check box, type a skill and click to select it or drag and drop any of the skills listed in the Preferred list.
- (Optional) If you want to exclude skills from the search, click the **Exclusions** check box, type a skill and click to select it or drag and drop any of the skills listed in the Preferred list.

Search results appear on the right side of the page. The results are broad so you will likely want to narrow the results by applying additional filters (next step).

4. Use any combination of the following filters and settings to narrow your results.

Location

Sourcing by location is a great way to hone in talent in specific cities, countries, and U.S. states.

City

To include talent based on city, select a city or cities. The *Miles from location* toggle is set to 50 miles. You can change this if you want. You can also add cities, exclude cities (select the **Exclude** check box under the city name to exclude that specific city) or open the search to all cities (select the **Everywhere** check box).

Country

Country defaults to the country set on your My Account ATS profile, but you can change it. To include talent based on country, select a country or countries from the **Country** drop-down. You can also exclude based on country (select the **Exclude** check box under the country name to exclude that specific country).

US State

Note: The U.S. State drop-down only appears if United States has been selected as a country. There is currently no state filter for any other country.

To include talent based on U.S. state, select a state or states from the **US States** drop-down. You can also exclude based on state (select the **Exclude** check box under the state name to exclude that specific state).

Diversity (this filter is available if at least one **diversity type** (see "**Diversity and inclusion settings**" on page 99) is selected)

To source candidates from underrepresented groups, select a diversity type or types.

Education

You can filter profiles by educational degree, school name or country. Make selections from the drop-downs.

Experience

Use the toggles to filter based on years of experience and months at the current job.

Highlights

To filter based on **highlights** (on page 108), select a highlight or highlights.

Industry

To filter by industry, select one or more industries.

As you select filters and settings, search results change and become more narrow and focused.

Source for passive candidates for a job posting

- This topic tells you how to search for passive candidates for a specific job posting.
 - Alternate method: **Source for passive candidates (open search)** (on page 111).
1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. For the job you want to source, click either the internal or posted job title link.

The Job Posting Details page opens.

4. Click **Source Passive Candidates**.

The **Source Passive Candidate Search tool** (page 101) opens.

The Job Title filter is prepopulated with the job posting job title.

The Skills filter is prepopulated with the list of skills extracted by the system from the job description and anything entered in the Required Skills field.

The Location filter is prepopulated with the location from the job posting and within 50 miles.

The candidate profile results appear on the right side of the page.

Tip: You can adjust these prepopulated filters. You can edit the Job Title filter, add or remove skills from the Skills filter, and edit the Location filter.

5. Use any combination of the following filters to narrow the results even further.

Diversity (this filter is available if at least one **diversity type** (see "**Diversity and inclusion settings**" on page 99) is selected)

To source candidates from underrepresented groups, select a diversity type or types.

Education

You can filter profiles by educational degree, school name or country. Make selections from the drop-downs.

Experience

Use the toggles to filter based on years of experience and months at the current job.

Highlights

To filter based on **highlights** (on page 108), select a highlight or highlights.

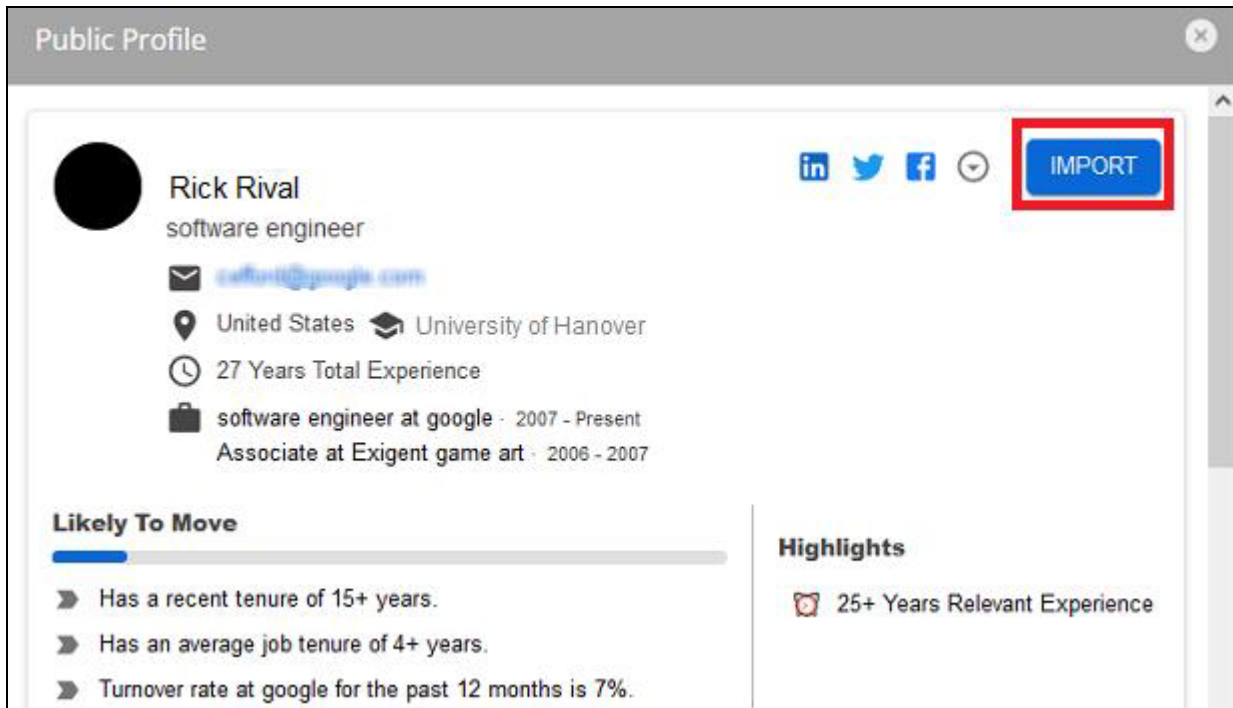
Industry

To filter by industry, select one or more industries.

Import a passive candidate into Rival Recruit

- Alternate method: **Import multiple passive candidates in bulk** (see "**Import multiple passive candidates into Rival Recruit (bulk import)**" on page 115).
1. Source the candidate using an **open search** (see "**Source for passive candidates (open search)**" on page 111) or for a **specific job posting** (see "**Source for passive candidates for a job posting**" on page 113).

2. On their profile, click **Import**.



The profile is imported into Rival Recruit with a source status of Passive Candidate Search.

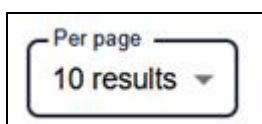
If the profile was imported for a specific job posting, it is associated with that job posting. If the profile was imported by an open search, it is not associated to a job and is essentially an open submission.

Tip: You can **search** (see "**Search for a candidate**" on page 120) for all imported profiles using Advanced Search by selecting **Passive Candidate Search** in the Source filter.

Tip: Use **tags** (on page 143) to group imported profiles so you can easily find them later.

Import multiple passive candidates into Rival Recruit (bulk import)

- You can bulk import up to 50 candidate profiles into Rival Recruit at one time.
1. Source the candidates using an **open search** (see "**Source for passive candidates (open search)**" on page 111).
 2. Scroll to the bottom of the page and set the number of profiles to show per page. Options are 10, 20, or 50.

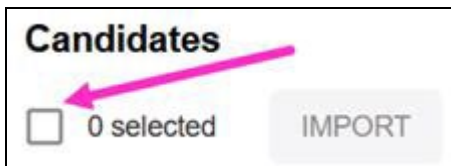


3. To import:

- Multiple candidate profiles, select the check box beside each of the profiles:



- All of the candidate profiles shown on the page that have not been previously imported, select the check box at the top of the candidates list:



4. Click **Import**.

The profiles are imported into Rival Recruit with a source status of Passive Candidate Search.

Tip: You can **search** (see "**Search for a candidate**" on page 120) for all imported profiles using Advanced Search by selecting **Passive Candidate Search** in the Source filter.

Tip: Use **tags** (on page 143) to group imported profiles so you can easily find them later.

View a list of passive candidate profiles imported today

- From the navigation bar, click **Candidates>Source Passive Candidates**.

The **Source Passive Candidate Search tool** (page 101) opens.

- Click **⋮** and click **View Today's Imported Profiles**.

Candidates

In this section

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Searching for candidates (resumes)

Candidate search

Searching for candidates in Rival Recruit is a task you do often. Rival Recruit has flexible search options to make searching easy. **Boolean** (see "**Boolean search**" on page 119) search logic is supported.

Search option	Description
Quick search	Quick search is a fast way to find a candidate. In the header at the top of a page, toggle the quick search bar to Candidates . Then type a candidate's name and press Enter .
Advanced Search	Use filters, keywords, Boolean search logic to find what you are looking for.
Basic search	Basic searches are default system searches. There are two: ▶ Resumes: All candidates (that you have access to) entered in the last 90 days ▶ Today's Resumes: New candidates entered for present day Basic searches are available from the Candidate Pool page.
My searches	My searches are searches that you created and saved. My searches are available from the Candidate Pool page.
Recent searches	Recent searches are your last 10 most recent searches—excluding basic and your saved My search searches. Recent searches are available from the Candidate Pool page.

Filters

 **Hide Filters**

Keywords

Boolean search

When searching for candidates, you can use Boolean searches. Boolean searches allow you to combine words and phrases using the words AND, OR, NOT, quotation marks, wild card (*), and parentheses (known as Boolean operators) to limit, broaden, or define your search. Boolean search strings help you weed out irrelevant results and land on qualified resumes and profiles.

Key info

- The Keywords text box supports full Boolean searching.
- The Boolean operator AND narrows a search.
- The Boolean operator OR broadens a search.
- The Boolean operator NOT excludes words from a search.
- For best results, manually type quotes into search box and do not copy/paste text from other applications.

Examples

Operators	How it works	Search criteria	Results
Quotes	Quotation marks ensure search results carry the words in the specific order you entered and are recognized as a single word. If you would like to search for an exact phrase, enclose the phrase in quotation marks. You can use these in addition to other operators/modifiers.	▶ "product manager" ▶ "account representative" ▶ "executive assistant"	Resumes that contain exact phrase, product manager, account representative, or executive assistant
Or	Broaden the search by using the uppercase word OR. Search resumes that include any of these four words. It can be one of them, all of them, or anything in between. Use OR to separate the words and phrases. Use quotation marks for phrases or multiple words.	▶ Recruiter OR Recruitment OR Recruiting OR Recruit ▶ "Account Executive" OR "Account Exec" OR "Account Manager" OR "Sales Executive"	Resumes that contain any string of words and phrases used such as Recruit or Account Executive, etc.
Wildcard	The * (asterisk) is a wildcard character. Resumes that contain words that start with Recruit.	▶ Recruit*	Resumes that contain Recruiter, or Recruitment, or Recruiting
AND	Narrow the search by using the word AND. Use quotations marks for phrases or multiple words.	▶ Recruiter AND "Human Resources" ▶ "customer service" AND hospitality	Resumes that contain the exact word or phrase Recruiter and Human Resources

Operators	How it works	Search criteria	Results
NOT	Narrow the search by using the word NOT. The search results exclude specific keywords or phrases.	▶ Recruiter AND NOT Consultant ▶ Director NOT executive NOT vp NOT "Vice President"	Resumes that contain the word Recruiter and exclude resumes that contain the word Consultant
Parentheses	Parentheses are used to separate phrases using the OR operator from the words or phrases using the AND operator. If you would like to do a complex search you can combine terms and modifiers.	▶ Software AND (engineer OR architect) ▶ ("human resources" OR HR) AND "customer service"	Resumes that contain both software engineers and software architects
AND + OR Space	Narrow the search by using the words AND plus OR that contain the word Recruiter as well as the exact phrase Human Resource OR the acronym HR, or both. The space in between the two acts like the Boolean operator AND.	▶ Recruiter AND ("Human Resources" OR HR) ▶ Recruiter HR	Resumes that contain both Recruiter AND Human Resources OR HR
Advanced	This is an example of a more complicated search string.	▶ Recruit* AND (HR OR "Human Resources") AND (Pipeline OR "Talent Pool" OR Sourcing) AND ("C-Level Jobs" OR "Executive Search") AND NOT (Hourly OR "Part-Time") AND Bachelors	Resumes that start with Recruit and include HR, Human Resources, Pipeline, Talent Pool, Sourcing, C-Level Jobs, Executive Search, Bachelors but exclude resumes that have Hourly or Part-Time

Search for a candidate (quick search)

1. From the header, toggle the search box to **Candidates**.
2. Enter a candidate's name and press **Enter**.

The Candidate Pool page opens.

If the system found a match, the candidate is shown in the search results grid.

Search for a candidate

1. From the navigation bar, click **Candidates>Candidate Pool**.
The Candidate Pool page opens.
2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

Filter out candidates who have been hired or otherwise disqualified

- When searching for candidates, you can filter out candidates who have been hired or otherwise disqualified.
- This is useful if you want to see candidates in stages prior to the Hired stage.
- This feature is only available if it is enabled in the Resume Search setting.

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click **Edit Search** to display filters.
3. From the Current Stage Range drop-down, click **Stages before the Hired stage**.

Tip: If you customized your hiring stages during implementation, your Hired stage may have a different name. In this case, the filter option will be different in step 3.

4. Click **Apply Filters**.
5. Search results appear in the data grid.

Create a default search for candidates

- You can save a candidate search to use as the default search.
- After saving it, you can select it from the My Searches list.

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

5. Click  and then click **Save Search As**.
6. On the pop-up, name this search.
7. Select (check) the **Make Default** check box.
8. Click **Save**.

Create a default quick search for candidates

- The quick search is the search box at the top of a page.
- You can save a candidate search to use as the default quick search.
- After saving it, you can select it from the My Searches list.

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

5. Click  and then click **Save Search As**.
6. On the pop-up, name this search.
7. Select (check) the **Make Quick Search Default** check box.
8. Click **Save**.

Create a default resume count search for candidates

- You can save a candidate search to use as the default resume count search.
- After saving it, you can select it from the My Searches list.

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

5. Click  and then click **Save Search As**.
6. On the pop-up, name this search.
7. Select (check) the **Make Resume Count Default** check box.
8. Click **Save**.

Export candidate search results to a Microsoft Excel file

- If you have the Export Resume Search Results permission, you can export candidate search results.
- If search results have more than 500 results, only a maximum of 500 results are exported.

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

Tip: Only the columns shown on the page are eligible to be exported. If you want additional or different columns exported, add them before exporting.

5. Click  and then click **Export Search Results**.

6. On the confirmation pop-up, click **Download**.
7. On the Save File pop-up, open the file in Microsoft Excel or save the file to your computer.

Search for a candidate using a saved search

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **My Searches**.
3. Click the search you want.
4. Click **Close**.

Results are listed in the data grid.

Make a saved candidate search the default quick search

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click **Quick Search Default**.
4. Click **Save**.

Make a saved candidate search the default search

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click **Default**.
4. Click **Save**.

Make a saved candidate search the default resume count search

- This saved search default is used on the Jobs page when you click the Resumes column in results grid.

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click **Resume Count Default**.
4. Click **Save**.

Delete a saved candidate search

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **Manage my searches**.
3. Beside a saved search, click the **Delete** check box.
4. Click **Save**.

Search for all resumes entered in the last 90 days (basic search)

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **Basic Searches**.
3. Click **Resumes**.

All resumes (that you have access to) entered in the last 90 days are listed in the data grid.

Search for all resumes entered today (basic search)

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **Basic Searches**.
3. Click **Today's Resumes**.

All resumes entered today are listed in the data grid.

Search for candidates using a recent search

- Recent searches are your last 10 most recent searches—excluding basic and your saved My search searches

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click  and then click **Recent Searches**.
3. Click the search you want.

Results are listed in the data grid.

Add columns for candidate search results

- You can add columns to customize search results to meet your needs.

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click .
3. In the Available Columns list, click columns to move them to Selected Columns.

Tip: To change the order of selected columns, drag and drop them into the order you want.

4. Click **Apply**.

Remove columns from candidate search results

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click .
3. In the Selected Columns list, click **X** for the column you want to remove.
4. Click **Apply**.

View a candidate's resume

1. Perform a **quick search** (see "[Search for a candidate \(quick search\)](#)" on page 120) or **search for a candidate** (on page 120).
2. In the Candidate column, click .

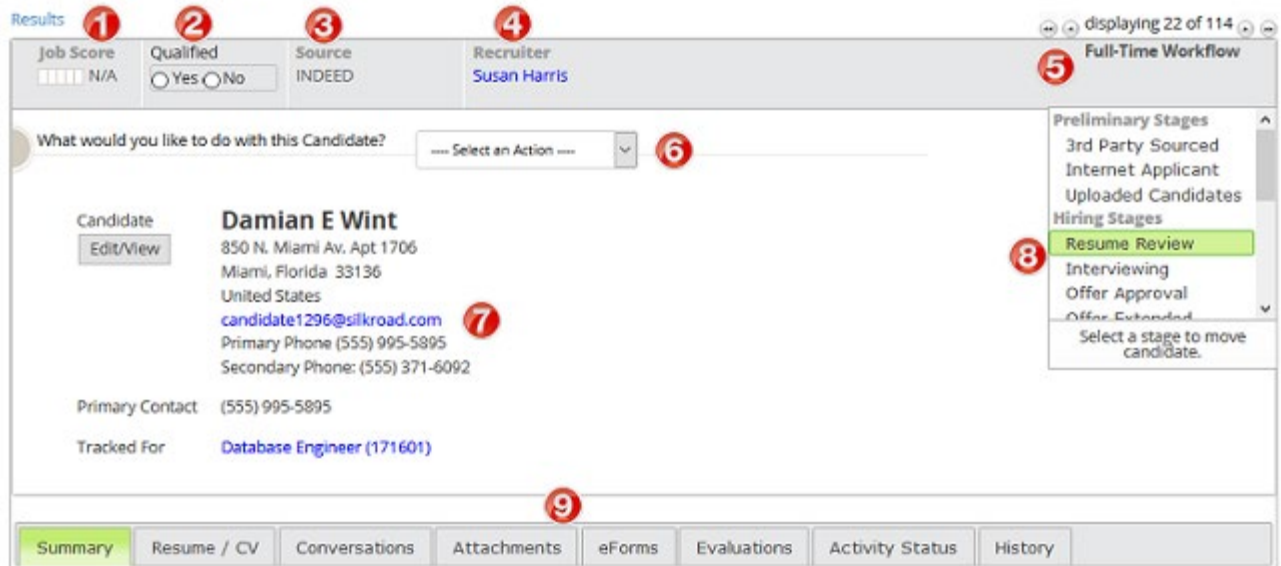
Candidate profile

The candidate profile contains everything important about a candidate. It is your go-to place to view, assess, and move a candidate through the candidate/job evaluation process.

You can access a candidate profile from several pages in Rival Recruit. Generally, a candidate's name link opens the candidate profile.

Let's look at some key parts of a candidate profile.

Candidate Resume Profile



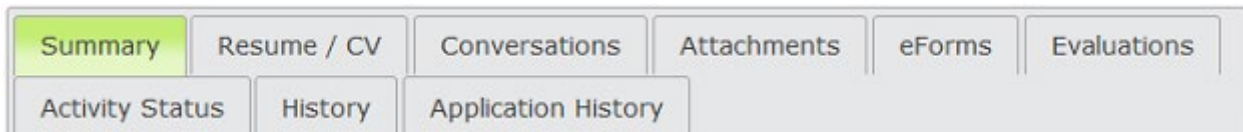
The screenshot shows the 'Candidate Resume Profile' page for Damian E Wint. Numbered callouts highlight the following elements:

- 1: Results tab
- 2: Job Score field (N/A)
- 3: Qualified field (Yes/No)
- 4: Source field (INDEED)
- 5: Recruiter field (Susan Harris)
- 6: 'What would you like to do with this Candidate?' dropdown menu
- 7: Candidate contact information (Email: candidate1296@silkrad.com)
- 8: 'Preliminary Stages' dropdown menu (Resume Review is selected)
- 9: Summary tab in the bottom navigation bar

	Name	Description
1	Job Score	Displays job score (see " Hot match and job score " on page 95) (if available), which is how closely candidate matches the tracked job.
2	Qualified	Indicates whether an applicant is qualified or not qualified based on OFCCP reporting standards. Qualified is used for internal tracking purposes. It is useful for clients who

	Name	Description
		must remain compliant with OFCCP reporting standards for qualified/not qualified applicants in the United States and for clients who engage in government contracts.
3	Source	Displays the source of the candidate's resume.
4	Recruiter	Displays the recruiter associated (if available) with this candidate/job.
5	Navigation icons	Move forward or backward to scroll through candidate profiles.
6	Action list	Perform actions like add a comment, correspond with candidate, schedule an interview, and more. Available actions depend on candidate's hiring stage.
7	Candidate information	Shows candidate information. Click Edit/View to change candidate information. Blue text are active links. If a candidate is an internal candidate,  appears beside their name. If a candidate is a U.S. military veteran and the veteran icon is enabled in your system (see " Turn on the veteran icon " on page 222),  appears beside their name.
8	Stages	Move a candidate through hiring stages. Current hiring stage is highlighted.
9	Tabs	Shows detailed information like resume, attachments, eForms, evaluations, and more.

Tabs



The lower section of the Candidate Profile page shows detailed candidate data.

Tab	Description
Summary	Shows details about the candidate's education, availability, employment preferences, and general eligibility. This is information generally collected from candidates when they apply directly through a customer's external or internal career site. Click Edit to enter or change data.

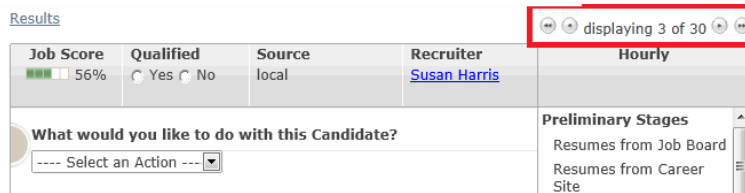
Tab	Description
Resume/CV	Contains a Resume/CV data field. Whether the candidate submitted a resume to your organization directly or sourced by a recruiter, the resume is parsed into this field. All searches conducted for candidates are run against this data field. Successful search hits are highlighted in yellow. Click Edit to update the content of this field. Resumes created by a candidate or uploaded by a recruiter are stored separately in the Attachments tab. Any updates to the Resume/CV field do not affect a resume file attachment. Only the data in the Resume/CV tab is updated. Note: Updating the resume and saving refreshes the candidate's job score.
Conversations	(If you use the texting feature) Shows text message conversations with the candidate.
Attachments	Contains files that recruiters attached to a candidate record. Resumes created by the candidate during initial submission or by a recruiter while importing a candidate are also stored here. Click Attach a File to upload a file as an attachment to the candidate profile. Supported file types are avi, bmp, csv, doc, docx, gif, htm, html, jpeg, jpg, mp3, mpg, mpeg, odf, odg, odp, ods, odt, pdf, png, pps, ppt, pptx, rtf, sxw, txt, wmv, xls, xlsx. Max size is 10 MB. When an attachment is added, whether manually or through the application process, a date and time stamp are added. Attached files can be hidden from non-recruiter users by de-selecting the check box indicating that non-Recruiter users can view the file. The box is checked by default so that any attached file can be viewed by any user with access to the candidate's profile. Click Delete to delete an attached file or Replace to replace one.
eForms	If candidate has eForms attached, they are available here.

Tab	Description
Evaluations	Contains the candidate's Evaluation Ranking Criteria score and questions, answers, and scores associated with the evaluation questions pre-screening. Click Edit Evaluations to view candidate Ranking Criteria Score details. The Evaluation Score provides a percentile grade indicating how a candidate responded to yes/no and multiple-choice questions. The Failed Evaluation Question displays a Yes if the candidate provided an answer that disqualifies him or her from being considered. A No is displayed if all responses are in line with acceptable answers to questions. N/A is displayed if the position does not have any associated questions or the candidate came from a source where questions were not presented (for example, a manually imported candidate profile). The Evaluations tab also allows a recruiter, who is screening a candidate, to respond to any questions defined in the Recruiter Screening section. Expand the section to display any questions related to candidate screening. Press Submit Answers to provide answers. Responses to screening questions collected from a direct resume submission and collected by interviewers are visible in the Job Related and Interview sections of the Evaluations tab.
Activity Status	Tracks activities that are conducted outside of Rival Recruit. When an activity is started, a check can be placed into the check box indicating the activity is initiated. The date the activity started can also be entered. Upon completion of the activity, the <i>Date Completed</i> can be logged. If an activity is suspended, the dates can be cleared and the Initiate/Uninitiated check box is de-selected.
History	Displays a complete audit trail of actions and updates performed to the candidate record. Includes creator (user or system), description, date, and time stamp. Also shows any comments, resume reviews, and interview feedback. Click  to filter to show only events, show only comments, show all (both events and comments). Click  and then click Add Comments to add comments to the candidate profile.
Application History	Displays a list of jobs the applicant applied to. It is a full history. Columns are sortable.

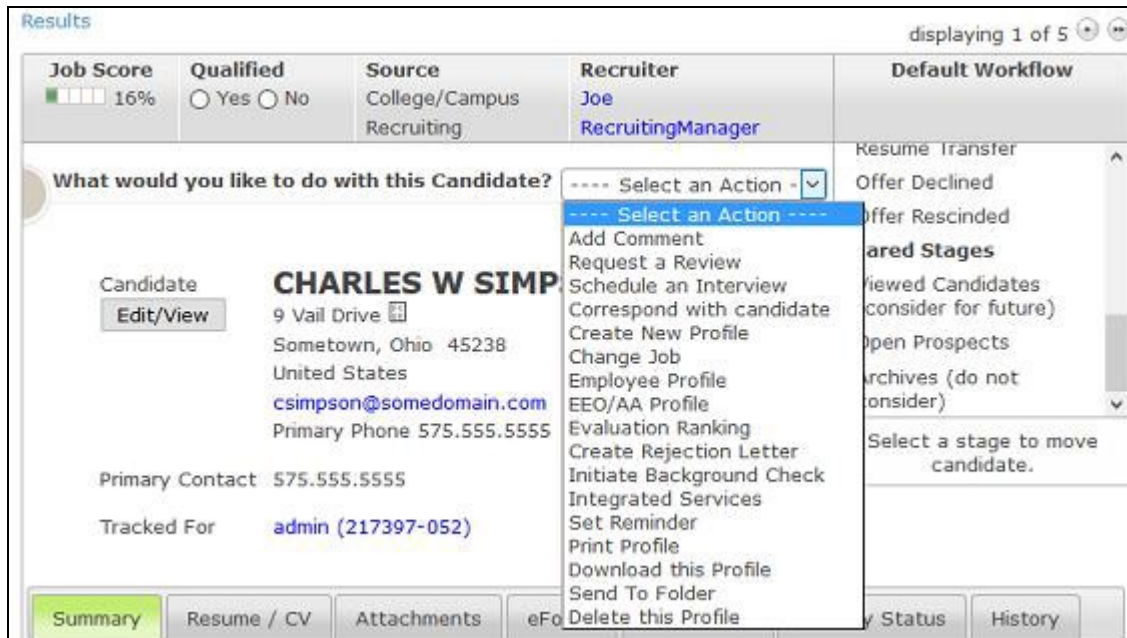
Scroll through resumes on candidate profile

1. Access a candidate's candidate profile.

- Click the navigation icons to scroll forward or backward through candidate profiles.



Candidate profile action menu



Use the Action menu to add a comment, send email to a candidate, schedule an interview, and more. Available options depend on a candidate's hiring stage.

Launch Recruiter Lobby from candidate profile

- This option is only available if Recruiter Lobby is configured and you have Rival Onboard.

- Access a candidate's candidate profile.
- From the Select an action list, select **Launch Recruiter Lobby**.

The Launch Recruiter Lobby window opens.

- Click **Close**.

Add comments to a profile

Note: This topic shows you how to add comments to an individual candidate profile. To add comments to multiple candidate profiles, see **Add comments to multiple candidates (bulk action)** (see "Add comments to multiple candidate profiles (bulk action)" on page 139).

Method 1: From the Select an action drop-down list

- From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. In the Candidate column, click to open the candidate's profile.

The candidate profile opens.

5. From the **Select an action** drop-down list, click **Add Comment**.

The Candidate Profile Comment window opens.

6. Enter a comment in the text area.

Tip: To hide comments from non-recruiter users, select the **Visible to Recruiter users only** check box. All recruiters can see each other's comments. Hiring managers can only see comments that were not marked for recruiters only.

7. Click **Save**.

Your comments are saved and the comment window closes. Comments are visible in the History tab of a candidate's profile.

Method 2: From the History tab on the Candidate profile

1. On the candidate profile, click the History tab.
2. Click  and select **Add Comment**.
3. Enter a comment in the text area.

Tip: To hide comments from non-recruiter users, select the **Visible to Recruiter users only** check box. All recruiters can see each other's comments. Hiring managers can only see comments that were not marked for recruiters only.

4. Click **Save**.

Your comments are saved and the comment window closes. Comments are visible in the History tab of a candidate's profile.

Request a review

- Candidate profiles can be forwarded to recipients whether they use Rival Recruit or not.
- Recipients with Rival Recruit access can log in to their account to perform candidate reviews and have their feedback tracked automatically.
- Recipients without access to Rival Recruit account receive and respond to emailed resumes outside of Rival Recruit. Their feedback is not tracked automatically.

1. From the **Select an action** drop-down list, select **Request a Review**.

The Request a Review page opens.

2. Make sure to include a message subject line.
3. Select the Available Internal Recipient(s).

Tip: Maximum of 50 internal recipients can be selected. Recruiting Team groups can be searched and selected to quickly populate a group of reviewers.

4. Enter the email address for external recipient(s) and Cc and/or Bcc recipients.
5. Make any changes to the default email message.
6. Click **Send Email**.
7. From the Hiring Stage list, select **Resume Review**.
8. Click **Select a stage** to move candidate.

Schedule an interview

Note: Using this action, you can schedule interviews with candidates. Rival Recruit has two methods for creating interviews. One is to schedule the appointment and conduct the interview using Rival Recruit and the other allows the recruiter to enter the details of an interview that has been performed outside of the system.

1. From the **Select an action** drop-down list, click **Schedule an interview**.
2. From the Hiring Stage list, select **Interviewing**.
3. Click **Select a stage** to move candidate.

Send email

Note: Use this action to send an email message to a candidate directly through Rival Recruit. Email content is tracked in the candidate's History tab. Additionally, email templates can be configured with merge fields to customize the email.

1. From the **Select an action** drop-down list, click **Send**.
2. Create the email.
3. Click **Send Email**.

Create a new profile

- Use the Create New Profile action to create another instance of a candidate's profile so you can track the candidate for more than one position at the same time.
- All attachments associated with the profile are copied to the new profile unless you uncheck them individually.

1. From the **Select an action** drop-down list, click **Create New Profile**.
The Create New Profile page opens.
2. From the Associate with Job Posting drop-down list, select a job posting to track the candidate for.
3. From the Available Hiring Stages drop-down list, select a hiring stage.
4. De-select (uncheck) any attachment that you do *not* want copied to the new profile.
5. Click **Save**.

Note: Use the Tracked For drop-down list to view the candidate's alternate profile.

Change a candidate to a different job

1. From the **Select an action** drop-down list, click **Change Job**.

The Move Resume page opens.

2. From the Associate With Job Posting drop-down list, select a job posting to reassign the candidate to.
3. From the Available Hiring Stages drop-down list, select a new hiring stage.
4. Click **Save**.

Note: If the candidate is moved into a new job with a different hiring workflow, their current stage may not be listed for that hiring workflow. Only the hiring stages available for that specific workflow are listed in the drop-down list. The candidate will remain in their current hiring stage; however, the stage may not be listed in the stages drop-down.

View or update employee profile (My Account)

Tip: If a candidate is already a member of your organization, then selecting the Employee Profile action allows you to view or update information in the employee's profile.

1. From the **Select an action** drop-down list, click **Employee Profile**.

The employee's information appears.

2. View or make changes or both.

Access a candidate's EEO/AA profile

- This feature is available for designated system users to have access to a candidate's specific EEO/OFCCP information.
- You can lock down the view of EEO/AA profile information to select users by contacting Support. Based on recent OFCCP regulations, you should only make EEO/AA information available to select team members.

1. From the **Select an action** drop-down list, click **EEO/AA Profile**.

The EEO/AA Profile definition window opens.

2. Click the link to view and print the voluntary self-identification disability forms.

Evaluate (rank) a candidate

- Ranking criteria are used to provide general feedback about a candidate's ability to perform for your organization and scored on a 1 to 5 scale.
- Ranking criteria are general (not job specific). If you provide ranking criteria feedback during the candidate review process, you can edit your ranking criteria feedback at any time. Ranking criteria is defined by the Rival Recruit administrator.

1. From the **Select an Action** drop-down list, click **Evaluation Ranking**.

The Evaluation Rankings window opens.

2. For each respective ranking, select the ranking value from the following options:

- **Excellent** – worth 5 points
- **Good** – worth 4 points
- **Average** – worth 3 points
- **Below Average** – worth 2 points
- **Poor** – worth 1 point

3. Enter comments beneath each criterion to further elaborate on the ranking selection.

Note: All possible criteria do not need to be acknowledged. You can choose to only select criteria that pertain to a specific instance.

4. Click **Modify** to store the values and calculate the ranking score. The system calculates the average of all the selected values. If multiple users have ranked a candidate, the system incorporates those numbers into the calculation. The Ranking Score is visible in the Evaluations tab of the candidate profile screen.

CQE & Ranking Criteria	
Ranking Criteria Score (scale 0 to 5)	4.27
CQE Evaluation Score (weighted)	
Failed CQE Question (at least 1)	N/A

Create rejection letter

- Formal rejection letters (designed to be physically mailed to candidates) can be generated for a candidate at any time. The Rejection letter template must first be created by an Administrator to use this feature.

1. From the **Select an action** drop-down list, click **Create Rejection Letter**.

The Select Rejection Letter page opens.

All rejection letters currently on file are listed. To preview the contents of any letter, click the rejection template name link.

2. Select the radio button of the rejection letter you wish to create and then click **Generate Letter**.

A new window opens. You can download and save the letter to your desktop or print from your web browser menu.

3. The downloaded rejection letter can be updated and stored for retrieval later using the Browse and Upload buttons on the Rejection Letter options screen.
4. Click **Email Letter** and optionally choose to include Rival Recruit Recipients and/or Bcc External Recipients.
5. Enter a Subject for the email and the message content.
6. Click **Send Email**.

The rejection letter is sent to the candidate and all listed recipients.

Create offer letter

- Offer letters can only be created when a candidate is in an offer related hiring stage. The offer letter template must first be created by an administrator to use this feature.

1. From the **Select an action** drop-down list, click **Create Offer Letter**.

The Select Offer Letter page opens.

All offer letters currently on file are listed. To preview the contents of any letter, click on the offer template name link.

2. Select the radio button of the offer letter you wish to create, then click **Generate Letter**.

The offer letter is now automatically saved to the candidate's profile Attachments tab. If edits are needed, the user can download the letter to their pc and the original letter is still retained on the candidate profile Attachments tab.

3. The File Download window opens.

Tip: You can download and save the letter to your desktop or print from your web browser menu.

4. The downloaded offer letter can be updated and stored for retrieval later using the Browse and Upload buttons on the Offer Letter options screen.
5. Click **Email Letter** and optionally choose to include Rival Recruit Recipients and/or Bcc External Recipients.
6. Enter a Subject for the email and the message content.
7. Optionally you may select to attach up to 3 additional files to your message. (10MB total)
8. Click **Send Email**.

The offer letter is sent to the candidate and all listed recipients.

Initiate assessment request

1. From the **Select an action** drop-down list, click **Initiate Assessment Request**.

The Assessment Request window opens.

2. Click **Continue**.

Set a reminder

- Use the Set Reminder feature to create an event reminder that is synced with your Microsoft Outlook calendar.

1. From the **Select an action** drop-down list, select **Set Reminder**.

The Event Reminder window opens so you can enter the event information.

- Enter the Date using the calendar picker.
- Select the Time using the drop-down list.
- Enter the event reminder Summary.
- Optionally enter an event reminder description.

2. Click **Submit**.

The Event Reminder details are saved in Rival Recruit History tab. A pop-up window displays so you can download and sync the reminder with your Microsoft Outlook calendar.

Print profile

- From the **Select an action** drop-down list, select **Print Profile**.

The printed profile includes data from the:

- Top portion of the candidate's profile
- Candidate's resume/CV
- History of events and comments
- Evaluation and ranking scores
- Evaluation questions and candidate's responses

Download a profile

- From the Select an action drop-down list, select **Download this Profile**.

The candidate profile is downloaded to your local computer in HTML file format.

Note: Rival Recruit does not track any actions taken on a downloaded file.

Delete a profile

- Deleting a profile moves it to the recycle bin and moves it out of view for consideration.
 - Use the delete function sparingly such as when a profile is not a viable record (spam or fictitious submission).
 - If you want to disable this delete function, your Rival Recruit administrator can contact Rival Support to turned it off.
1. From the Select an action drop-down list, select **Delete this Profile**.
 2. On the confirmation pop-up, click **Yes**.

Tip: If you accidentally delete a candidate profile, you can **restore** (see "**Restore candidates from the recycle bin**" on page 141) it.

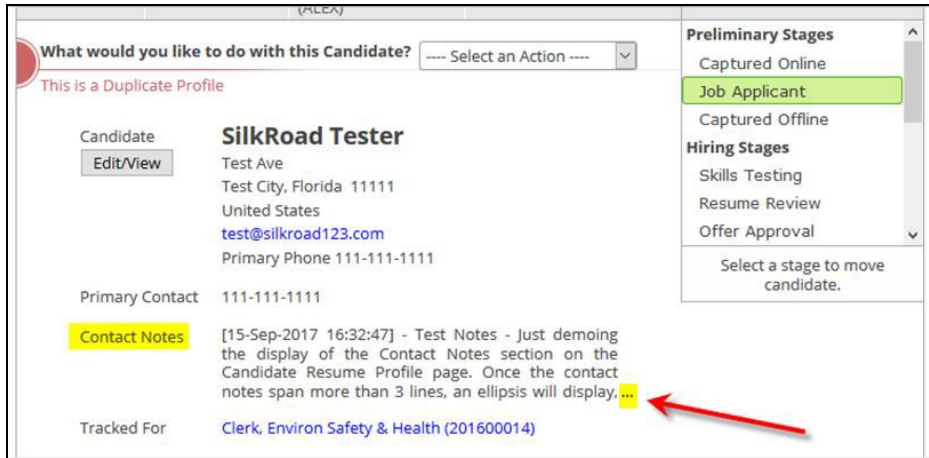
Change a candidate's disposition (from action menu)

- Dispositions indicate why a candidate is not being selected for a job posting and are used for reporting purposes.
 - You must have the Disposition Candidate permission to change a candidate's disposition from the action menu. Recruiting managers and admins can add this permission for hiring managers.
1. From the **Select an action** drop-down list, select **Change Disposition**.
 2. On the Change Disposition pop-up, select a reason.
 3. Click **Save**.

Remove a candidate's disposition (from action menu)

- Dispositions indicate why a candidate is not being selected for a job posting and are used for reporting purposes.
 - You must have the Remove Disposition permission to remove a disposition from a candidate.
 - Alternate method: Do it from the **Resumes page** (see "**Remove a candidate's disposition**" on page 151).
1. From the **Select an action** drop-down list, select **Remove Disposition**.
 2. On the Remove Disposition pop-up, click **OK**.

Add Contact Notes



What would you like to do with this Candidate? ---- Select an Action ----

This is a Duplicate Profile

Candidate
[Edit/View](#)
SilkRoad Tester
 Test Ave
 Test City, Florida 11111
 United States
test@silkroad123.com
 Primary Phone 111-111-1111

Primary Contact 111-111-1111

Contact Notes [15-Sep-2017 16:32:47] - Test Notes - just demoing the display of the Contact Notes section on the Candidate Resume Profile page. Once the contact notes span more than 3 lines, an ellipsis will display, ...

Tracked For [Clerk, Environ Safety & Health \(201600014\)](#)

Preliminary Stages
 Captured Online
Job Applicant
 Captured Offline

Hiring Stages
 Skills Testing
 Resume Review
 Offer Approval

Select a stage to move candidate.

Use Contact Notes to share notes about candidates across all jobs—regardless of resume history, job status, or workflow stage. They always remain on the Candidate Profile, similar to Contact information, but give you more flexibility for recording specific candidate notes for the internal organization.

You can use Contact Notes any way you want. They are ideal for the internal organization and commentary that applies to all jobs such as "Needs Relocation," "Do Not Hire", or "Available for Contract."

Contact Notes are not related to a specific job like Comments in History. (You can still add Comments in the Candidate's History detailing information for a specific job.)

1. Navigate to a candidate's Candidate Resume Profile page.
2. Click **Edit/View**.
3. Add information in Contact Notes.

The information entered is available to all users who have access to the Candidate Profile page.

Tip: Keep your notes short. If you exceed the character limit, an ellipsis appears, which lets you view the entire note.

4. Click **Save**.

After notes are added and the page refreshes, the notes and a date/time stamp are shown. The date/time stamp note is not localized. It displays for all users in the following format: dd-MMM-yyyy hh:mm:ss. The time is displayed in the 24-hour format.

Note: Each time you edit Contact Notes, a date/time stamp is added. You can always remove the date/time stamps you don't want.

Candidates

In this section

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Hiring stages

The following is a list of the default hiring stages in Rival Recruit.

Note: Any stage can be renamed and stages can be added or removed from the default configuration (within technical limitations). Your default hiring workflow configuration may vary from what's shown below. You may also have one or more custom hiring workflows. Consult your Rival Recruit customer administrator for more information about company-specific hiring stage information.

Hiring stage	Description
Captured Online	Any candidates captured from an online source such as an online job board and are associated with a job posting during the capture process. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Job Applicant	Any candidates that applied to a job posting at the Rival Recruit-hosted external, internal, or third-party board. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Captured Offline	Any candidates captured from a recruiter's local PC or network, using the Upload Candidate tool and associated with a job posting during the capture process but not flagged with a specific source. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Resume Review	Candidates who are being reviewed for an open position. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Interviewing	Candidates whom a recruiter or hiring manager is currently in contact with and screening or interviewing. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.

Hiring stage	Description
Pre-employment Screening	Candidates have gone through the interview process and need pre-employment screening such as a background check or assessment testing prior to formally extending an offer. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Offer Approval	Candidates to whom an offer will be extended, but the offer is being reviewed by Hiring Manager or other company officers. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Offer Extended	Candidates who have been extended and have accepted employment offers, but whose new hire paperwork has not been processed. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Hired	Candidates who have accepted the offer and are now employees of the company.
Offer Declined	Candidates who have declined an offer of employment from the company. When a candidate is moved into this stage, all information associated with their original offer is reset. Moving the candidate back into an earlier Offer stage will allow a Recruiter to build and extend a new offer. These candidates are placed in the Shared Hiring Stage called "Talent Pool (consider for future)" when the job is closed.
Talent Pool (consider for future)	Candidates that were rejected for a specific position but may be considered for future positions. When a job is closed, all associated candidates except the person hired go to this stage automatically. For this reason, it is important for a recruiter to properly manage the candidates associated with a job before closing a job. If a candidate is not being considered for a position, a recruiter can manually move a candidate to this shared stage and make the candidate available for other recruiters to consider for their own open opportunities. This is a shared stage.
Open Prospects	Candidates who have submitted a resume through your web site for general consideration but are not indicating interest in a specific job posting. Any candidates uploaded by a recruiter without a job association will also be found here. This is a shared stage.
Archives (do not consider)	Candidates who were rejected for a specific position and prefer not to be considered for future positions. This is a shared stage.

Note: Your Rival Recruit customer administrator can contact Rival Support to prevent candidates from automatically being moved to the "Talent Pool (consider for future)" folder after a job has closed.

Move a candidate through hiring stages

- You must have the appropriate **role** (see "**Set available hiring stages by role**" on page 220) and **user permission** (see "**Assign user permission to change hiring stage**" on page 231) to move candidates through hiring stages.
- A candidate's current hiring stage is highlighted in green.

1. Access a candidate's candidate profile.
2. In the Hiring stages box, select a hiring stage.
3. Click **Select a stage** to move candidate.

Add comments to multiple candidate profiles (bulk action)

- Up to 25 profiles can have comments added at one time.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidates you want to add comments to.
5. From the Take Action list, select **Add Comment** and click .

The Candidate Profile Comment window opens.

6. Enter a comment in the text area.

Tip: To hide comments from non-recruiter users, select the **Visible to Recruiter users only** check box. All recruiters can see each other's comments. Hiring managers can only see comments that were not marked for recruiters only.

7. Click **Continue**.

Your comments are saved and the comment window closes. Comments are visible in the History tab of a candidate's profile.

Uploading candidates

Use Candidate Upload to import candidates from a local or networked drive.

Key info

- A candidate's resume must be in a folder on a drive that is accessible from the user's local computer.
- Resumes cannot be uploaded directly from email. If the resume is in your local email application, save the attachment to a locally accessible directory and then upload into Rival Recruit.
- Supported file formats for uploading include Word (.doc, .docx), Rich Text (.rtf), Plain Text (.txt), HTML (.htm, .html) and .pdf converted to text, not obtained directly from a scanner as these are images rather than text-based files.
- Maximum size for resume is 10 MB when applicants upload and 15 MB when recruiters upload.

Upload a resume from a local file

1. From the navigation bar, click **Candidates>Upload**.

The Upload Candidates page opens.

2. Click **Browse**.
3. Navigate to the folder containing the resume and double-click it.

4. Click **Upload**.

The resume is uploaded and parsed.

Note: The parsing process may not be 100% accurate due to the many different formats a resume can be constructed in.

5. On the Upload Candidate page, complete any information not captured by the parser. Also correct any incorrect information.
6. (If applicable) To add an attachment to the candidate's profile, click the **Browse** button in the File Attachment box to locate the file on your local or network directory.
7. From the Associate With Job Posting text box, type at least two letters to view a list of active job postings to tie the candidate to.
8. To define a resume source, select a source from the Select Source field. The default selection is "Local," referring to a candidate imported from a local directory.
9. Click the **Save** button at the top of the screen to complete the process of importing the candidate into Rival Recruit.

You are notified which hiring stage is assigned.

If you did not associate a job with this resume, it gets an Open Prospect hiring stage. If you associated it with a job, the resume gets an Uploaded Candidates Hiring stage.

Access (view) employee referrals

- You can view a list of employee referrals on the Employee Referrals page.
- The page defaults to show only your (the logged-in user) employee referrals, but you can change this view by selecting All or a specific recruiter from the View as Recruiter list.

1. From the navigation bar, click **Candidates>Employee Referrals**.

The **Employee Referrals page** (page 153) opens.

2. Click a candidate's name to access their candidate profile.

View or update an EEO/AA profile

1. From the navigation bar, click **Candidates>EEO/AA Info**.

The EEO/AA Information page opens.

2. Select the radio button of the **Sort By Job Title** or **Tracking Code**.
3. From the Job Posting drop-down list, select a job posting.
4. From the Candidates drop-down list, select a candidate.
5. Make appropriate selections.
6. Click **Submit**.

The candidate information is updated and stored.

Internal employee icon

If a candidate is an internal employee,  appears beside their name on the Resumes page and Candidate Profile. The icon makes it easy for you to identify internal employees.

Tip: The system identifies an internal candidate by how they applied. Candidates who apply via an internal career site are considered internal.

Veteran icon

If **enabled** (see "**Turn on the veteran icon**" on page 222) in your system,  appears beside a candidate's name on the Resumes page and candidate profile if that candidate is a U.S. military veteran.

Recycle bin

When a candidate is deleted, that candidate's record is placed in the recycle bin indefinitely. Candidates in the recycle bin cannot be managed or tracked for jobs. You must have the Purge Recycle Bin permission to access the recycle bin.

Restore candidates from the recycle bin

- Recycled candidates listed in the recycle bin can be restored.
- Restored candidates are restored to the Open Prospects Hiring stage.
- You must have the Purge Recycle Bin permission to perform this task.

- From the navigation bar, click **Candidates>Recycle Bin**.

The Recycle Bin page opens.

- Select the check box of the candidate(s) you want to restore.
- Click  and click **Restore**.

Search candidate records within the recycle bin

- The recycle bin search only searches on a candidate's resume information—not their contact information.
- You must have the Purge Recycle Bin permission to perform this task.

- From the navigation bar, click **Candidates>Recycle Bin**.

The Recycle Bin page opens.

- Enter the search terms in the search text box and click .

Purge candidates from recycle bin

- Purging *permanently* deletes records from the system.
- You can purge individual records or all of them.
- Purging happens via a nightly scheduled task, which occurs during off-peak hours at night (U.S. time).
- You must have the Purge Recycle Bin permission to perform this task.

- From the navigation bar, click **Candidates>Recycle Bin**.

The Recycle Bin page opens.

- To purge:

- An individual candidate or candidates, select their check boxes. Click  and click **Delete**.
 - All candidates in the recycle bin, click  and click **Purge Recycle Bin**.
3. On Purge Resumes window, click **OK**.

The recycle bin shows as empty. The records are queue for *permanent* deletion via nightly scheduled task. After the nightly purge, the purged records no longer appear in the system.

Tags

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Tags

A tag is a way to identify or categorize a candidate so that you can easily filter on them. You may want to tag a candidate based on a specific skill, education, region, or any other attribute.

Example: You are looking for candidates who have SQL experience, have an impressive resume, and prefer remote work. You could create those three tags and assign them to candidates who fit that criteria. On the Candidate Pool page, you can then filter to view only candidates who have those tags.

Key info

- You work with tags in two places in the system: **candidate profile** (on page 125) and Candidate Pool page. The candidate profile works best when dealing with a specific candidate while the Candidate Pool page works best for multiple candidates (bulk action).
- You can **assign tags to candidates** (see "**Assign a tag to multiple candidates (bulk action)**" on page 145), **remove tags from candidates** (see "**Remove tags from multiple candidates (bulk action)**" on page 145), **replace all tags assigned to candidates** (see "**Replace all tags assigned to multiple candidates (bulk action)**" on page 146), and **remove all tags from candidates** (see "**Remove all tags from multiple candidates (bulk action)**" on page 147).

- If tags are assigned to a candidate, you'll see them on the candidate profile:

What would you like to do with this Candidate? ---- Select an Action ----

Candidate
Edit/View

Max Benson  

432 Hillside Road
 Knox, Indiana 40562
 United States
maxb@demotest.com
 Primary Phone 219-582-9964

Primary Contact maxb@demotest.com

Tracked For [Customer Service Representative \(171694\)](#)

SQL ImpressiveResume RemoteWork 

- You can **filter** (see "**Filter candidates by tags**" on page 147) candidates by tags.

Good to know

- Tags can be up to 100 characters. Tags can contain letters, numbers, and spaces. Tags cannot contain special characters.
- There is no limit on how many tags you can assign to a candidate profile.
- The system removes tags that are not assigned to at least one candidate. This means your tag list does not get unruly with unused tags.

Assign a tag or tags to a candidate

- Alternate method: **Assign a tag or tags in bulk to multiple candidates** (see "**Assign a tag to multiple candidates (bulk action)**" on page 145).
 - When creating a new tag, remember that tags can contain letters, numbers, and spaces but cannot contain special characters. Tags cannot exceed 100 characters.
1. Open a candidate's candidate profile.
 2. From the Select an Action drop-down list, select **Assign/Manage Tags**.
 The Assign/Manage Tags window opens.
 3. From the Select a method drop-down, select **Add to existing**.
 4. From the Tag Name drop-down, type the name of the tag. If the tag:
 - Already exists, it appears in the drop-down. Select it.
 - Does not exist (it's new), it appears in the drop-down with *New:* in front of it. Select it.
 5. (If applicable) Repeat step 4 to assign another tag.
 6. Click **Save**.

The tag or tags are assigned to the candidate.

Assign a tag to multiple candidates (bulk action)

- Alternate method: **Assign a tag or tags to a candidate** (on page 144).
 - When creating a new tag, remember that tags can contain letters, numbers, and spaces but cannot contain special characters. Tags cannot exceed 100 characters.
1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. (If applicable) Filter to limit search results.
 3. Select the check box next to the candidate(s) you want to assign tags to.
- Click  and select **Assign/Manage Tags**.

The Assign/Manage Tags window opens.

1. From the Select a method drop-down, select **Add to existing**.
2. From the Tag Name drop-down, type the name of the tag. If the tag:
 - Already exists, it appears in the drop-down. Select it.
 - Does not exist (it's new), it appears in the drop-down with *New:* in front of it. Select it.
3. (If applicable) Repeat step 6 to assign another tag.
4. Click **Continue**.

The tag or tags are assigned to the candidates.

Remove a tag or tags from a candidate

- Alternate method: **Remove tags in bulk from multiple candidates** (see "**Remove tags from multiple candidates (bulk action)**" on page 145).
1. Open a candidate's candidate profile.
 2. From the Select an Action drop-down list, select **Assign/Manage Tags**.

The Assign/Manage Tags window opens.

3. From the Select a method drop-down, select **Find and remove these**.
4. From the Tag Name drop-down, type the name of the tag and then select it.
5. (If applicable) Repeat step 4 to remove another tag.
6. Click **Save**.

The tag or tags are removed from the candidate.

Remove tags from multiple candidates (bulk action)

- Alternate method: **Remove a tag or tags from a candidate** (on page 145).
1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. (If applicable) Filter to limit search results.
3. Select the check box next to the candidate(s) you want to remove tags from.
4. Click  and select **Assign/Manage Tags**.

The Assign/Manage Tags window opens.

5. From the Select a method drop-down, select **Find and remove these**.
6. From the Tag Name drop-down, type the name of the tag and then select it.
7. (If applicable) Repeat step 6 to remove another tag.
8. Click **Continue**.

The tag or tags are removed from the candidates.

Replace all tags assigned to a candidate

- Alternate method: **Replace all tags in bulk for multiple candidates** (see "**Replace all tags assigned to multiple candidates (bulk action)**" on page 146).
1. Open a candidate's candidate profile.
 2. From the Select an Action drop-down list, select **Assign/Manage Tags**.

The Assign/Manage Tags window opens.

3. From the Select a method drop-down, select **Replace all with**.
4. From the Tag Name drop-down, type the name of the tag. If the tag:
 - Already exists, it appears in the drop-down. Select it.
 - Does not exist (it's new), it appears in the drop-down with *New:* in front of it. Select it.
5. (If applicable) Repeat step 4 to select another replacement tag.
6. Click **Save**.

The existing tag or tags are replaced with the tags you selected.

Replace all tags assigned to multiple candidates (bulk action)

- Alternate method: **Replace all tags assigned to a candidate** (on page 146).
1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. (If applicable) Filter to limit search results.
3. Select the check box next to the candidate(s) you want to replace tags for.
4. Click  and select **Assign/Manage Tags**.

The Assign/Manage Tags window opens.

5. From the Select a method drop-down, select **Replace all with**.
6. From the Tag Name drop-down, type the name of the tag. If the tag:

- Already exists, it appears in the drop-down. Select it.
 - Does not exist (it's new), it appears in the drop-down with *New:* in front of it. Select it.
7. (If applicable) Repeat step 6 to select another replacement tag.
 8. Click **Continue**.

The existing tag or tags are replaced with the tags you selected.

Remove all tags from a candidate

- Alternate method: **Remove all tags in bulk from multiple candidates** (see "**Remove all tags from multiple candidates (bulk action)**" on page 147).
1. Open a candidate's candidate profile.
 2. From the Select an Action drop-down list, select **Assign/Manage Tags**.

The Assign/Manage Tags window opens.

3. From the Select a method drop-down, select **Remove all**.
4. Click **Save**.

The tags are removed from the candidate.

Remove all tags from multiple candidates (bulk action)

- Alternate method: **Remove all tags from a candidate** (on page 147).
1. From the navigation bar, click **Candidates>Candidate Pool**.
The Candidate Pool page opens.
 2. (If applicable) Filter to limit search results.
 3. Select the check box next to the candidate(s) you want to clear tags from.
 4. Click  and select **Assign/Manage Tags**.

The Assign/Manage Tags window opens.

5. From the Select a method drop-down, select **Remove all**.
6. Click **Continue**.

The tags are removed from the candidates.

Filter candidates by tags

- When searching for candidates, you can filter candidates by the tag or tags assigned to them.
1. From the navigation bar, click **Candidates>Candidate Pool**.
The Candidate Pool page opens.
 2. Click **Edit Search** to display filters.
 3. From the Tag drop-down, type and select the tag or tags you want to filter by.
 4. Click **Apply Filters**.

Search results appear in the data grid.

Transition from folders to tags

Note: The Candidate Folders feature was removed from Rival Recruit on May 20, 2024 but reinstalled on May 23, 2024. It is fully available for your use. However, you may want to consider transitioning to **tags** (on page 143) because tags are more useful. This topic tells you how.

1. From the navigation bar, click **Candidates>Folders**.

The Folders page opens.

Folders

User
Harris, Susan

☐ Show All Shared Folders

My Folders

Saved search
Saved resume group

IT Pipeline	edit
Project Management	edit
Top Prospects	edit

Shared Folders

Saved search
Saved resume group

Marketing Pipeline	edit
Sales Pipeline	edit

- Click a folder name to expand to show subfolders.

My Folders  Saved search  Saved resume group	
 IT Pipeline	edit
 Help Desk	edit
 Project Management	edit
 Top Prospects	edit

Shared Folders  Saved search  Saved resume group	
 Marketing Pipeline	edit
 Sales Pipeline	edit

- Click a subfolder name.

The page refreshes and displays the candidates in the sub folder.

Workflows All ▼						
Take Action [Change Job Association] ▼ [Perform Recruiting Activity] ▼						
 Edit Details Page size: 50 ▼ page 1						
☐	Match Score	Candidate Location	Enter Date	Job (Tracking Code)	Original Source	Search Flag
☐	N/A	Alexander Taylor Southfield, Michigan United States	6/13/2007	No Associated Job	Advantage	 ★★★★★
☐	N/A	Andy Taylor Chicago, Illinois United States	7/30/2007	No Associated Job	JOB.NET	 ★★★★★
☐	N/A	Angelia Taylor Norcross, Georgia United States	6/12/2007	No Associated Job	INDEED	 ★★★★★

Tip: Increase the page size to the max of 200 (depending on how many candidates are in the folder).

- In the column heading, select the top check box (next to the Match Score column header) to select *all* the candidates on the page.
- From the Perform Recruiting Activity drop-down, select **Assign/Manage Tags**.
- From the Select a method drop-down, select **Add to existing**.

7. From the Tag Name drop-down, type the name of the tag. If the tag:

- Already exists, it appears in the drop-down. Select it.
- Does not exist (it's new), it appears in the drop-down with *New:* in front of it. Select it.

Tip: Keep the name of the tag short. The tag should be something that matches the folder name. For example, if the folder name is Help Desk, the tag should be the same. Also, you can multiple tags if you want.

8. Click **Continue**.

9. If step 3 showed more than one page of results, repeat steps 4 through 8 for each page of results.

10. For each folder, repeat steps 2 through 9.

After you have completed assigning tags, you can then search for candidates by their assigned tags. There is no longer a need to remember what folder a candidate is in. Simply enter the tag name in the Tag filter on the Candidate Pool page and with a click of a button, you'll see all candidates with that tag.

Managing candidates

Change a candidate's hiring stage

- Multiple candidates can be moved from the current hiring stage to another hiring stage.
- Up to 25 resumes can be moved at a time with this function.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.

3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidate(s) you want to change.

5. Click **Take Action** and select **Change Hiring Stage**.

6. On the pop-up window, select a hiring stage and click **Go**.

Reassign candidates to another job posting

- Multiple candidates can be reassigned to another job posting.
- Up to 25 candidates can be reassigned at a time with this function.
- Candidates in the offer or hired stages are not eligible to change job association via this function.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.

3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidate(s) you want to reassign.
5. Click **Take Action** and select **Change Job Association**.
6. On the pop-up window, select a job posting and click **Continue**.

Disposition candidates

- A disposition is a reason why a candidate is not being selected to fill a particular job posting.
 - You can disposition multiple candidates.
 - If you are on the Candidate Pool page for a *specific* job and want to disposition all candidates, use the Email All check box.
 - If not on a specific job, you can disposition up to 25 candidates at a time.
1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidate(s) you want to disposition.
5. Click **Take Action** and select **Change Disposition**.
6. On the pop-up window, select a disposition and click **Continue**.

Remove a candidate's disposition

- You must have the Remove Disposition permission to remove a candidate's disposition.
 - A disposition is a reason why a candidate is not being selected to fill a particular job posting.
 - You can remove disposition from multiple candidates.
 - Alternate method: Do it from the **candidate profile** (see "**Remove a candidate's disposition (from action menu)**" on page 135).
1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidate(s) you want to remove a disposition from.
5. Click **Take Action** and select **Remove Disposition**.
6. On the pop-up window, click **Go**.

Send emails to candidates

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidate(s) you want to send emails to.
5. Click **Take Action** and select **Send Email**.

The Email Candidates page opens.

6. Compose the email or use an available template. Fill out the necessary information for the email correspondence.

Tip: You can choose a template from the drop-down list or create your own email using the text editor and available merge fields.

7. Click **Preview** to preview the email.
8. Click **Continue**.

The selected candidates will receive the email correspondence.

Tip: You can attach files and use the Cc and Bcc options.

Delete candidates

- Up to 25 candidates can be deleted at a time.
 - Deleted candidates are sent to the recycle bin.
 - This option can be turned off if deleting candidates does not align with your business objectives. Your Rival Recruit administrator can contact Rival Support to turn it off.
1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidate(s) you want to delete.
5. Click **Take Action** and select **Delete Selected**.
6. On the pop-up window, click **Continue**.

Set a basic qualification status for candidates

- Qualification status (also known as Qualified) is used for internal tracking purposes.
- It is useful for clients who must remain compliant with OFCCP reporting standards for qualified and not qualified applicants in the United States and for clients who engage in government contracts.
- You can update multiple candidates' qualification statuses.

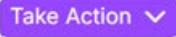
- Up to 25 candidates at a time may have a qualification status assigned.

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list for a job, click the number in the Resumes column.

The Candidate Pool page opens.

4. Select the check box next to the candidate(s) you want.
5. Click  and select **Qualify Selected** or **Disqualify Selected**.
6. On the pop-up window, click **Continue** or **Go**.

Managing employee referrals

Setting up the employee referral application option

For candidates to appear on the Employee Referrals page, they must complete the configurable application form provided on your Candidate Experience career site. The configurable application form must include the question, *How did you hear about us?*

When a candidate selects **Employee Referral** from the *How did you hear about us?* drop-down list, they are required to enter the following information:

Name of the Referrer Employee:
Date of Referral:
Name of the Referred Applicant:
Position Referred For

After completing the referral information, the candidate appears on the Employee Referrals page.

Employee Referrals page

The Employee Referrals page shows a list of employee referrals. It includes candidate name, location, name of employee who referred the candidate, job, and more.

Key info

- The page defaults to show employee referrals for the logged-in user.
- You can change this view by selecting **All** or a specific user from the View as Recruiter list.

Access (view) employee referrals

- You can view a list of employee referrals on the Employee Referrals page.
- The page defaults to show only your (the logged-in user) employee referrals, but you can change this view by selecting All or a specific recruiter from the View as Recruiter list.

1. From the navigation bar, click **Candidates>Employee Referrals**.

The **Employee Referrals page** (page 153) opens.

2. Click a candidate's name to access their candidate profile.

Sort employee referral candidates

1. From the navigation bar, click **Candidates>Employee Referrals**.

The ***Employee Referrals page*** (page 153) opens.

2. Click a column heading to sort by that column.

Take action on employee referral candidates

1. From the navigation bar, click **Candidates>Employee Referrals**.

The ***Employee Referrals page*** (page 153) opens.

2. Select the check box next to the candidate you want to take action on.
3. To:
 - Change job association, from the Change Job Association drop-down list, select the job title to move the candidate into. Follow the on-screen instructions.
 - Perform an action, from the Perform Recruiting Activity drop-down list, select an action to manage the candidate profile. (Actions include changing disposition, corresponding with the candidate, deleting the candidate, and more.) Follow the on-screen instructions.

Candidate hiring process

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Hiring process overview

Key tasks during the hiring process include:

- Selecting candidate profiles (resumes) to send to reviewers
- Sending interview requests to candidates
- Extending offers to candidates

Selecting candidates for review

The system provides flexibility in selecting candidates for resume review. You can select one candidate at a time or multiple candidates.

Select a single candidate for review

1. Access a candidate's candidate profile.
2. From the Select an Action list, click **Request a Review**.

The Request a Review page opens.

3. Accept the default subject line or edit it to create your own.
4. Select the recipients (reviewers):
 - Select internal recipients from the drop-down menu
 - Select external recipients by entering email addresses
5. (Optional) Add email addresses in the Cc and Bcc fields.
6. Select any attachments to include in the email.

Tip: Some attachments may be preselected so that you do not have to select them. It depends on how your system administrator set up this *option* (see "**Set up review request options**" on page 214).

7. Accept the default email message or edit to create your own.
8. Click **Send Email**.

Select multiple candidates for review

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. For the job posting you want, click the resumes number in the Resumes column.

The Candidate Pool page opens.

4. Click (check) the candidates you want reviewed.
5. From the Perform Recruiting Activity list, click **Resume Review/Forward Resume** and click .

The Request a Review page opens.

6. Accept the default subject line or edit it to create your own.
7. Select the recipients (reviewers):
 - Select internal recipients from the drop-down menu
 - Select external recipients by entering email addresses
8. (Optional) Add email addresses in the Cc and Bcc fields.
9. Select any attachments to include in the email.

Tip: Some attachments may be preselected so that you do not have to select them. It depends on how your system administrator set up this **option** (see "**Set up review request options**" on page 214).

10. Accept the default email message or edit to create your own.
11. Click **Send Email**.

Review requests

A review request (also known as a resume review request) is a request for a user to review a candidate for a job. In Rival Recruit, a review request is sent as an email.

What is included in a review request is based on how your system is set up and the options chosen when selecting candidates for review. For example, resumes, eForms, and other attachments can be attached to review requests.

A reviewer can be an external reviewer or internal reviewer:

Reviewer type	Access to Rival Recruit?	Performs reviews by
External	No	Providing feedback through email
Internal	Yes	Using the system: ▶ Task List (see "Perform a resume review on your Task List" on page 55) ▶ Candidate Profile (on page 125) ▶ Reviewed Resumes page (see "Review resumes on the Reviewed Resumes page" on page 157) (available only to hiring managers and only if enabled (see "Turn on the Reviewed Resumes page for hiring managers" on page 213) in your system)

View resume review requests

1. From the header, click .

The **Task List** (page 55) opens.

Resumes requiring your review appear as cards on the Task List.

Perform a resume review on your Task List

1. From the header, click  .

The **Task List** (page 55) opens.

2. (Optional) Enter a keyword to filter (narrow) the Task List.
3. On a resume card, click the **View Resume** link.

The resume opens.

4. Scroll through the resume and review it.
5. Click **Close**.
6. When you are ready to complete the review, click **Complete Review**.

The Complete Review window opens.

7. Select an evaluation.
8. (Optional) Enter a comment.
9. Click **Confirm**.

The system sends an email to the review requester to let them know you completed the review. The email contains your evaluation and comments. Your review is also saved to the candidate's profile (History tab).

Review resumes on the Reviewed Resumes page

- Hiring managers can use the Reviewed Resumes page to view resumes of candidates who they have already reviewed or still need to review.
- Hiring managers only see candidates they are responsible for reviewing. They do not see any candidates for other hiring managers.
- The Reviewed Resumes page is only available to hiring managers and is only available if it is **enabled** (see "**Turn on the Reviewed Resumes page for hiring managers**" on page 213) on your system.

1. From the navigation bar, click **Candidates>Reviewed Resumes**.

The Reviewed Resumes page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Resume reviews that match the filters you selected appear in the data grid.

Disposition a candidate during a review request

- If you have the **Disposition Candidate permission** (see "**Assign user permission to disposition candidate during a review request**" on page 231) assigned to your user ID, you can disposition a candidate during a review request.
1. Search for the candidate and access their candidate profile.
 2. From the Select an Action list, click **Change Disposition**.
 3. On the pop-up window, select a disposition and click **Save**.

Remove completed review requests

1. From the navigation bar, click **Candidates>Reviews Status**.

The Review Status page opens.

2. Click (check) the candidate or whose review you want to remove.
3. Click **Cancel Review**.

Note: Recruiting Managers can use the View as Recruiter menu to toggle between different lists of review requests. Follow the steps above.

Interview requests

Note: This section tells you about the interview functionality that comes with Rival Recruit. **Interview Scheduler** (see "**Interview Scheduling**" on page 236) is a new, purchasable solution that has more capabilities.

Two methods for creating interviews:

- Schedule the appointment and conduct the interview using Rival Recruit
- Enter interview details performed outside of Rival Recruit

Note: Rival Recruit free-busy Interview Scheduler requires the use of the ActiveX component. Interview Scheduler allows Recruiters and Recruiting Managers to see interviewer availability.

Requirements for viewing interviewer availability

- Users must be running Microsoft Outlook version 2003 or higher.
- The company must be using Microsoft Exchange.
- Users must be using Rival Recruit on a system using Windows XP, SP2 or version 2002 or higher.

Create a Rival Recruit interview

1. Access a candidate's candidate profile.
2. From the Select an Action list, click **Schedule an Interview**.

The Schedule Interview page opens.

3. Click the **Rival Recruit Interview** option.
4. Click **Continue**.

The Schedule Interview Options page opens.

5. Click **Choose Interviewers**.

6. Click the interviewers you want and click **Add**.

Tip: Add external recipients by entering their email address and clicking **Add**.

7. Click **Done**.
8. Select a date range and click **Check Availability**. Select the interview time by selecting a start and end time. Click **Done** to schedule the time.
9. (Optional) Enter an interview location and message to send to the interviewers.
10. (Optional) Click the **Include Resume** check box to attach the candidate's resume.
11. Click **Preview Email** to preview the email and then click **Send Interview Requests**.

Create an interview conducted outside of Rival Recruit

- This method of creating an interview assumes that an interview has already taken place and the results are being logged by the Recruiter.

1. Access a candidate's candidate profile.
2. From the Select an Action list, select **Schedule an Interview**.

The Schedule Interview page opens.

3. Select the **an Interview conducted and completed by an interviewer outside of Rival Recruit** option.
4. Click **Continue**.

The Complete Interview - Set Info page opens.

5. Complete the fields.
6. Click **Create**.

Add interview schedule to your MS Outlook calendar

For Microsoft Outlook 2000 and later:

1. Double-click the attached iCalendar (*.ics) file.
2. Choose the **Open** button to open the calendar appointment.
3. Review the content of the appointment.
4. Select **Save and Close** to store the appointment on your Outlook calendar.

Note: Microsoft Outlook 98/2000 users can follow the same instructions as above but should use the .vcs file attachment rather than the .ics file.

Reschedule an interview request

1. From the navigation bar, click **Candidates>Interview Requests**.

The Interview Requests page opens.

2. For the candidate you want, click  and click **Reschedule**.

The Change Interview Request page opens.

3. From Interview Date click the calendar icon and then click on a date in the calendar.
4. From the Time drop-down list select a new value.

5. In the Interview Location text box, type a new location.
6. Select the Check to update interview schedule check box to update the interview schedule.
7. Unselect the Check to update interview schedule check box if you want the requester (recruiter) to update the interview.
8. Click **Send Email**.

If the Check to update interview schedule check box was unselected, an email notification is sent to the recruiter. If the Check to update interview schedule check box was selected, an email notification is sent with the requested changes.

Reply to an interview request email notification

Note: Accepting or declining appointments using the email message automatically updates the Interview Requests page with the appointment status.

Candidate Interview requests are sent by a recruiter or recruiting manager. The interviewer will receive an Interview Request notification via email. This email notification includes the proposed interview schedule, an Accept and Decline link and an iCalendar (.ics) and vCalendar (.vcs) attachment for updating appointment calendars.

Accepting an Interview Request: In the body of the email message, click **Accept** in the Interview Request email, if you accept the schedule of the interview. The Recruiter is notified automatically.

Declining an Interview Request: In the body of the email message, click **Decline** in the Interview request email, if you do not accept the schedule of the interview. The recruiter is notified automatically. If you do not accept the interview request, the candidate will not appear in your Pending Interviews list in the Rival Recruit Inbox.

Complete an interview request

1. From the navigation bar, click **Candidates>Interview Requests**.

The Interview Request page opens.

2. Click a candidate's name.

The candidate profile opens.

3. From the Select an Action list, select an option:

- **Rank Candidate:** Provide general feedback about a candidate's ability to perform for your company. Ranking criteria are general (not job specific). If you provided ranking criteria feedback during the review process, you can edit it now during the interview process.
- **Add Comment:** Add comments about the candidate. Use when you want to record feedback but do not want to send that feedback to the recruiter immediately.
- **Interview Questions:** Enter evaluation question answers to job-specific interview feedback questions.
- **Print Profile:** Print a hard copy of the candidate profile.
- **Download this Profile:** Download the candidate profile to your computer.
- **Complete Interview**—Complete the interview.

4. After you have entered the necessary information, from the Select an Action drop-down list, select **Complete Interview**.

The Complete Interview window opens.

5. Select an evaluation and enter comments.
6. Click **Save**.

Edit interview feedback

1. From the navigation bar, click **Candidates>Interview Requests**.

The Interview Requests page opens.

2. Click a candidate's name.

The candidate profile opens.

3. Make your changes.
4. From the Select an Action drop-down list, select **Complete Interview**.

The Complete Interview window opens.

5. From the Select an Evaluation drop-down list, select a new evaluation and enter any optional comments.
6. Click **Submit**. A new email message is sent automatically to the Recruiter that requested the review. In addition, a new comment is recorded in the History tab of the candidate profile.

Remove completed interview requests

- Removing an interview request does not remove any data from Rival Recruit or the recruiter's view.
1. From the navigation bar, click **Candidates>Interview Requests**.

The Interview Requests page opens.

2. Beside an interview request, click  and click **Remove**.

Offers

A candidate must be moved into an offer-related hiring stage (Offer Approval or Extend Offer) so that an offer can be extended to that candidate.

Note: If your hiring stage names are customized, your offer stages may be named something other than Offer Approval and Offer Extended.

View job offers

- You can view all job offers on the View Job Offers page.
 - Status icons identify whether job offers are pending, approved, or rejected.
 - The Action column displays the action taken/available actions for approved job offers.
1. From the navigation bar, click **Jobs>View Job Offers**.

The View Job Offers page opens.

2. Scroll through to view job offers.

Generate a candidate offer (Initiate offer approval process)

- The first step to extending an offer to a candidate is to record the offer information in Rival Recruit.
- When a candidate is moved into the Offer Approval hiring stage or its equivalent, you are prompted to fill out information pertinent to the offer.

1. Search for and select a candidate.

The candidate's candidate profile opens.

2. From the Workflow stages, select **Offer Approval** and click **Change to selected stage**.

The Move Resume page opens.

3. Select the Expected Start Date.
4. Complete the other fields as needed.
5. Click **Continue**.
6. On the confirmation pop-up, click **OK**.

The Offer Approvals page opens.

7. Select the offer approver or approvers.
8. Determine if you want the offer approval process to be in sequence.
9. Determine if you want to send approval emails.
10. Select any attachments to include in the approval email.

Tip: The attachments available for selection originate from the Attachments tab on the candidate profile.

11. Determine if you want to include an HTML version of the Resume/CV tab.
12. Click **Save**.

Modify offer approval information

When a candidate is moved to an offer-related hiring stage, information is collected about the offer (offered salary, start date, stock options, and so on).

You can edit the offer information using the Modify Offer Information button on the candidate profile:

Candidate
[Edit/View](#)

Gina Caglione
51 Anchor Drive
Waterford, New York 12188
United States
candidate1292@silkroad.com
Primary Phone 518-373-0604

Primary Contact 518-373-0604

Tracked For [Database Engineer \(171601\)](#)


[Modify Offer Information](#)

View existing job offers and offer information

- Job offers are shown on the View Job Offers page.
 - The page lists 25 job offers per page in ascending order (most recent at the end).
1. From the navigation bar, click **Jobs>View Job Offers**.
The View Job Offers page opens.
 2. Scroll the list to see the offers.
 - If the candidate resides in an offer-related hiring stage, and an offer review process has been defined but not completed, the offer has a Pending status and the action column shows the Edit option.
 - If the candidate resides in an offer-related hiring stage, and any approver's status is set to rejected, the offer has a Rejected status and the action column shows the Edit option.
 - If the candidate resides in an offer-related hiring stage, and an offer review process has been completed (the offer has been approved), the offer has an Approved status and the action column shows Edit and Send options.
 3. Click **View** (to review the offer information).
Or
Click **Approval Details** (select the Action drop-down menu to edit the Approval Settings or resend the Approval Email or change status, manually). Approval Status options: Waiting for Response, Approved, Approved with Changes, Rejected with Reason.
Or
Click **Send** (to generate/send the offer letter).

Edit candidate hiring information

When a candidate is moved into the *Hired* hiring stage, information is collected about the hire (hired salary, start date, stock options, and so on). This information can be edited via the Modify Hire Information button on the candidate profile. The Modify Hire Information link is only present if the candidate resides in the Hired Hiring stage.

Requisitions

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Creating and approving requisitions

Requisitions

A requisition is a job that has not yet been approved for posting. After it is submitted and approved, it becomes a job posting.

Not all job postings begin as requisitions. Job postings can be created without going through the requisition approval process. This type of posting is done directly by a recruiter or recruiting manager and cannot be done by a hiring manager.

Note: Contact your Rival Recruit customer administrator for information about your requisition and job posting creation and approval process.

Create Requisitions page

Create Requisition

✕ Cancel
▶▶ Save and Route for Approval
💾 Save

Requisition Administration

Requisition Creator

Don Chandler

Requisition Administrator

[select an option] ▼

Job Creator *

[select an option] ▼

If no one is selected Don Chandler will be the administrator.

Requisition Information

Job Template

Type information to search... 

Use this page to create a requisition. You provide details about the requisition here.

Requisition Administration

Requisition Creator

The user who creates the requisition. A read-only field that cannot be edited.

Requisition Administrator

The individual who sends approval requests and edits/updates the requisition. If the requisition creator defines a requisition administrator other than themselves, requisition is forwarded to the selected requisition administrator when the requisition is saved. A requisition administrator can be a recruiter, recruiting manager, administrator, or hiring manager who created the requisition.

Job Creator

The individual who posts the requisition after it is approved. If there is no approval path on a requisition, the creator of the requisition can post the job immediately after completing the requisition creation form. If there is an approval path, the requisition is sent to the requisition administrator to complete the approval process. After the approval process is complete, the requisition administrator forwards the requisition to the job creator. A job creator can be a recruiter, recruiting manager, or administrator.

Requisition Information

Job Template

Job templates are pre-defined job data sets. Selecting a template will populate the job form with data from the job template. Templates are created and administered by Recruiting Managers and/or Administrators.

Hiring Workflow

A hiring workflow contains specific hiring stages relevant to the hiring process/position.

When a job or requisition is tied to a template, the template hiring workflow takes precedence.

Evergreen Job

Select whether this requisition is for an **evergreen job** (see "**Evergreen jobs**" on page 83). (Default value is No.)

Category

If you want to pre-populate a category on a requisition, select it.

Internal Job Title

Title of the job that is displayed to users of Rival Recruit.

Posted Job Title

Title of the job that is displayed to applicants. If this field is left blank, internal job title is displayed to applicants.

Tracking Code

Requisition number or Job ID value. If you do not enter a code, Rival Recruit generates one when the requisition becomes a job posting.

Note: Rival Recruit does not generate a tracking code in a sequential sequence. For example, if you enter a tracking code of "1," the next job you enter will not automatically be assigned a tracking code of "2." If your organization is interested in having sequential tracking code values generated automatically by the system, contact Rival Support.

Number of Positions

Number of heads or seats that are needed to fill the job.

Status Change Rules

(Available if **turned on** (see "**Turn on automatic job posting status change rules**" on page 222))
Rival Recruit can now automatically change a job's posting status based on rules that you create here.

Add a rule (see "**Add a rule to automatically change job posting status**" on page 74).

Position Type

Select the type of position (Full Time/Regular, Part-Time, etc.). This value is displayed to applicants.

Job Level

Choose the level for the job (Internship, Entry Level, Mid-Career, Executive). This field is used to route the job when posting to third-party internet job boards.

Duration

Expected length of the assignment. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Expected Start Date

The desired start date for a candidate. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Location Details

Job Location Code

Select a location code. It populates the City, State, Zip and Country fields. (These location codes are administered by your administrator).

As you type, a list of acceptable values are shown. If the Job Location Code values do not appear in your Rival Recruit instance, it is because your administrator has not configured any locations.

Tip: If **remote job location** (on page 79) is turned on and your administrator created remote job locations, those remote job locations will be available from the drop-down.

Country

Select the country the job posting is based in.

City

The city the job is based in. If this is a regional position, enter the closest metropolitan area or your company's home base and indicate in the job description that the position is regional.

State

The state the job is based in. If this is a regional position, enter your company's home base and indicate in the job description that the position is regional.

Zip/Postal Code

The postal code the job is based in. If this is a regional position, enter your company's home base zip code and indicate in the job description that the position is regional.

Tip: Because US EEO and compliance laws do not apply internationally, if the country selected is anything other than United States on the job profile, the compliance section does not appear.

Additional Locations

Use this field when posting a job that is hiring for multiple locations. You can assign up to 10 additional locations for the job posting. As you type, a list of available locations are shown. Available locations come from the location codes your administrator set up. Your company locations must include city and state to make the location an available option in this field. If **remote job location** (on page 79) is turned on and your administrator created remote job locations, they are selectable here.

Note: If the Additional Locations field is added to the Job Details page in Candidate Experience, the additional locations appear on the job posting on your Candidate Experience career site.

Compliance

EEO-1 job category

The EEO-1 category the job type falls under.

AAP Job Group

The AAP Job Group is a sub-level to the EEO-1 Job Category. You can associate you own EEO Groups under the categories. These groups are optional and can only be created by recruiting managers or administrators.

Position Requirements

Travel

Select the amount of travel required to perform the job. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Per Diem Included?

Select whether the position offers a per diem allowance. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Salary Minimum

The minimum offered salary for the job.

Salary Maximum

The maximum offered salary for the job.

Salary Type

Select a salary type. This is the frequency in which the job salary is paid.

Salary Currency

Select the international currency in which the job salary is paid.

Level of Education

Select the minimum acceptable level of education. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Years of Experience

Enter the number of years of experience required to perform the job. This field is only used when posting to some third-party job boards. It is not posted to Rival Recruit-hosted internal and external job listings sites.

Budgeting Details

Department

Select the department the job should be associated with. Once you begin typing, a list of acceptable values display. The department name can be displayed on the job listings for internal applicants.

Budgeted Salary

Enter the salary budgeted for this position. This information is not shown to applicants.

Budgeted Currency

Select the international currency in which the job salary is paid.

Budgeted Quarter

Enter the quarter that the salary was budgeted in. This information is not shown to applicants.

Budgeted Year

Enter the year that the salary was budgeted in. This information is not shown to applicants.

EmployeeReferrals.com

Description/Skills

Note: Fields in this section support the use of the HTML editor. The HTML editor processes the content and applies the HTML tags so that the content displays on web pages as expected. However, copying and pasting previously formatted content out of word processing software such as Microsoft Word directly into the Rival Recruit HTML Editor is NOT recommended and often yields unexpected results.

Tip: Want to let **Artificial Intelligence** (see "**Generative AI job description**" on page 58) (AI) generate these fields for you? Click **Generate Job Description with AI**.

Job Description

The description of the job. There is no character limit on this field. HTML tags are accepted for advanced text formatting.

Required skills

List the required skills for the job. There is no character limit on this field. HTML tags are accepted for advanced text formatting.

Required Experience

Enter any required experience for this position. There is no character limit on this field. HTML tags are accepted for advanced text formatting.

Internal Fields

Skills Candidate Should Possess

Enter any notes about the skills required to perform the job. Only Rival Recruit users can view the internal skills. Applicants cannot view the contents of this field.

Notes on Position

Enter any notes about the job. Only Rival Recruit users can view the internal notes. Applicants cannot view the contents of this field.

Custom Fields

Depending on your company's specific configuration, there may be custom fields at the bottom of the form. If so, complete them.

Create a requisition

1. From the navigation bar, click **Jobs>Manage Requisitions**.

The Manage Requisitions page opens.

2. Click  and click **Create Requisition**.

The **Create Requisition page** (page 164) opens.

3. Enter information for the requisition.
4. (Optional) **Add a rule to automatically change job posting status** (on page 74).
5. Click **Save** or **Save and Route for Approval**.

Print requisition details

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job title.

The Job Posting Details page opens.

4. Click  and click **Requisition Details**.

The Requisition Details page opens.

5. Click **Print**.

Requisition approval paths

When creating a requisition, you can define an approval path for the requisition. There are two options:

- Sequential review
- Non-sequential review

Sequential review

A sequential review means that reviewers review a requisition in a specific sequence. Reviewer 1 reviews it, then reviewer 2, and so on. A sequential review is automated.

Reviewer 1	Receives an approval request email. Email includes requisition details, names of other approvers, and other approvers' approval statuses. If reviewer approves the requisition: ▶ Their approval status becomes Approved and approval date is recorded ▶ An email notification is sent to the requisition administrator ▶ Approval request email is sent to the next reviewer in sequence If reviewer rejects the requisition: ▶ Their approval status becomes Rejected with Reason ▶ They enter a reason why they rejected requisition ▶ Rejection email is sent to the requisition administrator ▶ Requisition administrator corrects requisition and resends approval request to the reviewer and the process starts again Or Requisition administrator manually changes requisition approval status to Approved and clicks the Email Review button for the next reviewer in sequence. Approval request email is sent to that reviewer.
Reviewer 2	Same process as reviewer 1.
Last reviewer in sequence	Same process as previous reviewers except: ▶ When the last reviewer approves the requisition, an approval request email is not sent to the next reviewer in sequence because there isn't one. Instead, a notification is sent to the job creator, indicating the job is ready to be posted.

Non-sequential review

A non-sequential review means that reviewers review a requisition based on a requisition administrator's choices. It is not automated. A requisition administrator can choose to send approval requests to every reviewer at the same time (Email All button) or to individual reviewers (Email Reviewer button).

When a reviewer approves a requisition, the system does not trigger an email to the next reviewer in the chain. The requisition administrator must submit the next review request manually unless the Email All option was initially used.

Create a sequential approval path for a requisition

- You can select up to 10 approvers per requisition.
- Approvers must have requisition approval permission to be selected as an approver.

1. When creating a requisition, click **Save and Route for Approval**.

The Requisition Approval Settings page opens.

2. In the Approvers list, begin typing an approver and click it.
3. Repeat step 2 for each approver.

The approvers appear in the Approvers list:

The screenshot shows the 'Approvers' section of the Rival system. It features a search bar at the top, a '2 / 10' indicator, and a 'Remove All' button. Below these, there is a list of two approvers: '1 Don Chandler' and '2 Joe Aleman', each with a small 'x' icon to its right.

4. (If applicable) Drag and drop them to reorder the sequence.
5. Verify the **Review in Sequence** check box is checked.
6. Do one of the following:
 - If you are *not* ready for the system to route the approval emails yet, uncheck the **Send Email** check box.
 - If you are ready for the system to route approval emails, leave the **Send Email** check box checked.
7. Click **Save**.

If the Send Email check box was checked (in previous step), the system sends approval emails to all approvers and the process starts.

If the Send Email check box was *not* checked (in previous step), the system does not send approval emails yet. When ready, click **>Send Email** beside the first reviewer in the grid. The system sends approval emails and the approval process starts.

Create a non-sequential approval path for a requisition

- You can select up to 10 approvers per requisition.
 - Approvers must have requisition approval permission to be selected as an approver.
1. When creating a requisition, click **Save and Route for Approval**.

The Requisition Approval Settings page opens.

2. In the Approvers list, begin typing an approver and click it.
3. Repeat step 2 for each approver.

The approvers appear in the Approvers list:

The screenshot shows the 'Approvers' section of the Rival system. It features a search bar at the top, a '2 / 10' indicator, and a 'Remove All' button. Below these, there is a list of two approvers: 'Don Chandler' and 'Joe Aleman', each with a small 'x' icon to its right.

4. Uncheck the **Review in Sequence** check box.
5. Leave the **Send Email** check box checked.
6. Click **Save**.

This is a non-sequential approval so the system does not automatically send approval emails.

- When you are ready to send approval emails, click > **Send Email** beside each reviewer in the grid.

Managing and editing requisitions

Manage Requisitions

View as Recruiter: [All]

0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

View all Requisitions

Approval Status	Requisition (Tracking Code) Location Name (Location Code)	Requisition Owners	Dates	
N/A	Accounting Manager (123456789) Jacksonville (0000000032)	Requested By: Michael Baxter Admin By: Michael Baxter To Be Posted By: Susan Harris	Created: 8/2/2023 Changed: 10/31/2023, 12:03 PM	
	Accounting Manager (123321456654) Jacksonville (0000000032)	Requested By: Susan Harris Admin By: Monica Edwards To Be Posted By: Lucee Admin	Created: 7/21/2022 Changed: 10/24/2023, 8:54 AM	
	Benefits Administrator (12345678911) North Carolina (0000000010)	Requested By: Susan Harris Admin By: Susan Harris To Be Posted By: Susan Harris	Created: 5/7/2016 Changed: 10/24/2023, 4:13 AM	

Use the Manage Requisition page to manage and edit requisitions.

Key info

- Requisitions are sorted with most recent requests at the top.
- Use the arrow buttons to page through the requisitions or click a letter in the alphabetical bar to see open requisitions starting with that character.
- Click to access actions like creating a requisition, posting a requisition, and filtering to show only requisition ready to be posted.
- Recruiting managers can use the View As list to view as the user they select.

Good to know

- Approval Status is represented by an icon, and you can hover over an icon to see its title (Rejected, Approved, Pending):

One or more approvers rejected the requisition

Approval process initiated but not yet complete

Requisition is approved and can be posted

N/A No approval path defined

Edit a requisition

Note: If your administrator enabled the Lock All Requisition Fields During Approval Process setting, requisitions that are in an approval process cannot be edited (Save and Save and Route for Approval buttons are unavailable) until all approvers are removed from the approval process.

- From the navigation bar, click **Jobs>Manage Requisitions**.

The Manage Requisitions page opens.

2. Beside a requisition, click  and click **Edit**.
The Edit Requisition page opens.
3. Make changes and then click **Save** or **Save and Route for Approval**.

View requisition approval details

1. From the navigation bar, click **Jobs>Manage Requisitions**.
The Manage Requisitions page opens.
2. Beside a requisition, click  and click **Approval Details**.
The Requisition Approval Settings page opens and shows requisition approval details.

Edit requisition approval details

- Editing may include adding or removing reviewers, modifying a reviewer's approval status and respond date, and more.
1. From the navigation bar, click **Jobs>Manage Requisitions**.
The Manage Requisitions page opens.
 2. Beside a requisition, click  and click **Approval Details**.
The Requisition Approval Settings page opens and shows requisition approval details.
 3. Make changes.
 4. Click **Save**.

Post an approved requisition

- A requisition can be posted as a job after it is approved or if it does not have a defined approval path.
1. From the navigation bar, click **Jobs>Manage Requisitions**.
The Manage Requisitions page opens.
 2. Beside a requisition, click  and click **Post**.

Print requisition approval details

1. From the navigation bar, click **Jobs>Job Tracking**.
The Jobs page opens.
2. (If applicable) Filter to limit search results.
3. In the list, click a job title.
The Job Posting Details page opens.
4. Click  and click **Edit This Job**.
The Edit Job Posting - Position Details page opens.
5. Click  and click **Requisition Approval Details**.

6. On the Requisition Approval Details page, click  and then click **Print**.

Review a job posting's requisition details

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job title.

The Job Posting Details page opens.

4. Click  and click **Requisition Details**.

If the job posting went through the requisition process, the details page shows requisition title, requisition creator, creation date, requisition approval administrator, changed by name and date (if any), and requisition poster. Otherwise, a message opens and alerts you that no requisition was required.

Administration

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AAP job groups

Affirmative Action Plan (AAP) job groups are a subdivision of EEO-1 categories and are used to group jobs that require similar skills and have similar job duties, promotional opportunities, and wages.

Manage/edit AAP job groups

1. From the navigation bar, click **Administration>AAP Job Group**.

The AAP Job Group page opens.

2. From the Select an EEO-1 Category list, select an EEO-1 Category.

Tip: If this is the first time anyone in your organization used this page, there is already a single sub-category created and named the same as the main EEO-1 job category.

The Edit AAP Job Group(s) table appears.

3. To:
 - Edit an AAP job group, type over the existing value.
 - Add an additional AAP job group, click **Add**. A row is added to the table. Enter information.
4. Select the radio button to the left of the AAP job group name to indicate which value is selected by default when a user selects the parent EEO-1 Job Category.
5. Click **Save**.

Note: AAP job groups cannot be deleted through the user interface.

Business units

Business units represent a specific business segment within the company. A company may have one or many business units. Each time a job is created it must be assigned to a single business unit.

Business units are visible when viewing the job details within the system and are included in the Job Hosting RSS/XML feed feature.

Add a new business unit

1. From the navigation bar, click **Administration>Business Units**.

The Business Units page opens.

2. Click **Create**.

The Business Units page opens.

3. Enter a name (label) for the business unit.
4. Enter a description.
5. Leave the **Active** option as **Yes** to create an active business unit or select **No** to create an inactive one.
6. Click **Save**.

Edit an existing business unit

1. From the navigation bar, click **Administration>Business Units**.

The Business Units page opens.

2. In the list, click a business unit label.
3. Make your edits.
4. Click **Save**.

Deactivate an existing business unit

- You cannot deactivate a business unit if there are *active* jobs linked to it. Click the **active jobs** link and reassign them to other business units before attempting to deactivate the business unit.
- The active jobs link only links to active jobs you have access to. There may be other active jobs that you cannot access/reassign.

1. From the navigation bar, click **Administration>Business Units**.

The Business Units page opens.

2. In the list, click a business unit label.
3. Set the **Active** option to **No**.
4. Click **Save**.

The business unit is deactivated and is no longer available for selection when creating or editing a job.

Company locations

Company locations help ensure your job posting are accurately classified for searching, reporting and management.

Each job and requisition record can be associated with a single company location. Company locations are used throughout Rival Recruit for searching and filtering.

Some company location data is fed in from an external source (like an HRIS system) through Rival Recruit's web-based interfaces. If your company does this, any changes you make may be overwritten by

what is coming into the database via the data feed. Usually a customer sets up a feed to automate the administration of the support data. If your company does have an automated feed, use that feed to make edits not the tools in the user interface.

Add a new company location

1. From the navigation bar, click **Administration>Company Locations**.

The Company Locations page opens.

2. Click **Create**.

The Location Details page opens.

3. Enter a name for the location and a location code.
4. Enter the location's address, phone number, and fax number.
5. (If applicable) Enter the location's HRIS code.
6. (If applicable) Enter any notes about the location.
7. Click **Save this Location**.

Edit an existing company location

1. From the navigation bar, click **Administration>Company Locations**.

2. In the list, click a location name.

The Location Details page opens.

3. Make your changes.
4. Click **Save this location**.

Deactivate an existing company location

- You cannot deactivate a company location if there are *active* jobs linked to it. Click the **active jobs** link and resolve them before attempting to deactivate a company location.
- You can deactivate a company location if there are *inactive* jobs linked to it. If one of those jobs is reactivated, the location is automatically activated again.

1. From the navigation bar, click **Administration>Company Locations**.
2. In the list, click a location name.

The Location Details page opens.

3. Click **De-activate this location**.

Deactivating a location ensures that future requisition and jobs cannot be associated with this location.

Note: Deactivating the location does *not* affect existing records.

Create a worldwide remote location

1. From the navigation bar, click **Administration>Company Locations**.

The Company Locations page opens.

2. Click **Create**.

The Location Details page opens.

3. In the Location Name field, type **Remote (Worldwide)**.
4. In the Location Code field, type a location code.
5. In the Country field, select **Remote (Worldwide)**.
6. Click **Save this Location**.

Create a countrywide remote location

1. From the navigation bar, click **Administration>Company Locations**.

The Company Locations page opens.

2. Click **Create**.

The Location Details page opens.

3. In the Location Name field, type **Remote (Countrywide)**.
4. In the Location Code field, type a location code.
5. In the Country field, select a country.
6. From the State drop-down, select **REMOTE**.
7. Click **Save this Location**.

Create a statewide remote location

1. From the navigation bar, click **Administration>Company Locations**.

The Company Locations page opens.

2. Click **Create**.

The Location Details page opens.

3. In the Location Name field, enter a descriptive remote statewide location.

Example: If you are creating a location for a remote location in California, the Location Name would be something like this: Remote (CA Statewide).

4. In the Location Code field, type a location code.
5. In the Country field, select a country.

Example: If you are creating a remote location in California, you would select United States.

6. In the City field, type **Remote**.
7. From the State drop-down, select a state.

Example: If you are creating a remote location in California, you would select California.

8. Click **Save this Location**.

Departments

Departments are used to provide sorting and reporting capabilities for job and requisition records. Every job that is created must be assigned to a single department. Many standard reports can be filtered by department.

Departments in Rival Recruit are single-tiered and may not necessarily equate to what you call a department internally at your organization.

Add a new department

1. From the navigation bar, click **Administration>Departments**.

The Departments page opens.

2. Click **Create**.
3. Enter a department name.
4. Enter a number.

This is a unique identifier for the department. It is displayed in parenthesis next to the department name throughout the user interface: Marketing (MKT555).

5. Enter a note. This field is not displayed in the user interface. Use it for administrator notes.
6. Click **Save**.

Edit an existing department

- If your organization uses an external source (like an HRIS system) to feed department data, do not edit it here. Edit it in the source system.

1. From the navigation bar, click **Administration>Departments**.

The Departments page opens.

2. In the list, click a department.
3. Make your changes.
4. Click **Save**.

Deactivate an existing department

- When deactivating a department, all jobs associated with this department must be identified. Before you can deactivate the department, you can choose to either deactivate the job, thereby, pushing all resumes associated with that job to the Viewed Candidates stage OR change the department associated with the job

1. From the navigation bar, click **Administration>Departments**.

The Departments page opens.

2. In the list, click a department.
3. Click **De-activate**.
4. Click **Save**.

Email

Use email (formerly Candidate Correspondence Engine) to communicate via email with single or multiple candidates through Rival Recruit. Recruiters can use pre-defined email message templates created by an administrator and compose email messages to send to recipient(s).

Using email, you can:

- Send rejection letters to job candidates not being pursued
- Send requests for EEO information to applicants
- Send post-offer self-identification veteran and disability forms to hires
- Send requests to candidates to update their resume
- Send opportunity notifications to candidates for new openings
- Track day-to-day email correspondence with candidates

Rival Recruit supports automatic reply emails to candidates applying online; however, those messages are not configured as email templates. Auto-reply emails are configured in the applicant interface.

Create a new email template

1. From the navigation bar, click **Administration>Email Templates**.

The Create Batch Email Template page opens.

2. In the Create New Template text box, type the title. Make it descriptive. This is what is displayed when selecting a template.
3. In the Define Email Subject text box, type a subject for the email message. This is the subject line that your message always uses when this template is selected. The subject line cannot contain merge fields.
4. In the Define Message Content text box, type your message.

You can include **merge fields** (see "**Use merge fields in email messages**" on page 181). Rival Recruit will replace the merge field with account/candidate related data.

Tip: If your team sends a merge field for the candidate to complete the EEO form or an e-application form, the hyperlinks are one-time use only and the links expire after the applicant completes the form.

Tip: You can use the HTML text editor to further drive your branding message. The HTML text editor allows users with permission to create emails to send in batch files to recipients. You can type text, paste text from a Word document or text file, insert hyperlinks, view the HTML source, and insert images.

5. Click **Preview** to preview your message.
6. Click **Save** to store your new template.

Note: Email templates cannot be defined with pre-selected file attachments but users can add attachments when sending emails created from templates.

Edit an email template

1. From the navigation bar, click **Administration>Email Templates**.

The Create Batch Email Template page opens.

2. From the Select an existing template list, select an email template.
3. Make your changes.
4. Click **Save**.

Delete an email template

1. From the navigation bar, click **Administration>Email Templates**.
The Create Batch Email Template page opens.
2. From the Select an existing template list, select an email template.
3. Click **Delete**.

Use merge fields in email messages

1. From the navigation bar, click **Administration>Email Templates**.
The Create Batch Email Template window opens.
2. From the Select an existing template list, select an email template to edit.
3. Set your cursor position in the message content area (where you want the merge field to go).
4. Click **Merge Fields**.
5. From the Merge Field list, click a **merge field** (see "**Merge fields for email**" on page 181).

The merge field is placed in the message content. The merge field string is replaced with data from the system when the message is sent.

Tip: Merge fields can only be used in the message body not the subject line.

If you decide to use a merge field for an EEO/OFCCP form or e-application form, note the hyperlink provided is one-time use for the candidate. After the candidate completes these forms, the hyperlink is expired.

Merge fields for email

Here is a current list of system-generated merge fields for email (formerly CCE).

- Assigned Hiring Manager Name
- Assigned Recruiter Email
- Assigned Recruiter Name
- Assigned Recruiter Phone
- Assigned Recruiting Manager Email
- Assigned Recruiting Manager Name
- Assigned Recruiting Manager Phone
- Business Unit
- Candidate First Name
- Candidate Last Name
- Candidate's Name

- Candidate's Residence
- Company Name
- Department
- EEO Info
- EEO + OFCCP pre-offer Vet.
- EEO + OFCCP post-offer Vet.
- Email Sender Email
- Email Sender Name
- Email Sender Phone
- Enter Date
- Job Location
- Modify Resume
- OFCCP Disability pre-offer
- OFCCP Disability post-offer
- Position Title
- Today's Date
- Tracking Code

Evaluation questions

Evaluation questions [formerly Candidate Qualification Engine (CQE)] are screening tools that help qualify candidates from pre-screening to in-person interviewing. Using evaluation questions, recruiters can reduce their workload and focus on fully qualified candidates. With evaluation questions, users can:

- Create multiple sets of pre-screening questions specific to particular skill sets, locations, recruiters, jobs or job types.
- Score candidate responses based on their answers to multiple-choice and yes/no questions.
- Pre-screen candidates based on their answers to multiple-choice and yes/no questions.
- Standardize multiple sets of pre-screening interview questions specific to particular skills sets, locations, recruiters, hiring managers, jobs, and so on.
- Create custom questions for the external candidate interface, internal candidate interface, fee agency candidate submissions, recruiter screening and interviewing.
- Add evaluation questions to job templates, set the section where they appear, and set whether required or not.
- Set up a standard ranking form, which is filled out when interviewing a candidate.

Recruiting managers or administrators create evaluation questions. Recruiters can select those questions during the job creating/posting process.

Evaluation question categories

Evaluation question categories are a way to organize evaluation questions into logical groups. They help recruiters find and select appropriate questions to include with a job during the job creation/editing process.

Create a new evaluation question category

1. From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

2. Click  and click **Create Category**.

The Manage Evaluation Category page opens.

3. Enter a category name. Make it descriptive so that recruiters can easily find questions related to this category.
4. (Optional) Enter a brief description of what this category should be used for. This description is displayed to the recruiter during the assignment of questions to a job record.
5. Click **Save**.

Edit an evaluation question category

1. From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

2. In the list, click a category name.

The Manage Evaluations - Display Questions page opens.

3. Click  and then click **Modify**.

The Manage Evaluation Category page opens.

4. Make your updates.
5. Click **Save**.

Delete an evaluation question category

- A category cannot be deleted if there are active questions assigned to the category. Each question must be re-assigned to a different question category.

1. From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

2. In the list, click a category name.

The Manage Evaluations - Display Questions page opens.

3. Click  and then click **Modify**.

The Manage Evaluation Category page opens.

4. Click **Delete**.

Evaluation questions

Evaluation questions are questions posed to candidates to pre-screen them about their qualifications. They can be free text, Yes/NO, and multiple choice. Yes/No and free text questions can have evaluation weights, answers, and grades.

Create an evaluation question

- Creating an evaluation question is a multi-step process:



- From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

- Click  and click **Create Question**.

- Define the question type:

- Select a question type: Yes/No, Free Text, or Multiple Choice
- Click **Next**.

- Define the question:

- Type in the text of the question. (No limit on the question's length. HTML formatting not supported.)
- Click **Next**.

- Define an evaluation weight:

Note: This step only applies to Yes/No and Multiple Choice questions.

- Enter an evaluation weight for the question. An evaluation weight defines the maximum score a candidate can receive for the question.

Example: If you were defining a multiple-choice question and response A is worth 5 points and response B is worth 10 points, the evaluation weight for the response cannot exceed 10 points because 10 is the highest number of points obtainable for any response.

- Click **Next**.

- Define question answers:

Note: This step only applies to Yes/No and Multiple Choice questions.

- For multiple choice questions, input the set of possible answers to select from in the Answer column. For Yes/No formatted questions, the possible responses are pre-populated with Yes or No options.
- Input a grade for each possible answer. The grade is the number of points a candidate receives for choosing an answer. The grade can never exceed the evaluation weight of the question.
- If you want the selection of a particular answer(s) to result in the candidate being flagged as a 'fail', set the fail flag for the answer(s).

When a fail flag is triggered it displays on a candidate's job tracking and/or hiring list without regard to any other questions or answers.

- d. If you want to allow an answer other than the choices provided, place a check mark next to this option.
 - e. Click **Next**.
7. Assign questions to evaluation question categories:
 - a. Select the category to assign a question to using the drop-down list.
 - b. Click **Preview Question & Answer** to preview the question.

The Manage Questions page provides a re-cap of all the information you entered.

8. Click **Save**.

Edit an evaluation question

- Edits you make do not affect questions already associated with existing jobs/candidates. Edits are reflected when the question is selecting during the creation of a new job.
1. From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

2. In the list, click the category name that contains the question you want to edit.

The Manage Evaluations - Display Questions page opens.

3. In the list beside a question, click **Edit**.
4. Make your changes and click **Next** to go through all the steps (pages).
5. Click **Save**.

Add evaluation questions to a job template

- Evaluation questions on a job template ensure consistency during the requisition and job posting creating process.
 - You can mark evaluation questions as required or optional.
 - You can select the sections where evaluation questions display during the application and hiring process.
1. From the navigation bar, click **Administration>Job Templates**.
 2. In the list, click a template name.
 3. Beside Evaluation Questions, click **...**.
 4. Select the evaluation question category containing the evaluation questions you want.

The link expands and shows evaluation questions.

5. Toggle on the questions you want to add to the job template.
6. Click the **Required** check box beside a question to make it required.
7. Click the sections where the evaluation questions will appear.
8. Click **Finished**.

9. Click **Save** to save the job template.

Calculating evaluation questions scores

Here's an example of how evaluation questions scores are calculated.

A recruiter creates an Account Executive position and associates three multiple choice questions.

	Evaluation weight	Maximum points available	Possible answers
Question 1	100	100	Response A=100 points Response B=50 points Response C=0 points
Question 2	75	75	Response A=75 points Response B=0 points
Question 3	50	50	Response A=50 points Response B=25 points Response C=0 points

A candidate submits a resume for the Account Executive position and provides the following responses:

- Question 1 – Response C
- Question 2 – Response A
- Question 3 – Response B

Evaluation score=Total number of evaluation points/Total number of evaluation points available.

For this candidate:

(Response C/Question 1) 0 + (Response A/Question 2) 75 + (Response/Question 3) 25 = 100

Divide by

(Evaluation Weight/Question 1) 100 + (Evaluation Weight/Question 2) 75 + (Evaluation Weight/Question 3) 50 = 225

equals (=)

100/225=.44 or 44 percent

.44 is the number that is shown in the Evaluations tab when viewing this candidate's candidate profile.

Ranking criteria

Ranking criteria is a set of non-job specific parameters that recruiters and hiring managers use to rank candidates. Up to 25 ranking criteria can be defined within an account.

Ranking criteria can be filled at any point after the candidate enters Rival Recruit. Rival Recruit stores the rankings of each user who ranked the candidate and calculates a score based on those rankings.

Create ranking criteria

1. From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

2. Click  and then click **View Ranking Criteria**.

The Candidate Ranking Criteria page opens.

3. Click  and then click **Add Criteria**.
4. Define the new criteria for evaluating and ranking job candidates.
5. Click **Save**.

Edit ranking criteria

1. From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

2. Click  and then click **View Ranking Criteria**.

The Candidate Ranking Criteria page opens.

3. Beside a ranking criteria, click  and click **Edit**.

The Edit Candidate Ranking page opens.

4. Make your changes and click **Save**.

Delete ranking criteria

1. From the navigation bar, click **Administration>Evaluation Questions**.

The Manage Evaluations page opens.

2. Click  and then click **View Ranking Criteria**.

The Candidate Ranking Criteria page opens.

3. Beside a ranking criteria, click  and click **Delete**.

Fee agencies

A fee agency (placement agency) is any agency/organization that provides candidates to a company for a charge per hire.

Candidates submitted by fee agencies are checked for duplicates during entry. If an agency attempts to submit a candidate who is already in Rival Recruit, they are informed the candidate is already on file and cannot complete the submission.

Fee agencies cannot submit EEO information on behalf of a candidate.

Create a fee agency

1. From the navigation bar, click **Administration>Fee Agencies**.

The Fee Agencies page opens.

2. Click  and click **Create a Fee Agency**.

The Create a Fee Agency page opens.

3. Enter a name for the fee agency. Fee agency name appear as the source for any candidate submitted online by this agency.
4. Enter the fee agency's address, phone number, fax number, and email address.
5. Enter login name and password. These are the credentials the fee agency uses to log into the Rival Recruit-hosted public website.
6. Enter the subscription start and expiration dates.
7. Enter the daily resume submission limit (maximum number of candidates agency can submit in a 24 hour period).
8. Enter the rate (percentage of hired salary that agency charges customer for filling a job).

Tip: This field is not used to calculate cost-per-hire reports.

9. Indicate whether the fee agency is allowed to submit duplicate candidates. Three options:
 - Allow this agency to submit any candidate
 - Do not allow this agency to submit candidates who are already linked to the same job
 - Do not allow this agency to submit candidates who already exist in the system
10. Enter any notes about the fee agency.
11. Click **Save**.

Deactivate a fee agency

1. From the navigation bar, click **Administration>Fee Agencies**.
2. Filter to show active fee agencies.
3. Click the check box beside a fee agency.
4. From the Take Action list, click **Deactivate** and click .
5. On the confirmation pop-up, click **Continue**.

Activate a fee agency

1. From the navigation bar, click **Administration>Fee Agencies**.
2. Filter to show inactive fee agencies.
3. Click the check box beside an inactive fee agency.
4. From the Take Action list, click **Activate** and click .
5. On the confirmation pop-up, click **Continue**.

Send an email to a fee agency

1. From the navigation bar, click **Administration>Fee Agencies**.
2. Click the check box beside a fee agency.
3. From the Take Action list, click **Send Email** and click .
4. Complete the Send Email form and click **Go**.

Access (view) jobs assigned to a fee agency

- Recruiting Managers can do this task. Recruiters and administrators cannot.

1. From the navigation bar, click **Administration>Fee Agencies**.
2. For a fee agency, click the job number link in the Jobs column.

The Jobs page opens and displays all jobs assigned to the fee agency.

Access (view) resumes submitted by a fee agency

- Recruiting managers can do this task. Administrators and recruiters cannot.
1. From the navigation bar, click **Administration>Fee Agencies**.
 2. For a fee agency, click the resume number link in the Resumes column.

The Candidate Pool page opens and displays resumes submitted by the fee agency.

Export candidate search results to a Microsoft Excel file

- If you have the Export Fee Agency Search Results permission, you can export fee agency search results.
 - If search results have more than 500 results, only a maximum of 500 results are exported.
1. From the navigation bar, click **Administration>Fee Agencies**.

The Fee Agencies page opens.

2. Click **Edit Search** to display filters.
3. Select filters.
4. Click **Apply Filters**.

Search results appear in the data grid.

Tip: Only the columns shown on the page are eligible to be exported. If you want additional or different columns exported, add them before exporting.

5. Click  and then click **Export Search Results**.
6. On the confirmation pop-up, click **Download**.
7. On the Save File pop-up, open the file in Microsoft Excel or save the file to your computer.

Job categories

Job categories are a classification system for job postings. Job categories make it easier for candidates to browse jobs because they can filter by job categories.

Job categories are initially configured during implementation but Rival Recruit administrators maintain them.

Add a new job category

1. From the navigation bar, click **Administration>Job Categories**.

The Job Categories page opens.

2. Click  and then click **Create New Category**.
3. Enter a job category name.
4. Click **Save**.

The job category is saved and it is listed on the Job Categories page.

5. (If applicable) Add 2nd-Level or 3rd-Level sub-categories.

Tip: Adding the first 2nd level sub-category to a main job category causes all jobs associated with the main job category to migrate to the new 2nd level sub-category. Adding the first 3rd level sub-category to a 2nd level sub-category causes all jobs associated with the 2nd level category to migrate to the new 3rd level sub-category.

Edit an existing job category

- When editing, you can only change the job category name.
1. From the navigation bar, click **Administration>Job Categories**.

The Job Categories page opens.

2. In the list beside a job category, click **Edit**.
3. Make changes to the job category name.
4. Click **Save**.

Deactivate an existing job category

- If there are jobs assigned to a job category, you must reassign them before you can deactivate the job category.
1. From the navigation bar, click **Administration>Job Categories**.

The Job Categories page opens.

2. In the list beside a job category, click **Deactivate**.

Job template

A job template contains pre-defined content that populates requisitions and job postings. Job templates are like your own library of canned job descriptions that make creating requisitions and job postings easier.

Create a new job template

- Template Name, Hiring Workflow, and Code fields are required.
 - If you choose a U.S. location, these additional fields are available: EEO-1 Job Category, AAP Job Group.
1. From the navigation bar, click **Administration>Job Templates**.

The Job Templates page opens.

2. Click **Create**.

The Job Template form page opens.

3. Fill out the Job Template form. Some key fields:
 - **Template Name:** The descriptive name of the template displayed to Rival Recruit users but not applicants. Make it descriptive so users can easily understand it.

- **Hiring Workflow:** Select from a list of available workflows. A hiring workflow contains the specific hiring stages relevant to the hiring process/position. If you do not select a hiring workflow, the default workflow is used.
- **Allow Override:** By placing a check mark in the Allow Override check box, users can override the workflow on the selected Job Template and choose a workflow from the list of available workflows.
- **Job Title:** The internal job title for the position.
- **Template Code*:** Your company's unique identifier for this template displayed to Rival Recruit users but not applicants.

Tip: If a template can have multiple values for a certain field, leave the default setting. A recruiter can populate that field on a per job/requisition basis. The Template Code field is often populated with a company's internal job code.

4. Click **Save**.

Edit an existing job template

- If your organization uses an external source (like an HRIS system) to feed job template data, do not edit it here. Edit it in the source system.
1. From the navigation bar, click **Administration>Job Templates**.
The Job Templates page opens.
 2. In the list, click a template name.
The Job Template page opens.
 3. Make your changes.
 4. Click **Save**.

Deactivate an existing job template

- Only active templates are available during the creation of a new job or requisition.
 - Deactivating a template removes it from the available templates lists and search feature on the requisition and job creation/edit pages.
1. From the navigation bar, click **Administration>Job Templates**.
The Job Templates page opens.
 2. In the list, click a template name.
The Job Template page opens.
 3. Click **De-activate**.

Create an approval workflow for a job template

- Defining a job template approval workflow makes it easier to route requisitions and offers for approval because approvers are populated automatically.
 - You can select up to 10 approvers.
1. From the navigation bar, click **Administration>Job Templates**.

The Job Templates page opens.

2. In the list, click a template name.
3. In the Requisition Approvers field, search for and select users or groups who have requisition approver permissions.
4. Arrange the order of approvers.
5. In the Offer Approvers field, search for and select users or groups who have offer approver permissions.
6. Arrange the order of approvers.
7. Click **Save**.

Managing resources and related lists

Resources

A resource allows a recruiter to track the source of an applicant for reporting and management purposes. Rival Recruit supports alternate resources (company websites, job fairs, open houses, etc.) and job boards.

Alternate resources

An alternate resource is any offline source of resumes like job fairs, newspaper ads, employment agencies, and radio/TV ads. Alternate resources are available to anyone manually importing candidate records or editing existing candidate records. Alternate resources are only available in the user interface and are separate from the *how did you hear about us* options in career sites.

Create a new resource

1. From the navigation bar, click **Administration>Manage Resources**.

The Manage Resource page opens.

2. Click  and click **Add resource option**.

The Add Offline Resource page opens.

3. Select a resource type.
4. Enter a resource name. This is the source recruiters see on candidate records and reports.
5. (Optional) Enter the subscription start date, subscription expiration date, and subscription cost.

Tip: Subscription start and expiration date fields do not calculate cost per hire.

6. Click **Save**.

Edit an existing resource

1. From the navigation bar, click **Administration>Manage Resources**.

The Manage Resource page opens.

2. Beside a resource, click  and click **Edit**.

The Edit Resource page opens.

3. Update the fields and click **Save**.

Deactivate an existing resource

- Deactivating an resource ensures that it cannot be selected when importing candidate records.
- 1. From the navigation bar, click **Administration>Manage Resources**.
- 2. Beside a resource, click  and click **De-activate**.

Job boards

A job board is any online job repository where you post job openings to advertise them.

As an administrator, you cannot manage job boards within Rival Recruit. Job boards are managed through Rival Support.

Responsibility for job board accounts

You are responsible for maintaining your job board accounts. Ensure that:

- Posting credits are available for the jobs pushed via Rival Recruit.
- The account is configured correctly and functioning as expected.
- Job board login credentials are kept accurate and up to date in Rival Recruit.

Note: While you can change your job board credentials anytime via the job board, these changes must be replicated in Rival Recruit. Therefore, changes must be communicated to Rival by your designated Rival Recruit administrator. Rival Recruit requires valid job board login credentials to process your posting requests. If the job board login information on file in Rival Recruit is not valid, your jobs cannot be posted. Also, any extension to subscription expiration dates must be communicated to Rival by a designated customer Rival Recruit administrator.

You are also responsible for inputting accurate posting data that includes:

- Providing effective, grammatically correct job descriptions.
- Selecting accurate information when defining the job record within the Rival Recruit user interface.

Rival is responsible for deploying requested postings to configured job board accounts. Rival will ensure that:

- Jobs are posted to job boards exactly as you defined them in Rival Recruit. Rival does not alter job posting content unless a business rule requires us to do so. Business rules assist in mapping Rival Recruit record fields to job board record fields.
- Jobs are typically posted to the job board within two business days. Holidays and weekends are not considered business days and no posting occurs on those days. Whenever possible, Rival queues the job for posting as early as possible prior to the intended posting date.

Note: Rival does not administer or control your job board accounts. Rival Recruit product acts as a tool for posting your jobs on internet job boards. Rival staff members are not authorized to change, renew, or otherwise alter job board account information, even with your permission.

Free job distribution network

Rival Recruit offers free job distribution channels via a standard integration with contracted job board vendors. When you post jobs externally, they are included in each of these partners job listings, which are updated on a nightly basis. With this integration, Rival Recruit customers can expand their reach across countries and industry types for both active and passive job seekers at no additional charge.

The free job distribution network sends your external facing jobs to each job board vendor partner nightly. The feed is only updated once a night and job status updates can take up to 24 hours to show up on job boards.

All customers are automatically opted into the free job distribution partners. To opt out, contact Rival Support.

Supported job boards

These are the supported job boards in the free job distribution network.

Job board	Description
Adzuna	Adzuna is a search engine for job ads that lists every job, everywhere. It searches thousands of websites and provides smarter search options and powerful data about the job market, giving job seekers information they need to take control of their career. Adzuna is supported in these countries: Australia, Brazil, Canada, Germany, France, India, Netherlands, Poland, Russia, South Africa, and United Kingdom.
BetterJobs powered by CareerBuilder	Powered by the might of CareerBuilder, BetterJobs.com lists over a million job openings from multiple sources and makes searching for the right job easy.
CareerJet	CareerJet is a job search engine that maps job offerings available on the internet in one extensive database by referencing job listings originating from job boards, recruitment agency websites, and large specialist recruitment sites. Users can query this database and avoid visiting each site individually. Job offerings are not hosted by CareerJet, and users are always redirected to the original job listing. Careerjet's job search engine network encompasses over 90 countries, featuring separate interfaces that are translated into 28 languages. CareerJet uses smart agents running on a cluster of networked computers to scan the web and identify job listings on the internet. Listings are scanned daily and jobs found are added to the job index. Over 58,000 websites are scanned every day.
DirectEmployers	DirectEmployers is a nonprofit, member-owned and managed association formed in 2001 by 14 leading Fortune 500 companies. The mission of DirectEmployers Association is to provide employers an employment network that is cost-effective, improves labor market efficiency, and reaches a diverse national and international workforce.
Indeed	Indeed Preferred Partnership: Rival and Indeed have partnered to provide customers with a more seamless way to post, sponsor, and apply through Indeed. Indeed Apply empowers candidates to easily apply via any mobile device, while still collecting required pre-screening job questions.

Job board	Description
JobbyDoo	JobbyDoo collaborates with many educational and governmental institutions in the world. It is available in the US, Australia, UK, Germany, France, Italy and Brazil. Key advantages of Jobbydoo.com (USA): ▶ More than 30,000 jobs from hundreds of sources ▶ Fresh, comprehensive job listings organized in an easy-to-use interface ▶ Secure. It is the only job search engine using HTTPS protocol to ensure data protection ▶ Get jobs that match your interests directly in your inbox ▶ Excellent for job seekers, students, and graduates
JobShakers	JobShakers specializes in helping organizations fully engage employers in the recruitment process. The JobShakers app makes simple for today's smart phone dependent workforce to refer friends to open positions. No IT integration is required and the JobShakers dashboard provides reports, analytics, and tracking tools. Simple monthly subscription fees with one year contract based on total number of employees.
Jooble	Jooble (www.jooble.org) operates in 64 countries worldwide and reaches more than 160 million candidates. Jooble simplifies the job-searching process for candidates by displaying thousands of active job ads aggregated from different job boards and recruitment companies. Their primary goal is to help people find the best job in the world.
LinkedIn Limited Listings	LinkedIn aggregates jobs from across the web and surfaces them in their job search results, referred to as Limited Job Listings. With the Limited Listings partnership between LinkedIn and Rival, Rival Recruit customers' externally posted jobs are included in LinkedIn's Limited Listings search results. Rival Recruit customers can also leverage LinkedIn Apply on the Rival career site so that candidates can apply using their LinkedIn profile to streamline the apply process.
LiveCareer	With millions of users per month, the LiveCareer Network represents the world's largest pool of unique candidates looking to build or improve their resume. You can learn more about LiveCareer at their website: https://www.livecareer.com
Monster Controlled Listings	Monster is the global leader in successfully connecting job opportunities and people. Monster uses the world's most advanced technology to help people find opportunities via digital, social, and mobile solutions including monster.com®, their flagship website. Monster also helps employers find the best talent using a vast array of products and services. Monster Controlled Listings include Rival customers' jobs in the Monster job search results.

Job board	Description
Recruit.net	Recruit.net operates a network of multilingual job search engines that enable individuals to find jobs across multiple countries. Job seekers can find jobs from thousands of web sites with a single search. Recruit.net delivers job listings from corporate web sites, job boards, recruitment agencies, and other sources.
Simply Hired	Simply Hired is a vertical search engine company—based in Silicon Valley— that is building the largest online database of jobs on the planet. With Simply Hired, finding your next job is a simple yet effective, enjoyable journey.
Talent.com	With over 30 million jobs available in more than 75 countries, Talent.com is one of the largest sources of employment around the world.
Trovit	Trovit finds job vacancies in thousands of different websites and shows them to you in one place. That way, you can be sure that you will find your dream job, no matter how hidden it is. Easy, convenient and fast.
WayUp	WayUp is the largest website for college students to find part-time jobs and internships, and for recent grads to find full-time entry-level jobs. WayUp database exceeds 3.5 million jobseekers.
WowJobs Canada	WowJobs is Canada's largest and most comprehensive job search engine. (Canada's version of Indeed.) WowJobs pulls from over 6000 different sources and finds jobs in Canada others do not. WowJobs finds about 260,000 jobs across Canada and receives over 3 million visitors per month. WowJobs has unique features such as salary search, RSS feeds, email alerts, and resume posting.
ZipRecruiter	ZipRecruiter is the fastest-growing online employment marketplace. Powered by industry-leading artificial intelligence matching technology, ZipRecruiter connects job seekers with millions of businesses through innovative mobile, web, email services and partnerships with the best job boards on the web. Founded in 2010, Santa Monica-based ZipRecruiter has close to 1000 employees in two states and three countries.

Configure a job board

Job board integration is typically configured during your company's initial implementation, but you can modify your job board integration configuration post-deployment.

If you are still in implementation, contact your Implementation Consultant to get job board integration configured.

If you have deployed Rival Recruit already, contact Rival Support.

Request a new job board

Need a new job board? Contact Rival Support. Send an email request and include the following information for each job board that you are requesting posting integration:

- Request Type: New job board posting request

- Board Name: <name of job board>
- URL: <the URL of the login page on the job board>
- Username: <the username for your job board account>
- Password: <the password for your job board account>
- Mapped Users: Include a list of the recruiting users (First Name and Last Name) to which this job board will be mapped. If a recruiting user is mapped to a job board, any job owned by the recruiting user can be posted to the mapped job board.

Note: Allow up to 5 business days for processing new job board requests.

Remove (deactivate) a job board posting integration

If you are no longer using or maintaining an account with a job board, you can request it to be removed (deactivated).

To request removal of a job board, contact Rival Support. Include the following information:

- Request Type: Job board posting deactivation request
- Board Name: <name of job board>
- Username: <the username for your job board account>
- Reason for deactivation: <a brief explanation of why you want the board deactivated>

Note: Allow up to 5 business days for processing job board integration change requests.

Maintain job board login credentials

A request for an edit to an existing job board should be made if the login credentials for the job board have changed. Contact Rival Support.

Include the following information in the email that you send to Rival Support.

- Request Type: Job board posting login credential change request
- Board Name: <name of job board>
- Username: <the username for your job board account>
- What is being edited: <a description of the changes needed>

Note: Allow up to 5 business days for processing job board integration change requests.

Rival is not responsible for checking your job board login credentials for accuracy. The login credential information must be correct when it arrives at our support center.

If we find, in the course of attempting to post a job to a job board, that the login information on file is invalid, a Data Services team member will send an email to the posting requester indicating that the login credentials are invalid. Posting access to the board will be suspended until valid login credentials are provided. In addition, any pending postings will be removed from the posting queue.

Job board posting permissions

Job Board Posting permissions are maintained via Mapped Users. When you request the addition of a new job board for posting integration, a list of the recruiting users (First Name and Last Name) to which the job board will be mapped should be included in the request. Each job board may have one or more mapped users.

Remember that if a recruiting user is mapped to a job board, any job owned by the recruiting user can be posted to the mapped job board. For example, let's assume that we have three recruiting managers (RMs) on staff:

- RM1 is mapped to Monster and CareerBuilder
- RM2 is mapped to Monster and CareerBuilder
- RM3 is mapped to Monster

RM2 logs in to Rival Recruit to post a job that RM3 owns (i.e. RM3 is the Assigned Recruiter) to a job board. RM2 is presented with only the option to post to Monster and not CareerBuilder because RM3 is only mapped to Monster and jobs owned by RM3 can only be posted to job boards to which RM3 is mapped. This mapping is maintained regardless of the fact that RM2 is performing the posting.

The permission model is based on the mapping of the job boards to the job owner, not based on which user is logged into Rival Recruit.

Posting a job to an internet job board

After job board posting integration has been configured, you can queue a job for posting to an internet job board directly through the Rival Recruit user interface.

Not all job boards operate in the same way. Some boards allow for free postings while others accept pre-payment for postings or charge on a per posting basis. Some boards only allow free postings if the job meets specific criteria. Rival does not control or inform you about a job board's pricing policy. Rival does not provide compensation for such charges when they occur. Ensure you understand a job board's policy before requesting a post.

The user who is creating a new job can select job boards for posting during the last step in the job creation process. The job status must be *Normal* or *External*. The job owner (assigned recruiter) must have one or more mapped job boards to view the list of available job boards.

Note: Invalid job board credentials, lack of posting credits, and technical problems can affect job board posting success. If there is an issue with any of your postings, a Rival representative contacts you to explain the issue. Any issues negate Rival's responsibility to process the job posting within 48 hours.

Post a newly created job to a job board

1. From the navigation bar, click **Jobs>Create Job Posting**.

The Create Job Posting page opens.

Define the Position Details

Define the posting details on the Job Posting form. From this screen general details regarding the job posting are defined. Throughout the form, all required fields are marked in red.

2. If EmployeeReferrals.com integration has been enabled, a section labeled EmployeeReferrals.com will be available.
3. Click **Post to Job Boards**.

The Job Board Postings page opens.

4. Select the individual check box of the job boards you want to post the job or select the All Sites Below check box.
5. Click **Continue**.

The details for the posting are displayed.

6. Make any changes to the details for the posting.
7. Click **Continue**.

A preview of the posting opens

8. Click **Send Posting**.

Note: This will post the job to the requested Job Board(s) in 24 to 48 hours. The job will appear on your internal and/or external job listings page automatically in real-time.

Note: If you are posting to Monster, you have additional steps that need to be completed to post the job. See Additional Steps for posting to Monster RTP.

Post a job that has already been created

1. From the navigation bar, click **Jobs>Job Tracking**.
2. (If applicable) Filter to limit search results.
3. In the results list, click a job title link.
4. Click  and click **Edit This Job**.

The Edit Job Posting - Position Details page opens.

5. Click **Boards** (top of the page).
6. Select the **Post/Repost** check box for each job board you want to post to.
7. From the **Select Header** and **Select Footer** drop-down list, select the headers and footers.
8. From the **Please Select City** drop-down list, select the searchable city.
9. Click **Post to Job Board(s)**.

Note: If you are posting to Monster, you have additional steps to complete to post the job. See Additional Steps for posting to Monster RTP.

Note: Job postings that have already been posted in the past will be reposted with any updated information. Note that some job boards charge you to repost a job. Costs associated with reposting are as per your agreement with the job board and not determined by Rival Recruit.

Rival Recruit is not responsible for any charges incurred by resending a previously posted job through the job posting engine.

Posting to third-party job boards requires that login information for the third-party boards be kept current. Your company administrator must work with Rival Support to maintain and keep job board logins up to date. If a job post has an invalid login on file, we will contact your Rival Recruit administrator.

Post to Monster RTP (additional steps)

1. From the Monster RTP page, select the job board and header, footer and searchable city, then click **Post to Job Board(s)**.
2. From the Job Posting page, click **Continue** to post the selected job to the Monster job board.

Note: Upon clicking on the Continue button you are accessing the Monster.com site.

Note: It is necessary to contact Monster directly with any questions, concerns or issues with the posting form or process. The RTP credentials provided to Rival are not to be used for

recruiting purposes. The credentials are solely intended for Rival Recruit integration with Monster.

The Monster posting form opens.

3. Enter the required information to post the job to the Monster job board. Remember that all required items must be completed to post the job. Specific questions about field usage should be addressed with your Monster support team.
4. Click **Post Job**. The job is posted to Monster in real time; however, it may take up to 75 minutes for the job to display on the Monster site.
5. From the Job Posting result for Monster page, click **Back to Job Listings**.

Job posting headers and footers

The correct use of headers and footers is critical to correctly posting your jobs on job boards.

Header

A header is a block of text added to a posting directly before the start of the job description. It provides a brief company overview to a prospective job candidate.

A header is selected on a per job board basis and only added to the selected job board posting. Headers do not appear on company careers pages.

Rival Recruit supports an unlimited number of headers.

Footer

A footer is a block of text that added to the posting directly after the job description. It is selected on a per job board basis and only added to the selected job board posting. Footers are not displayed on company careers pages.

The footer is the primary method by which a candidate applies for a job. Footers contain a merge string that merges in a job's URL and displays the URL on the job posting when posted to an internet job board.

Rival Recruit supports an unlimited number of footers.

Example: A typical **job posting window** (page 201) in Rival Recruit to CareerBuilder.com.

Avoid including an email address or link to your company's internet home page in the footer because this would route candidates to some place other than Rival Recruit.

Typical job posting page

The text highlighted in yellow is the footer, which can contain a link. When a candidate clicks the link, the candidate is redirected to the same posting on your Rival Recruit careers page to apply.

Job Snapshot	
Location:	2800 Woods Hollow Rd Fitchburg, WI 53711 (Map it)
Other Pay:	Negotiable
Employee Type:	Full-Time Employee
Industry:	Biotechnology
Manages Others:	Yes
Job Type:	Human Resources
Education:	Graduate Degree
Experience:	Up to 10 year(s)
Posted:	4/29/2009
Contact Information	
Contact:	Human Resources
Ref ID:	1099
Description	
We are seeking an experienced, dynamic professional to join our HR Team as the Director, Organizational Development. This position is responsible for identifying, developing and leading innovative solutions to improve employee performance and sustain an environment of continuous learning and best practices in management.	
Requirements	
Ideal Candidates will have . . .	
- Master's degree in Organizational Development - 10+ years experience in Organizational Development, Change Management and Human Resources - Practical experience in creating Performance Management, Continuous Learning, Talent Management and Organizational Effectiveness programs - Ability to translate recommendations into tangible business results - Excellent facilitation, interpersonal and communication skills - Experience in a scientific or high-tech environment	
Click here to apply https://hostedjobs.openhire.com/epostings/submit.cfm?fuseaction=app.jobinfo&id=23&jobid=209061&company_id=15945&version=2. Repeatedly ranked as one of the top 10 places to work in the industry, Promega supports the strength and contribution of the individual. We understand that life is a balance of work, family and personal growth. Promega Corporation is an Affirmative Action/Equal Opportunity Employer.	

Changing headers and footers

Headers and footers are configured during the implementation process based on feedback from the customer implementation lead. If you need to change them, contact Rival Support.

Offer and rejection letter templates

Templates make it easy for recruiters and recruiter managers to create, maintain, and generate candidate offer and rejection letters. Letters are generated in Rich Text (RTF) format, which is a universally recognized standard for formatted documents. Documents in RTF format can be opened in Microsoft Word, WordPad, and other software applications.

Note: Do NOT use Microsoft Word to edit offer/rejection letter templates. Even though RTF files can be edited in Microsoft Word, MS Word adds proprietary formatting that affects merge field functionality. WordPad is the only tool that is supported for creating and editing letter templates.

Using offering letters

- After candidate reviews and interviews are completed, an offer can be extended and managed within Rival Recruit. Recruiters can send offer letters to candidates directly within the system and store pertinent offer/hire information.
- Save time by having customized offer/rejection letters for different business units within your organization. As your company grows, you can choose to add more customized offer/rejection letter templates.

Best practices

Download the Rival templates and make them your own. You can choose to insert merge fields and custom fields; however, you must use the exact fields provided within your own system including appropriate brackets, parenthesis, and other characters.

Merge field examples may include: (Date), (Candidatefirstname), (CompanyName), \$(OFSalary), (ofsalarytype), (JobOwner).

Customize examples may include: Add your company logo, add your own company statement or EEO statements, and change the wording within the templates.

EEO Statement example: "XYZ Company is an Equal Opportunity Employer. XYZ Company does not discriminate based on race, religion, color, sex, gender identity, sexual orientation, age, non-disqualifying physical or mental disability, national origin, veteran status or any other basis covered by appropriate law. All employment is decided based on qualifications, merit, and business need."

View an offer letter or rejection letter template

1. From the navigation bar, click **Administration>Offer/Rejection Letters**.

The Define Letters: Offer and Rejection page opens.

2. In the Current Letters section, select the letter template you want to view.
3. Click **View**.

Delete an offer/rejection letter template

1. From the navigation bar, click **Administration>Offer/Rejection Letters**.

The Define Letters: Offer and Rejection page opens.

2. In the Current Letters section, select a template.
3. Click **Delete**.

Download an offer/rejection letter template (make it your own)

1. From the navigation bar, click **Administration>Offer/Rejection Letters**.

The Define Letters: Offer and Rejection page opens.

2. In the Download Rival Recruit Template section, select a template.
3. Click **OK**.

The Open/Save As window opens with the Save option selected.

4. Click **OK**.

The template is saved as a rich text file (RTF) to your Downloads folder on your computer.

5. Open the file in WordPad and make it your own.

Edit offer/rejection letter templates (with merge fields)

Note: This topic assumes you downloaded an offer or rejection letter from Rival Recruit to your computer.

1. Open WordPad.
2. Click **File>Open**.
3. Locate and select the offer/reject letter template you previously saved to your computer.
4. Click **Open**.
5. Edit the file as desired.
6. After editing the file, use the steps to save the file locally:
 - a. Select **File> Save As**.
 - b. In the File name field remove any extension (such as ".doc") if necessary
 - c. In the Save as Type drop-down list, select **Rich Text Format (RTF)**.
 - d. Click **Save**.

Standard merge fields (system-generated) for offer/rejection letter

Standard merge fields (system-generated) listed in the table below must be contained inside parenthesis to merge into the letter correctly.

Example: (Candidatefirstname), we are glad you accepted our offer as (JobTitle). Your (ofsalarytype) will be \$(OFSalary).

By contrast, custom merge fields do *not* need to be contained inside parenthesis. A mix of standard and custom merge fields can be used.

Example: (Candidatefirstname), we are glad you accepted our offer as (JobTitle) with a salary grade of CustomMergeField1. Your (ofsalarytype) will be \$(OFSalary), and you will be working in the CustomMergeField2 division.

Standard merge field	Description
(BusinessUnit)	business unit assigned to the job
(CandidateAddress)	from candidate contact record
(CandidateCity)	from candidate contact record
(CandidateEmail)	candidate's email address from the candidate profile
(Candidatefirstname)	candidate's first name
(Candidatelastname)	candidate's last name
(CandidateState)	from the candidate contact record
(CandidateZip)	from the candidate contact record

Standard merge field	Description
(CompanyAddress)	customer's company address
(CompanyCity)	customer's company city/address
(CompanyName)	customer's company name
(CompanyState)	customer's company state/address
(CompanyZip)	customer's company postal code/address
(Date)	current date/date letter is generated
(Department)	department associated to the job posting
(HiringmanagerFullname)	full name of the hiring manager assigned to the job the candidate is being hired for and receiving offer letter for
(HiringmanagerFirstname)	first name of the hiring manager assigned to the job the candidate is being hired for and receiving offer letter for
(HiringmanagerLastname)	last name of the hiring manager assigned to the job the candidate is being hired for and receiving offer letter for
(HiringmanagerEmail)	email address of the hiring manager assigned to the job the candidate is being hired for and receiving offer letter for
(HiringmanagerPhone)	phone number of the hiring manager assigned to the job the candidate is being hired for and receiving offer letter for
(JobCity)	city the job is located in
(JobOwner)	assigned recruiter from the job record
(JobState)	state the job is located (Position Location field in offer)
(JobTitle)	posted job title of the job the candidate is being hired for
(OFSalary)	offered salary
(ofsalarytype)	type of offered salary [yearly, hourly, etc.]
(StartDate)	expected start date from offer record

Upload an offer/rejection letter template into Rival Recruit

- After modifying a downloaded offer or rejection letter template, you can upload it into Rival Recruit so you and other users can use it.
 - There is no limit to the number of offer templates that can be uploaded.
1. From the navigation bar, click **Administration>Offer/Rejection Letters**.

The Define Letters: Offer and Rejection page opens.

2. Depending on the type of letter template you're uploading, go to the Offer Letter or Rejection Letter section.
3. Click **Browse** and select a letter template.
4. Enter a name for the letter template. The name is how it is selected in the system.
5. Enter a description for the letter template.
6. Click **Upload Letter Template(s)**.

The template is available for users to select.

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Settings page

Settings

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Candidate Upload Field Controls

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Displayed Job Fields

Administrators and recruiting managers use the Settings page to set various settings that control Rival Recruit.

Email for outages and upgrades

The Email for Outages and Upgrades field has been added to all Rival products. Recruiting users with an Administrator or Recruiting Manager role can control their own contact information for outages and upgrade communication.

Enter contact information for outages and upgrades

- From the navigation bar, click **Administration>Settings**.

The Settings page opens.

- Click the **Email for Outages and Upgrades** link.
- In the Email for Outages and Upgrades box, enter one or more email addresses.
- Click **Save**.

Note: The email address(es) are contacted when there are system outages and upgrades. Separate each address with a semicolon to send to more than one email or use your own distribution list.

Rival Onboard integration

To personalize the onboarding experience for the hire, Rival Onboard requires some background information before it can launch the onboarding process. If your ATS does not, or cannot track all of this information, a recruiter can supply the information in Rival Onboard.

Your ATS requests a security token from Rival Onboard to use in subsequent calls. Rival Onboard validates the security token request and makes sure the new hired employee is not a duplicate.

These are the parameters your ATS should post to Rival Onboard.

Parameter	Description
PartnerKey	A key Rival gives to each partner. Points to that partner's data in a shared database.

SharedSecret	A shared secret used, to along with the RETURN_ADDRESS, to authenticate the request.
LifesuiteCode	A code to identify the Rival Onboard customer that was entered as part of the customer configuration. Rival Onboard validates that it is pointing to the right customer to make sure there has been no misconfiguration.
Class	The class of this service that was entered as part of the configuration. Staging, Prod, Test. Rival Onboard uses this to validate it is pointed to the right class to make sure there had been no misconfiguration.
ATSName	Rival Onboard stores this so that it can be placed in the audit notes.
RecruiterName	Rival Onboard stores this so that it can be placed in the audit notes.
RecruiterID	An ID to identify the recruiter. Reserved for future use.
ATSCandidateID	ID that your ATS will use to identify the newly hired employee. This key must be immutable with respect to the newly hired employee for this job. Rival Onboard uses this ID to determine whether the employee has been already imported. If the candidate were subsequently hired into a different job, Rival Onboard would expect a different ATSCandidateID. Rival Onboard: ▶ Returns this ID, together with the AuthenticationToken when it returns the user to your ATS. ▶ Stores this ID with the employee event. Rival Onboard does not allow two events to be created with the same ATSCandidateID.

Enter Rival Onboard integration information

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Rival Onboard Integration** link.
3. From the Onboarding Integration Status drop-down, select **Enabled**.
4. From the Onboarding Integration Type drop-down, select **Launch Recruiter Lobby** or **Legacy Roll out the RedCarpet**.
5. The RedCarpet Trust fields, RedCarpet URL, Class and LifeSuite Code, are generated after saving.

The RedCarpet Trust information must match what you enter in each field of the Onboarding Integration section.

6. Click **Save**.

Data Element	Description
RedCarpet URL	The base URL for RedCarpet. Will be in the form of https://customer-redcarpet.silkroad.com

Class	The class of the customer instance. Prod, Staging or Test. If your ATS does not support two different staging instances they both can be configured to point to Rival staging instance.
LifeSuite Code	A unique identifier. Your ATS will use this to pass back to RedCarpet on each Roll Out the RedCarpet request. To prevent accidental human error during the provisioning process, RedCarpet will validate that this code corresponds to the customer instance associated with the customer's URL to insure your ATS's customer is rolling out to the correct RedCarpet customer. This code will include a hash so that is hard to guess or accidentally mistype.

Duplicate candidate search

Use this setting to configure your default filter settings to establish how duplicate candidates are identified in your system. This simplifies how duplicate candidate resumes can be searched.

When performing a candidate search, *This is a Duplicate Profile* hyperlink is shown based upon the selected default Candidate Duplicate Search filters.



Job Score N/A **Qualified** ☐ Yes ☐ No **Source** Other source **Recruiter** OpenHire Administrator

What would you like to do with this Candidate? ---- Select an Action --

This is a Duplicate Profile

Candidate **Test Test**
 Edit/View 124 Testing Way
 Jacksonville, Florida 32255
 United States
 test@yahoo.com
 Primary Phone 904.555.5555

Primary Contact test@yahoo.com

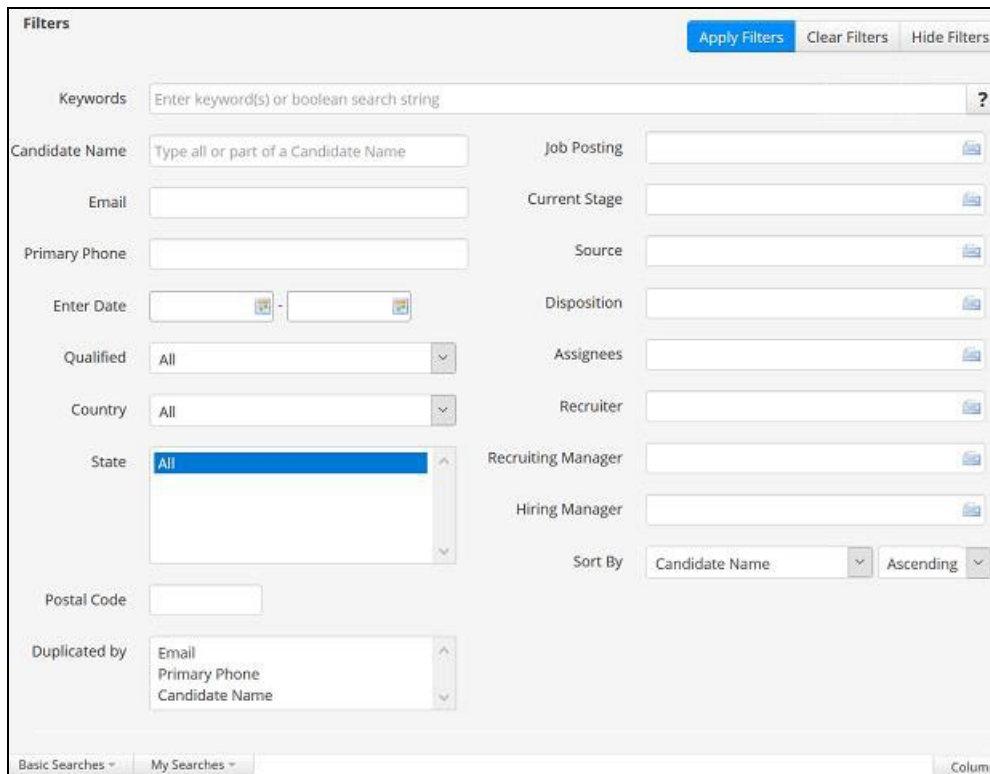
Default Workflow

Preliminary Stages
 Captured Online
 Job Applicant
 Captured Offline

Hiring Stages
 Resume Review
 Interviewing
 Pre-employment

Select a stage to move candidate.

When you click **This is a Duplicate Profile**, the duplicate candidate search results are displayed on the Resumes page. The Duplicated by filter is populated based on what was established on the Settings page.



Select fields for duplicate candidate search

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Duplicate Candidate Search** link.
3. Select the fields the system uses to determine duplicate candidates:
 - Email
 - Primary Phone
 - Candidate Name
4. Click **Save**.

Custom tracking code

Use the Tracking Code Management setting to set your custom tracking code value. You can set the current tracking code number to any number greater than or equal to the current number.

The first requisition or job created will be one digit higher than the tracking code number set in the settings page. There is client side and server side validation to prevent the new tracking code from being set to anything other than a number that is greater than or equal to the current number.

Key info

- Custom tracking code numbers have a maximum of nine digits.

- Once a custom tracking code number is set, you cannot disable it in the future.
- A custom tracking code can only contain numbers.
- Custom tracking code numbers increment by one when new requisitions and jobs are created.
- The custom tracking code number must be higher or equal to the current highest tracking code number.
- As a best practice, you should pad your tracking code number with enough digits to account for the number of jobs you are budgeting for that year.

Set tracking code

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Tracking Code Management** link.
3. Select an Enable Tracking Code option:
 - No means you can set the format of the tracking code by entering it manually.
 - Yes means only the code needs to be set and the system automatically increases it from there.
4. In the Set Tracking Code text box, type a unique tracking code number.
5. Click **Save**.

JobTarget integration

After you have entered into an agreement with JobTarget, any ATS user who can access the Settings page in the ATS sees a JobTarget Integration link. After clicking that link, a new page opens, and the user can enable or disable the JobTarget integration.

Turn on JobTarget integration

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **JobTarget Integration** link.
3. For the Enable JobTarget Integration option, select **Yes**.
4. Click **Save**.

Recruiter-initiated assessments

Customers who have an assessment integration managed via HRNX can choose for Recruiter users to serve up an assessment for individual candidates during the application process rather than every candidate. This means you can administer assessments to only candidates who are being considered for employment and need an assessment completed to move forward.

Turn on recruiter-initiated assessment

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. In the Assessments section, select **Yes**.
3. Click **Save**.

Candidate upload field controls

You can control the requirement setting for some fields that are used for the candidate upload functionality and when editing a candidate profile within the ATS. Those fields include:

- Country
- Address
- City
- State/Location
- Zip/Postal Code
- Email
- Primary Phone
- Resume Content
- Select Source

Set a required field when uploading/editing candidate profile

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Candidate Upload Field Controls** link.
3. Select each **field** (see "**Candidate upload field controls**" on page 212) you want to mark as required when uploading and editing a Candidate Profile.
4. Click **Save**.

Enable cookie policy acknowledgement message

- If you want, you can display a cookie policy acknowledgement message on your *existing* career portal sites.
1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Cookie Policy Acknowledgement for Career Sites** link.

All active career portal sites are listed.

Note: The career portals listed here are *not* the same as the Candidate Experience Career sites.

3. For the career site you want, click **Yes** to enable the cookie policy acknowledgement message.
4. Enter the URL that routes the candidates to the policy.
5. Click **Save**.

The following message displays to applicants who navigate to the career portal.

"Hi! We use cookies on this website to help operate our site and for analytics purposes. For more on how we use cookies and your cookie choices, [go here]! By continuing to use our services, you are giving us your consent to use cookies."

Tip: The [go here] link is the link to the policy that you want candidates to review.

Set resume search options

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Resume Search** link.
3. Enable an option:
 - **Enable OFCCP Compliance for Advanced Search:** When set to Yes, users must enter a reason for their candidate search every time before they are able to run a search. When set to No, users do not have to enter a reason.
 - **Enable OFCCP Compliance for Quick Search:** When set to Yes, users must enter a reason for every quick search they perform. However, if this is not a requirement, then this setting can be set to No, and users will not be forced to enter a search reason when clicking the Go button for a Candidate Quick Search.
 - **Show only resumes in stages before the Hired stage when clicking on the resume count of a job:** When set to Yes, only resumes in stages before the Hired stage are included in the resume count (ex: Resumes column on the Jobs page). When set to No (the default), then all resumes are included in the resume count.
4. Click **Save**.

Turn on the Reviewed Resumes page for hiring managers

- Turning on this setting turns on the Reviewed Resumes page for hiring managers.
 - Hiring managers can use the page to view and deal with resumes assigned to them for review.
1. From the navigation bar, click **Administration>Settings**.
- The Settings page opens.
2. Click the **Resume Search** link.
 3. Set the **Enable Reviewed Resumes page for Hiring Managers** option to **Yes**.
 4. Click **Save**.

Turn on LinkedIn integration

1. From the navigation bar, click **Administration>Settings**.
- The Settings page opens.
2. Click the **LinkedIn Integration** link.
 3. Select (check) the career sites for which you want to enable Apply with LinkedIn.
 4. Click **Save**.

Turn on setting to send salary information in the Indeed nightly feed

- Turning on this setting allows the salary information (entered by users for every active job posting) to be included in the XML file that is sent to Indeed on a nightly basis, which in turn Indeed will post on their end.
- This setting is set to No by default.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Indeed Nightly Job Feed** link.
3. On the pop-up, set the option to **Yes**.
4. Click **Save**.

Set up review request options

- You can determine which attachments—if any—to be automatically selected on the Request a Review page.
 - You can set a default subject line for the Request Review email.
1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Review Requests** link.
3. From the Attachments drop-down, choose an option:
 - **Do not pre-select any attachments:** No attachments are pre-selected. (This is the default.)
 - **Pre-select only the "Resume/CV tab HTML" attachment:** The Resume/CV tab HTML option is pre-selected for every candidate included in the review request.
 - **Pre-select only the primary/original resume attachment:** The primary/original resume is pre-selected for every candidate included in the review request. This is the resume the candidate applied with to the very first job they applied for. If the candidate has since submitted a new/updated resume, then it is not pre-selected when the review request is initiated.
 - **Pre-select all available attachments:** All available attachments are pre-selected when a review request is initiated.
 - **Pre-select only the eForm:** Only the eForms are pre-selected when a review request is initiated.
4. From the Default Email Subject down-down, enter a default email subject line to include in the Review Requests email.
5. Click **Save**.

Select fields to hide when creating requisitions

- You can hide fields that you do not want to appear when creating requisitions.
 - All fields are selected by default—which means they all appear on requisition forms. Uncheck the fields you want to hide.
 - The fields are organized by section—just like on the actual requisition page. If you uncheck all fields in a section, that section header is hidden.
1. From the navigation bar, click **Administration>Settings**.
- The Settings page opens.
2. Click the **Displayed Requisition Fields** link.
 3. For the fields you want to hide, uncheck the **Display** check box.

Tip: You cannot hide required fields.

4. Click **Save**.

Mark fields as required when creating requisitions

- You can mark fields as required so that they must be filled out when creating requisitions.
 - The fields are organized by section—just like on the actual requisition page.
1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Requisition Fields** link.
3. For the fields you want to make required, check the **Required** check box.
4. Click **Save**.

Select fields to hide when creating job postings

- You can hide fields that you do not want to appear when creating job postings.
 - All fields are selected by default—which means they all appear when creating job postings. Uncheck the fields you want to hide.
 - The fields are organized by section—just like on the actual job postings page. If you uncheck all fields in a section, that section header is hidden.
1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Job Fields** link.
3. For the fields you want to hide, uncheck the **Display** check box.

Tip: You cannot hide required fields.

4. Click **Save**.

Mark fields as required when creating job postings

- You can mark fields as required so that they must be filled out when creating job postings.
 - The fields are organized by section—just like on the job posting page.
1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Job Fields** link.
3. For the fields you want to make required, check the **Required** check box.
4. Click **Save**.

Select fields to hide on the requisition approval email

- You can hide fields that you do not want to appear on requisition approval emails.
- All fields are selected by default—which means they all appear on the requisition approval email. Uncheck the fields you want to hide.

- You cannot hide custom or required fields. They are always included in the requisition approval email.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Requisition Approval Fields** link.

The Displayed Requisition Approval Fields page opens.

3. In the Approval Email column, uncheck the fields to hide.

4. Click **Save**.

Select fields to hide on the requisition approval card

- You can hide fields that you do not want to appear on requisition approval cards on the Task List.
- All fields are selected by default—which means they all appear on the requisition approval card. Uncheck the fields you want to hide.
- You cannot hide custom or required fields. They are always included in the requisition approval card.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Requisition Approval Fields** link.

The Displayed Requisition Approval Fields page opens.

3. In the Approval Card column, uncheck the fields to hide.

4. Click **Save**.

Select fields to hide on the offer approval email

- You can hide fields that you do not want to appear on offer approval emails.
- All fields—except Required Experience and Required Skills—are selected by default. Uncheck the fields you want to hide.
- You cannot hide custom or required fields. They are always included in the offer approval email.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Offer Approval Fields** link.

The Displayed Offer Approval page opens.

3. In the Approval Email column, uncheck the fields to hide.

4. Click **Save**.

Select fields to hide on the offer approval card

- You can hide fields that you do not want to appear on offer approval cards on the Task List.
- All fields—except Required Experience and Required Skills—are selected by default. Uncheck the fields you want to hide.

- You cannot hide custom or required fields. They are always included in the offer approval card.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Offer Approval Fields** link.

The Displayed Offer Approval Fields page opens.

3. In the Approval Card column, uncheck the fields to hide.

4. Click **Save**.

Select fields to hide on Move Resume and Edit Offer Information pages

- You can hide system fields that you do not want to appear on the Move Resume and Edit Offer Information pages.
- All fields are selected by default—which means they all appear on the Move Resume and Edit Offer Information pages. Uncheck the fields you want to hide.
- The fields are organized by section. If you uncheck all fields in a section, that section header is hidden.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Offer Information Fields** link.

3. For the fields you want to hide, uncheck the **Display** check box.

Tip: You cannot hide required fields.

4. Click **Save**.

Mark fields as required on Move Resume and Edit Offer Information pages

- You can mark fields as required so that they must be filled out when moving a resume and editing offer information.
- The fields are organized by section.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Offer Information Fields** link.

3. For the fields you want to make required, check the **Required** check box.

4. Click **Save**.

Select fields to hide on the Edit Hiring Information page

- You can hide system fields that you do not want to appear on the Edit Hire Information page.
- The Edit Hiring Information page is accessible by clicking the Modify Hiree Information link on a hired employee's candidate profile.
- All fields are selected by default—which means they all appear on the Edit Hire Information page. Uncheck the fields you want to hide.

- The fields are organized by section. If you uncheck all fields in a section, that section header is hidden.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Hire Information Fields** link.
3. For the fields you want to hide, uncheck the **Display** check box.

Tip: You cannot hide required fields.

4. Click **Save**.

Mark fields as required on the Edit Hiring Information page

- You can mark fields as required so that they must be filled out the Edit Hiring Information page.
- The Edit Hiring Information page is accessible by clicking the Modify Hiree Information link on a hired employee's candidate profile.
- The fields are organized by section.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Displayed Hire Information Fields** link.
3. For the fields you want to make required, check the **Required** check box.
4. Click **Save**.

Remove reply-to email address from system emails

- The Enable Reply-To Address setting controls whether the reply-to email address is included in the email header of system emails.
- This setting is selected by default, which means the reply-to email address is included in the email header of every system email. Unchecking it removes the reply-to address from *some* system emails.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Email Settings** link.
3. Uncheck **Enable Reply-To Address**.
4. Click **Save**.

The reply-to email address is removed from these emails:

- Create new user
- Update user
- Account confirmation emails
- Resend user confirmation email
- Forgot Password

- Accept Interview
- Decline Interview
- Offer approval request emails and requester copy
- Locked account email
- Offer approval
- All req review and approval related emails
- Profile password change
- Edit interview request
- Candidate interview complete
- Candidate review complete
- Job offer review and approval
- Change job owner
- Change job Recruiting Manager
- Post job (or post req as job)
- Interview request
- Candidate self-withdraw
- Thank you, Agency
- Change candidate email

Select users to receive eForm completion notification emails

- Use this setting to determine who receives a notification email when an applicant completes an eForm.
 - You select by role rather than individual users.
 - Recruiter is selected by default for all available eForms.
1. From the navigation bar, click **Administration>Settings**.
The Settings page opens.
 2. Click the **eForm Notification Email** link.
 3. For a specific eForm, select role(s).
 4. (Optional) Click (check) the **Attach eForm** check box if a PDF version of the completed form should be attached to emails.

Tip: The eForm may contain sensitive and personally identifiable information (PII). You may not want to expose that information outside of the system.

5. Click **Save**.

Lock job template fields

- You can lock fields to be read-only so that users creating a requisition or job posting cannot change the value that was selected or entered on the job template.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Locked Job Template Fields** link.
3. Click (check) the fields to lock (make read-only).
4. Click **Save**.

Lock offers to prevent editing during approval process

- Locking prevents any edits from being saved while an approval process is ongoing. (The Update button is removed from the Modify Offer Information page.)
- An approval process is considered ongoing as soon as the first approval request email is sent.
- If any edits need to be made to offers, all approvers must be removed from the approval process. After that, the Save and Save and Route for Approval buttons are available again.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Lock Offers** link.
3. For the Lock All Offer Fields During Approval Process option, click **Yes**.
4. Click **Save**.

Lock requisitions to prevent editing during approval process

- Locking prevents any edits from being saved while an approval process is ongoing. (Save and Save and Route for Approval buttons are removed from the Edit Requisition page.)
- An approval process is considered ongoing as soon as the first approval request email is sent.
- If any edits need to be made to requisitions, all approvers must be removed from the approval process. After that, the Save and Save and Route for Approval buttons are available again.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Lock Requisitions** link.
3. For the Lock All Requisition Fields During Approval Process option, click **Yes**.
4. Click **Save**.

Set available hiring stages by role

- You can set the hiring stages that recruiting managers, recruiters, and hiring managers can move candidates to.
- By default, the recruiting manager and recruiter roles have all hiring stages for all workflows assigned to them. The hiring manager user role does not have hiring stages assigned by default.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Hiring Stages** link.

The Hiring Stages page opens.

3. Select a role.
4. Select a workflow.
5. Select the hiring stages this role can send candidates to.

Tip: Use the Ctrl key to select multiple, non-sequential stages or the Shift key to select multiple, sequential stages.

6. Click **Save**.

Set evergreen job postings setting

- This setting controls which hiring stages (and applicants tied to the original evergreen job posting) are moved to the cloned evergreen job.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Evergreen Job Postings** link.
3. Select a workflow.
4. Select the hiring stages to move to the cloned evergreen job posting.

Tip: Hold down the Ctrl key to select multiple stages.

5. Repeat steps 3 through 4 for any other workflows you may have.
6. If you want every outstanding resume review to carry over with the candidate to the newly cloned job posting, check the **Update any outstanding resume reviews requests with the information of the cloned job posting** check box. If you leave the box unchecked, outstanding resume review requests are *not* carried over to the newly cloned job posting and any review requests will need to be re-initiated.
7. Click **Save**.

Turn on the remote job location functionality

- Turning on this setting enables the **remote job location functionality** (see "**Remote job location**" on page 79).

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Remote Job Location** link.
3. On the pop-up, set the option to **Yes**.
4. Click **Save**.

EEO/AA Info

Settings in the EEO/AA Info link control various aspects of EEO/AA.

Enable a non-binary option for candidate gender question

- Enabling the setting adds non-binary as an option to the "What is the candidate's gender?" question when editing a candidate's EEO/AA Profile.

- This setting does not control the non-binary option in Candidate Experience career sites.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **EEO/AA Info** link.
3. Set the Show Non-Binary option for the "What is the candidate's gender?" question to **Yes**.
4. Click **Save**.

Turn on the veteran icon

- Turning on this setting displays the veteran icon  beside a candidate's name on the Resumes page and candidate profile if that candidate is a U.S. military veteran.
- The system identifies a U.S. military veteran by the answers the applicant provided for the veteran status questions during the application process or provided later by a Rival user.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Icon for Veteran Candidates** link.
3. On the pop-up, set the Icon for Veteran Candidates option to **Yes**.
4. Click **Save**.

Turn on automatic job posting status change rules

- Turning on this setting allows a permissioned user to set rules to automatically change the job posting status on **job postings** (see "**Add a rule to automatically change job posting status**" on page 74).

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Automatic Job Posting Status Change** link.
3. On the pop-up, set the option to **Yes**.
4. Click **Save**.

Turn on Rival Copilot

- Rival Copilot is turned on by default and is available to all users. However, if it was turned off and you want it back, an administrator can turn it back on.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Under the AI and Machine Learning section, click the **Rival Copilot** link.
3. On the pop-up, set the option to **Yes**.
4. Click **Save**.

Turn off Rival Copilot

- Rival Copilot is turned on by default and is available to all users. An administrator can turn it off.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Under the AI and Machine Learning section, click the **Rival Copilot** link.
3. On the pop-up, set the option to **No**.
4. Click **Save**.

Turn on automatic disposition for hired candidates

- Often a candidate applies to multiple jobs. This setting controls whether the disposition selected below is automatically assigned to a candidate's other applications after the candidate is moved into the 'Hired' hiring stage (or whatever is the equivalent in your site).
- When this setting is enabled, the Disposition drop-down that displays when you click the Edit button under the Summary tab on the Candidate Resume Profile page is hidden. Therefore, any user who should be able to disposition candidates after this rule is enabled must have the Disposition Candidate permission assigned their user account.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Disposition for Hired Candidates** link.
3. Set the Enable Automatic Disposition option to **Yes**.
4. From the Disposition drop-down, select the disposition to assign to a candidate's other applications once they are moved into the 'Hired' hiring stage.
5. Click **Save**.

Tip: If a disposition is already assigned to a candidate's application, then it is not changed. The system does not override an existing disposition with an automatic disposition.

Turn on automatic disposition for candidates ineligible for hire/rehire

- Often a candidate applies to multiple jobs. You can select a disposition to assign to each of the candidate's other applications once that candidate has been assigned the disposition that marks them as ineligible for hire or rehire on one of their applications.
- When this setting is enabled, the Disposition drop-down that displays when you click the Edit button under the Summary tab on the Candidate Resume Profile page is hidden. Therefore, any user who should be able to disposition candidates after this rule is enabled must have the Disposition Candidate permission assigned their user account.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Disposition Candidate As Ineligible for Hire/Rehire** link.
3. Set the Enable the rule below option to **Yes**.
4. From the *When this disposition is assigned to an application* drop-down, select the disposition that indicates the candidate is not eligible for hire/rehire.

5. From the *Then assign this disposition to all other applications* drop-down, select the disposition to be automatically assigned to all of the candidate's other applications after the disposition selected in the *When this disposition is assigned to an application* drop-down is assigned to the candidate.
6. Click **Save**.

Tip: If a disposition is already assigned to a candidate's application, then it is not changed. The system does not override an existing disposition with an automatic disposition.

User accounts

Roles

Roles control what users can do in Rival Recruit. Roles control:

- Access to Rival Recruit functionality
- Availability of navigation menu items and command buttons

Users are assigned to a role when they are added to the system. The number of users that can be added to each role is controlled by product licensing.

An administrator or recruiting manager can assign or change a user's role.

Role	Description	Functions
Recruiting Manager	This role is for users who need the highest level of system access.	▶ Access/manage <i>all</i> jobs, requisitions, and candidates in the system ▶ Create requisitions ▶ Post jobs ▶ Create and run reports ▶ Perform administrative functions
Recruiter	This role is for users who perform recruiting duties and only need access to the data assigned to them. Note: Some customers use a Hybrid Hiring role. It's a customized role that has the same permissions as the Recruiter role except there is no job posting or editing access. The role is used when there is a central recruiting group that controls job postings, and hiring managers recruit and manage their candidates autonomously for the central recruiting group.	▶ Access/manage jobs, requisitions, and candidates <i>assigned</i> to them ▶ Create requisitions ▶ Post jobs ▶ View some reports

Role	Description	Functions
Hiring Manager	This role is for users who perform hiring duties (candidate review, interview feedback) but need minimal system access otherwise.	▶ View own candidates, jobs ▶ Create requisitions ▶ View some reports
Administrator	This role is for users who should not have access to candidate data but may assist the recruiting department with program administration.	▶ Create requisitions ▶ Post jobs ▶ Create and run reports ▶ Perform administrative functions
Executive/Reports	This role is for users who need full visibility to review the status of jobs and run reports. The role does not provide access to individual candidate records and provides no editing capabilities.	▶ Run reports
Employee	This role is for users who are not involved in the day-to-day recruiting and hiring process of candidates but are involved in the approval process.	▶ Have requisition and offer approval ▶ No other system access or functions

For more information about user roles and what they can do, check out the ***user permission matrix***.

Assign a role to a user

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. In the data grid, click the name the user you want.
3. In the Role list, select a role.
4. Click **Update User**.

Change a user's role

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. In the data grid, click the name of the user you want.
3. In the Role list, select a role.
4. Click **Update User**.

User permissions

Roles do most of the heavy lifting in Rival Recruit, but additional permissions can be granted to users to expand or restrict their capabilities.

Administrators and recruiting managers assign these user permissions on a user's Users Account page.



Role * Administrator [Roles missing?]

Permissions [Select All](#) [Deselect All](#)

- Configure Candidate Experience
- Disposition Candidate
- Launch Recruiter Lobby
- Offer Approvers
- Purge Recycle Bin

Permission	Description
Activate Jobs	Allows an admin, recruiter manager, or recruiter to activate jobs.
Configure Candidate Experience	Allows user to configure Candidate Experience (if implemented)
Create Job Posting	Allows user to create job postings
Deactivate Jobs	Allows an admin, recruiter manager, or recruiter to deactivate jobs
Disposition Candidate	Allows user to disposition candidates
Edit Requisition Approval	Allows a user to edit a requisition approval
Export Fee Agency Search Results	Allows user to export fee agency search results
Export Job Search Results	Allows user to export job search results
Export Resume Search Results	Allows user to export resume (candidate) search results
Launch Recruiter Lobby	Allows user to launch Recruiter Lobby (if implemented)
Manage Report Access	Turns on the Manage Report Access menu option so that the user can manage the reports that a role can access
Modify Hiree Information	Allows the user to modify hiree information (<i>Modify Hiree Information</i> link available on candidate profile)
Modify Offer Information	Allows the user to modify offer information (<i>Modify Offer Information</i> link available on candidate profile)
Offer Approvals	Allows user to approve offers
Participate in conversations with candidates	Allows user to view and send text messages using the texting feature. Also enables the inbox icon in the header.
Purge Recycle Bin	Allows user to purge the recycle bin
Requisition Approvals	Allows user to approve requisitions
Remove disposition	Allows user to remove a candidate's disposition

Permission	Description
Settings Access	Allow access to the Settings tile where you can set various Rival Recruit settings
Source Passive Candidates	Turns on the source passive candidates feature for the users.
View conversations with candidates	Allows user to view but not send text messages using the texting feature.

Administer User Accounts page

Administer User Accounts

Edit User Information Below.

Active Status

Active

First Name *

Aruna

Last Name *

Lehma

Phone

Email Address *

Aruna.devtraining@mailinator.com

Username *

Aruna

Single Sign-on ID

aruna

Role *

Recruiting Manager

Permissions

[Select All](#)
[Deselect All](#)

Configure Candidate Experience

Disposition Candidate

Manage Report Access

Offer Approvers

Source Profile Pin

Active Status

The status of the user (Active or Inactive).

**First Name**

The first name of the user.

Last Name

The last name of the user.

Phone

Enter the phone number for the user.

Email Address

The email address to which all Rival Recruit email communication will be sent.

Username

The username that the user will use to log in to the system. Usernames must be unique. Since all our customers access through the same login screen, common usernames like 'jsmith' are probably taken already. If you attempt to add a new user and the username is already taken, a notification is displayed on-screen and you will need to select a different username. We suggest using the user's email address as the username since this is likely to be unique in our system. Usernames must be between 6 and 50 characters long and can include alpha, numeric and the following symbol characters: - _ () ~ \$ @ +

Single Sign-on ID

(If using Single Sign-on) Enter the user's Single Sign-on ID.

Employee ID

A unique identifier for the user. This ID number is sometimes used in system integration. For example, a customer can associate the user record in Rival Recruit with a user in an internal HR system. The value must be between 1 and 50 characters. This field is optional if Rival Recruit is NOT integrated with another system.

Role

Select the user role.

Permissions

Select the permissions for the user.

Single Sign-on

Select to use SSO or not.

Locations

Optionally choose to limit user visibility by associating the user with a specific location(s) using the drop-down menu. Use the Ctrl key to select multiple locations. Use the check box to allow the user visibility into jobs and candidates that are not associated to defined company locations.

Activation

New users will be sent an email containing the username and a unique link to reset their password upon initial login. If the new user does not respond to this email, the administrator can re-send the activation email upon clicking Resend Activation Email when editing the user account.

Add a new user

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. Click  and then click **Add User**.

The Create A New User page opens.

3. Assign a status.
4. Enter user's first and last name, phone number, and email address.
5. Enter a user name.

This is what a user uses to log into the system. Each user name must be unique. User name must be between 6 and 50 characters long and can include alpha, numeric, and these characters: - _ () ~ \$ @ +

6. (If applicable) If you use Single Sign-On (SSO), enter a user name. This is the user name the user uses to log into all your supported SSO Rival products.
7. (If applicable) Enter an employee ID.

This ID number is sometimes used in system integration. For example, a customer can associate the user record in Rival Recruit with a user in an internal HR system. The value must be between 1 and 50 characters. This field is optional if Rival Recruit is NOT integrated with another system.

8. Select a role and permissions.
9. Select whether you use Single Sign-On (SSO).
10. Select location information.
11. (If applicable) If a user's role is recruiting manager, you can limit user visibility for jobs/candidates by associating specific location(s). And, if applicable, use the check box to allow user visibility into jobs/candidates not associated to specific company locations.
12. Click **Create User**.

New users are sent an initial email with their user name and a link to update their password.

Edit a user account

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. In the list, click a user name.

The Administer User Accounts page opens.

3. Make your changes.
4. Click **Update User** to save your changes.

Edit multiple user accounts (bulk update)

- You can make bulk updates when managing user accounts.
- Bulk updates include adding/removing permissions and activating/deactivating users.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. Select the individual check box of the users or select the top check box to select all users.
3. From the Take Action list, select an action and click .
4. On the confirmation pop-up, click **Continue**.

Associate company locations to a user

- You can limit a user's ability to view jobs by associating company locations.
- A user associated with specific company locations can only view and manage jobs associated with those locations.
- Users are not associated with any company locations by default, which means they will *not* have full visibility and management over the entire job/candidate database.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. In the list, click a user name.

The Administer User Accounts page opens.

3. In the Location(s) section, select company locations.
4. Click **Update User**.

Change the time zone on a user account

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. In the list, click a user name.

The Administer User Accounts page opens.

3. In the Location Information section in the Time Zone field, select a time zone.
4. Click **Update User**.

Add Recruiter Lobby permission to a user

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take Action list, select **Add Permissions** and click .

The Add Permissions page opens.

5. Select **Launch Recruiter Lobby** from the list of permissions and click **Continue**.

Assign user permission to change hiring stage

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select the Change Hiring Stage permission.
6. Click **Continue**.

Assign user permission to disposition candidate during a review request

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select the Disposition Candidate permission.
6. Click **Continue**.

The user can now disposition a candidate from the candidate resume profile during a review request.

Show Modify Hiree Information link on candidate profile

- By default, this permission is selected for all recruiting managers and recruiters. You do not have to assign permissions to them.
- For all other users who you want to have this permission, you must assign it. This topic shows you how.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select the Modify Hiree Information permission.
6. Click **Continue**.

The Modify Hiree Information link is now available on candidate profiles for this user.

Remove Modify Hiree Information link from candidate profile

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To remove permissions from multiple users, click the check box beside each user. To remove from all users listed, click the check box in the heading column.

4. From the Take action list, click **Remove Permissions** and click .

The Remove Permissions page opens.

5. Select the Modify Hiree Information permission.
6. Click **Continue**.

The Modify Hiree Information link is no longer available on candidate profiles for this user.

Show Modify Offer Information link on candidate profile

- By default, this permission is selected for all recruiting managers and recruiters. You do not have to assign permissions to them.
- For all other users who you want to have this permission, you must assign it. This topic shows you how.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select the Modify Offer Information permission.

6. Click **Continue**.

The Modify Offer Information link is now available on candidate profiles for this user.

Remove Modify Offer Information link from candidate profile

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To remove permissions from multiple users, click the check box beside each user. To remove from all users listed, click the check box in the heading column.

4. From the Take action list, click **Remove Permissions** and click .

The Remove Permissions page opens.

5. Select the Modify Offer Information permission.
6. Click **Continue**.

The Modify Offer Information link is no longer available on candidate profiles for this user.

Assign user permission to approve requisition or offer

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select the Offer Approvers or Requisition Approvers permission (or both).
6. Click **Continue**.

Assign user permission to view text conversations

- This topic tells you how to assign the view text only permission. That permission gives users the ability to view texts but not send them.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .
- The Add Permissions page opens.
5. Select **View conversations with candidates** from the list of permissions and click **Continue**.

Assign user permission to view and send text messages to candidates

- This topic tells you how to assign the view and send texts permission. That permission also enables the inbox icon (in the header next to user avatar).
1. From the navigation bar, click **Administration>User Accounts**.
 - The User Accounts page opens.
 2. (If applicable) Filter to limit search results.
 3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .
- The Add Permissions page opens.
5. Select **Participate in conversations with candidates** from the list of permissions and click **Continue**.

Assign user permission to create job postings

- Assigning this permission to a user gives them the ability to create job postings.
1. From the navigation bar, click **Administration>User Accounts**.
 - The User Accounts page opens.
 2. (If applicable) Filter to limit search results.
 3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .
- The Add Permissions page opens.
5. Select the Create Job Posting permission.
6. Click **Continue**.

Assign user permission to source passive candidates

- Assigning this permission to a user turns on the source passive candidates feature.
- Recruiting managers and recruiters have this permission by default so you don't have to do anything.

- If you want hiring managers or other users to have the source passive candidates feature, follow the steps in this topic.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select the Source Passive Candidates permission.
6. Click **Continue**.

Password rules

One of the most important ways to ensure that your Rival Recruit site is safe and secure is to have strong password rules. Client administrators work with Rival Support to determine password rules and then Rival Support configures them.

Password rules to consider:

- Maximum length
- Minimum length
- Require mixed case
- Require numeric
- Require special characters
- Restrict email address from being used as password
- Restrict user ID from being used as password
- Restrict user name from being used as password
- Password history (how many new passwords a user has to create before a previous password can be reused)
- Determine after how many days the password needs to be reset by every ATS user (value of 0 means it never expires)
- Determine how many days prior to the password expiration date the system sends a reminder email to users to remind them to change their password. The email is sent daily until the user changes the password or the password expires.

Interview Scheduling

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Interview Scheduling

With Interview Scheduling, you can simplify and automate interview scheduling to speed time to hire and differentiate the candidate experience. Spend minutes not hours coordinating availability and scheduling interviews.

Key advantages:

- Simplifies scheduling, rescheduling, and canceling of interviews
- Allows Rival Recruit users to set preferred availability
- Reduces the likelihood of no-shows
- Differentiates the candidate experience with enhanced flexibility and self-service tools
- Creates automatic interview confirmation email and calendar invite
- Automatically syncs calendar upon scheduling

Interview Scheduling is a purchased feature.

Limitations

This version of Interview Scheduling has these limitations:

- The History tab does not track entries for scheduling an interview or sending an email to a candidate.
- After an interview is scheduled, the action in the *What would you like to do with the candidate?* drop-down still shows Schedule an Interview.
- The interview organizer does not get a scheduling confirmation email even if they are one of the attendees.
- After an interview is scheduled and the confirmation screen is closed, the only way to cancel is through available actions in the calendar.
- If your company's mail server is behind a VPN or firewall or has strict MDM policies in place, we may not be able to support connecting your accounts/calendars.

Future releases will address these current limitations.

Interview Scheduling setting

Interview Scheduling

The legacy interview scheduling pages are no longer needed when using our latest functionality. Once all users have completed the interviews that were scheduled using our legacy functionality, the links to those legacy pages can be hidden by selecting "No" below.

- "Interview Requests" link in the left-hand navigation
- "Interview Status" link in the left-hand navigation
- "My Scheduled Interviews" chart on the Recruiter dashboard
- "My Interview Requests" column on the Jobs page
- "Interview Requests" column on the Jobs page

Show Legacy Interview Scheduling Pages

☐ Yes
 ☒ No

Close

Save

When you are ready to use the new interview scheduling functionality, hide the legacy interview scheduling pages via the Show Legacy Interview Scheduling Pages option. If you:

- Never used or stopped using legacy interview scheduling (and have no scheduled interviews currently in flight), you can hide those legacy pages/sections immediately.
- Currently use legacy interview scheduling and have interviews currently in flight, keep the legacy pages/sections until all in-flight interviews are completed and then hide those pages.

Hide (turn off) legacy interview scheduling

- Hiding (turning off) legacy interview scheduling hides all its integration points in Rival Recruit.
- If you are currently using legacy interview scheduling, wait until all in-flight interviews are completed before hiding legacy interview scheduling pages.

1. From the navigation bar, click **Administration>Settings**.

The Settings page opens.

2. Click the **Interview Scheduling** link.

The **Interview Scheduling Settings page** (see "**Interview Scheduling setting**" on page 237) opens.

3. Set the Show Legacy Interview Scheduling Pages option to **No**.
4. Click **Save**.

Setting up Interview Scheduling

Each user who wants to use Interview Scheduling (the new interview scheduling feature) must perform some set up tasks:

- Link work calendar

- Set preferred availability (optional)

Link work calendar

- You must link your work calendar to be eligible for selection as an attendee/interviewer for an interview.
 - Linking your work calendar requires that you select the Microsoft email system that your company uses. The supported email systems are Microsoft Office 365 (cloud-based), Microsoft On-Premise Hybrid, and Microsoft On-Premise.
 - After your calendar is linked, the system can retrieve your free/busy time, which ensures interviews are not scheduled when you are unavailable.
1. From the header, click your user avatar, then click **My Account**.
 2. Scroll to the Interview Scheduling section.
 3. Click **Set Availability**.
 4. Follow the steps on pages 5 through 11 in the *Admin Guide for Setting Up Interview Scheduling and Texting Functionality* at this link: <https://chilp.it/a0a4b49>

Tip: Here is a helpful link for your IT team if you encounter problems linking your work calendar: <https://chilp.it/868a74e>

Set preferred availability

- Setting availability sets a *preferred* window of availability for interviews—beyond what the calendar shows as free/busy.
 - This is an optional setup step. If you do not set preferred availability, the system uses the default of Monday-Friday 8 am-5 pm.
 - You can set one time block or multiple time blocks per day but time blocks cannot overlap.
 - Input a time block for every weekday you want to be available. If you do not set a time block on a weekday, the system processes that as you not being available at all on that day.
 - The time blocks you set reoccur on a weekly basis.
1. From the header, click your user avatar, then click **My Account**.
 2. Scroll to the Interview Scheduling section.
 3. Click **Set Availability**.

The Set Availability page opens.

Set Availability

If you would like to specify a window of availability to conduct interviews, beyond what the calendar shows as free/busy, please include the times you would like to participate in interviews below.

Select Primary Calendar

Calendar

Select Primary Calendar

Select Availability Slots

Day

None

Select Weekday

From

None

Select Start Time

To

None

Select End Time

+

Current Selected Slots

Day	From	To	Action
Monday	9:00 AM	3:00 PM	
Tuesday	8:30 AM	11:30 AM	
Wednesday	10:00 AM	4:30 PM	
Thursday	9:00 AM	4:00 PM	
Friday	10:00 AM	2:00 PM	

SAVE

CANCEL

4. From the Calendar drop-down list, select the calendar you linked.
5. Create time blocks for each weekday when you are available for interviews:
 - a. From the Day drop-down list, select a weekday.
 - b. From the From drop-down list, select a start time.
 - c. From the To drop-down list, select an end time.
 - d. Click  .

The time block is added to the Current Selected Slots list.
 - e. Repeat steps a through d for each time block you want to add.
6. Click **Save**.

Schedule an Interview page

Schedule an Interview

Title

Interview for Business Systems Analyst - Chan Croftchik

From Date

August 22nd

To Date

August 31st

Duration

15 min

☒ Let recipient select the time

Organizer

Susan Harris

Attendees

Alex Kuehl

Michael Baxter

Description

We look forward to talking to you, Chan.
Please call (555) 555-5555 for your interview.
Thank you!

Please note that any text entered here will be visible to all parties involved in this meeting, including the candidate, as it will be displayed in the meeting confirmation email.

SCHEDULE

Use this page to schedule an interview. It is available to users who linked their work calendars to interview scheduling.

Fields

Title

Pre-populated and includes the names of the job the candidate will be interviewing for and the candidate's full name. You can edit this field.

From Date

Pre-populated with the current date. To change date, click and select a new date from the calendar pop-up.

To Date

Pre-populated with the current date. To change date, click and select a new date from the calendar pop-up.

Duration

Select the expected duration of the interview. (Default is 15 minutes.)

Let recipient select the time

Controls whether you set the date and time for an interview or the candidate does.

If toggle is disabled (default setting), you set the date and time for the interview.

If toggle is enabled, the candidate sets the date and time for the interview.

Organizer

An organizer can reschedule an interview and change interview meeting information. Defaults to the logged-in user but you can select a different organizer.

Attendees

Add all internal employees who need to interview the candidate. This is a type ahead field so as you type a name, it appears as an option in the drop-down. Click the name to add as an interviewer/attendee.

Tip: Only employees who have linked their calendar can be selected as an attendee/interviewer.

Description

This is a free text field. Include any information to share with the attendees here like links, phone number for candidate to call, office location, and so on.

Tip: Whatever is entered here is visible to the candidate.

Schedule an interview

1. Access a candidate's candidate profile.
2. From the Select an action drop-down list, click **Schedule an interview**.

The **Schedule an Interview page** (page 240) opens.

3. Select a date range from which to select an interview date.
4. Select the expected duration of the interview.

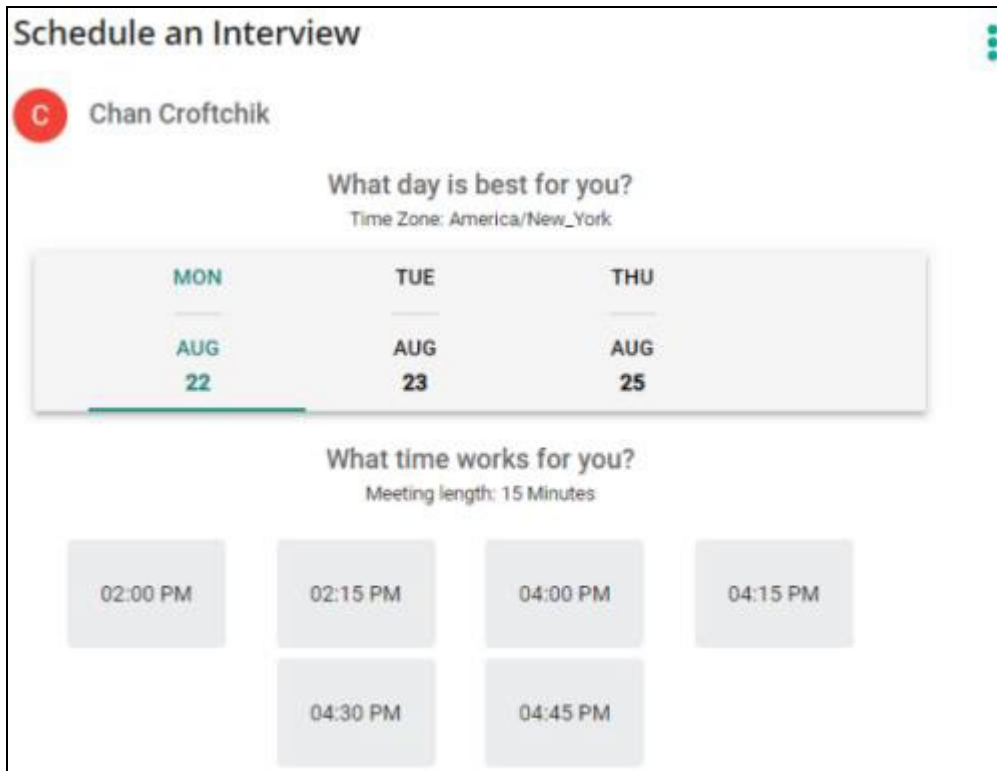
Note: The default is 15 minutes.

5. Determine who sets the date and time for the interview. If the Let recipient select the time toggle is:
 - Disabled, you set the date and time for the interview. (Default)
 - Enabled, the candidate sets the date and time for the interview.
6. Select all internal employees who need to interview the candidate.

Tip: The Attendees field is a type-ahead field. As you type a name, it appears in the drop-down for selection. Only employees who have linked their calendar can be selected.

7. Enter a description for the interview. Include any information to share with the attendees here like links, phone number for candidate to call, office location, and so on. (Whatever is entered here is visible to the candidate.)
8. Click **Schedule**.

The Schedule an Interview - Date and Time page opens:



Schedule an Interview

C Chan Croftchik

What day is best for you?
Time Zone: America/New_York

MON	TUE	THU
AUG 22	AUG 23	AUG 25

What time works for you?
Meeting length: 15 Minutes

02:00 PM	02:15 PM	04:00 PM	04:15 PM
	04:30 PM	04:45 PM	

9. Select a date and time and click **Schedule**.

The interview is scheduled and a confirmation goes to you and the candidate.

An email is sent to you, every selected attendee/interviewer, and the candidate.

The calendar of every selected attendee/interviewer is updated and the meeting is automatically added to their calendar.

Note: The candidate's calendar is not automatically updated because their calendar is not synced to the scheduling function. However, an ics calendar attachment is included in the email that is sent to the candidate.

Interviews page

Interviews

Organizer
Susan Harris

Attendee

From Date
April 13th

To Date
April 19th

INTERVIEW

Interview for Payroll Specialist - Taylor Porter

Tuesday, April 13th
10:00 AM - 10:30 AM EDT (30 mins)

Organizer: Susan Harris

EXPAND DETAILS

INTERVIEW

Interview for District Sales Manager - Christopher L Bond

Wednesday, April 14th
04:30 PM - 05:00 PM EDT (30 mins)

Organizer: Susan Harris

EXPAND DETAILS

INTERVIEW

Interview for Project Manager - Ben Hayat

Thursday, April 15th
03:00 PM - 03:30 PM EDT (30 mins)

Organizer: Susan Harris

EXPAND DETAILS

The Interviews page shows all of the interviews (for the logged-in user) in which they are an organizer, attendee, or both. Filters are available to narrow down the list of interviews. Filters include Organizer, Attendee, From Date, To Date, and Initiator.

Tip: An initiator is someone who created the interview but assigned someone else as an organizer.

When you first access this page, both the Organizer and Attendee fields default to you (as the logged-in user). The interviews shown are the ones you are part of. The date filters are pre-populated starting with the current date to one week out.

From this page, you can also view interview details, reschedule interviews, and complete interview questions.

View a list of interviews

- You can only view a list of interviews for which you are an organizer or attendee or both.

1. From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 243) opens.

2. Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

View more information about an interview

- You can only view more information about interviews for which you are an organizer or attendee or both.
 - More information includes candidate name (active link to candidate profile), candidate address, candidate phone number, candidate email address, and job interviewing for (active link to job).
1. From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 243) opens.

2. Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

3. For the interview you want, click **Expand Details**.
4. Click **More Info**.

Reschedule an interview

- You must be the organizer of an interview to reschedule it.
- The Reschedule button is not available if you are not the organizer of the interview.

1. From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 243) opens.

2. Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

3. For the interview you want to reschedule, click **Expand Details**.
4. Click **Reschedule**.
5. Select a new date and time.

Cancel an interview

- You must be the organizer of an interview to cancel it.
- The Cancel button is not available if you are not the organizer of the interview.

1. From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 243) opens.

2. Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

3. For the interview you want to cancel, click **Expand Details**.
4. Click **Cancel**.

Complete interview questions during an interview

- While interviewing a candidate, you can ask interview questions and document the answers.

- The questions and answers can be viewed here and on the candidate profile in the Evaluations tab.

1. From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 243) opens.

2. Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

3. For the interview you want, click **Expand Details**.

4. Click **More Info**.

5. Click **Interview Questions**.

6. Ask the questions during the interview.

7. Click **Submit Answers**.

Texting

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Texting

Texting is a feature that lets you send and receive text messages with candidates. It is a great way to communicate with candidates throughout the entire candidate experience.

Texting is a purchased feature. Contact your Rival Client Executive for details and pricing.

Benefits

- Communicate with candidates throughout the application, interview, and offer process
- Optimize hiring manager time and productivity
- Improve visibility into the candidate experience across the hiring team
- Reduce costs (texting is fast, cheap and has over a 90% open rate)

Limitations

- Documents and images cannot be included in texts at this time. (Emojis are supported.)
- The character limit for a single SMS text message is 160 characters. However, most modern phones and networks support concatenation; they segment and rebuild messages up to 1600 characters.

Future releases will address some of these current limitations. (Opting-in as part of the application process will only be available via Candidate Experience career sites and will not be extended to legacy career sites.)

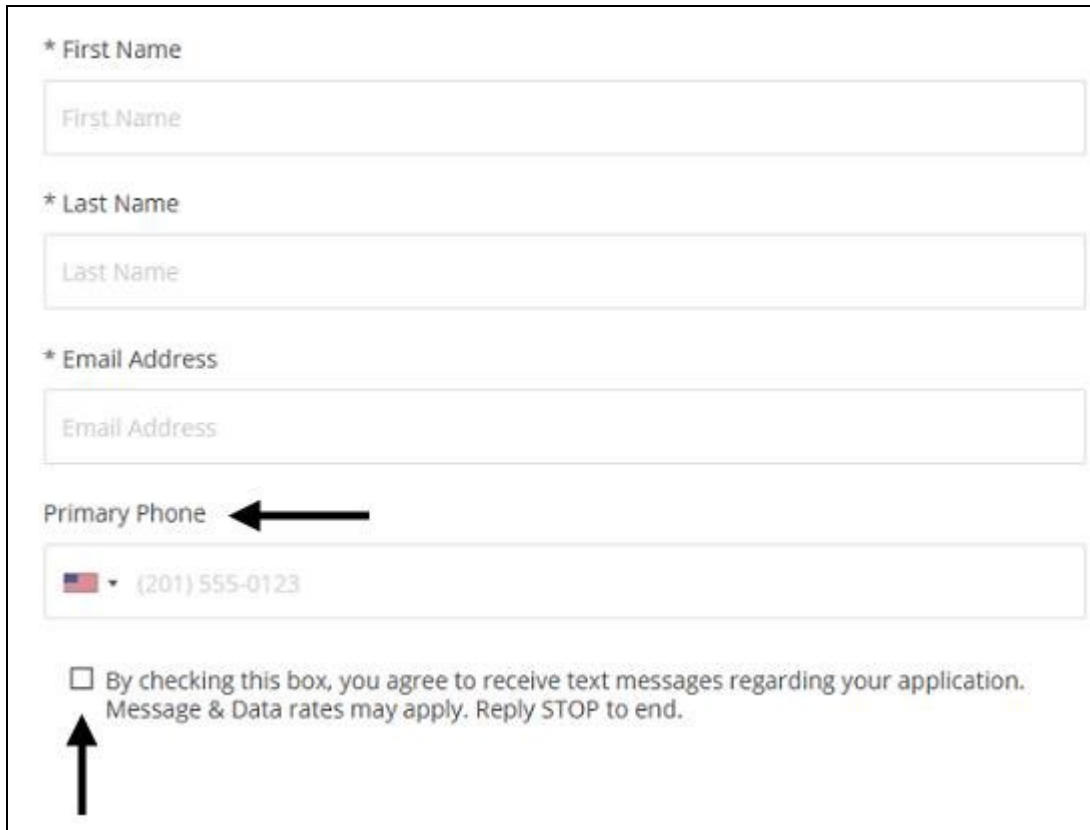
Setting up texting

Setting up texting is easy. Client administrators perform some setup tasks in Candidate Experience and Rival Recruit.

Texting setup in Candidate Experience

After Rival enables texting for your site, there is no required setup in Candidate Experience as long as your configurable application form includes the Primary Phone field. (This is because the system automatically adds the opt-in check box.)

If you are switching to the Candidate Experience career site after texting is enabled, verify that the Primary Phone field is part of your configured application form. If it is there, no action is required. If it is not, add it to your configured application form.



* First Name

First Name

* Last Name

Last Name

* Email Address

Email Address

Primary Phone ←

☐ By checking this box, you agree to receive text messages regarding your application. Message & Data rates may apply. Reply STOP to end.

↑

If you want to present additional informational text/instructions about the SMS functionality to applicants, you can add a Rich-Text field to your configurable application form above or below the Primary Phone field to relay that information.

Texting setup in Rival Recruit

As you know, roles do most of the heavy lifting in Rival Recruit, but user permissions can be granted to individual users to expand their capabilities. For texting, there are two new user permissions:

- View conversations with candidates
- Participate in conversations with candidates

Assign user permission to view text conversations

- This topic tells you how to assign the view text only permission. That permission gives users the ability to view texts but not send them.

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select **View conversations with candidates** from the list of permissions and click **Continue**.

Assign user permission to view and send text messages to candidates

- This topic tells you how to assign the view and send texts permission. That permission also enables the inbox icon (in the header next to user avatar).

1. From the navigation bar, click **Administration>User Accounts**.

The User Accounts page opens.

2. (If applicable) Filter to limit search results.
3. In the results list, click (check) a user.

Tip: To assign permissions to multiple users, click the check box beside each user. To assign to all users listed, click the check box in the heading column.

4. From the Take action list, click **Add Permissions** and click .

The Add Permissions page opens.

5. Select **Participate in conversations with candidates** from the list of permissions and click **Continue**.

Opting in

A candidate must opt in to receive/send texts. There are two ways to opt-in:

- Candidate opts in as part of the application process
- A privileged user opts them in

Existing candidates who applied for jobs prior to texting implementation are not automatically opted in.

Opting-in as part of the application process is only available via Candidate Experience career sites.

Opt in an existing candidate to texting

1. Search for and select the candidate.
2. On their candidate profile from the **Select an action** drop-down list, click **Correspond with candidate**.

The Email Candidates page opens.

3. In the Subject field, type the subject of the email. Example: SMS Text Opt-in Request.
4. In the Email Body field, do the following:
 - a. Type text describing what the candidate should do and press **Enter**. Example: Click the link below to opt-in to SMS Texting.
 - b. Click **Merge Fields**.

- c. From the Merge Fields drop-down list, select the Candidate Experience portal you want to send the candidate to.
- d. Click **Send Email**.

The system sends the candidate an opt-in email. The candidate follows the instructions in the email to opt in.

Opt in multiple existing candidates to texting (bulk opt in)

1. From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

2. Click **Edit Search** to display filters.
3. Select filters to find the appropriate subset of candidates to send opt-in request emails to.

Tip: The *Last Opt-in Request Older Than*, *Opted-in*, and *Entered in the last* filters are especially useful.

4. Click **Apply Filters**.

Search results appear in the data grid.

5. Select the check box next to the candidates you want.
6. From the Take Action list, click **Send Email** and click .

The Email Candidates page opens.

7. In the Subject field, type the subject of the email. Example: SMS Text Opt-in Request.
8. In the Email Body field, do the following:
 - a. Type text describing what the candidate should do and press **Enter**. Example: Click the link below to opt-in to SMS Texting.
 - b. Click **Merge Fields**.
 - c. From the Merge Fields drop-down list, select the Candidate Experience portal you want to send the candidate to.
 - d. Click **Send Email**.

The system sends the candidate an opt-in email. The candidate follows the instructions in the email to opt in.

Inbox

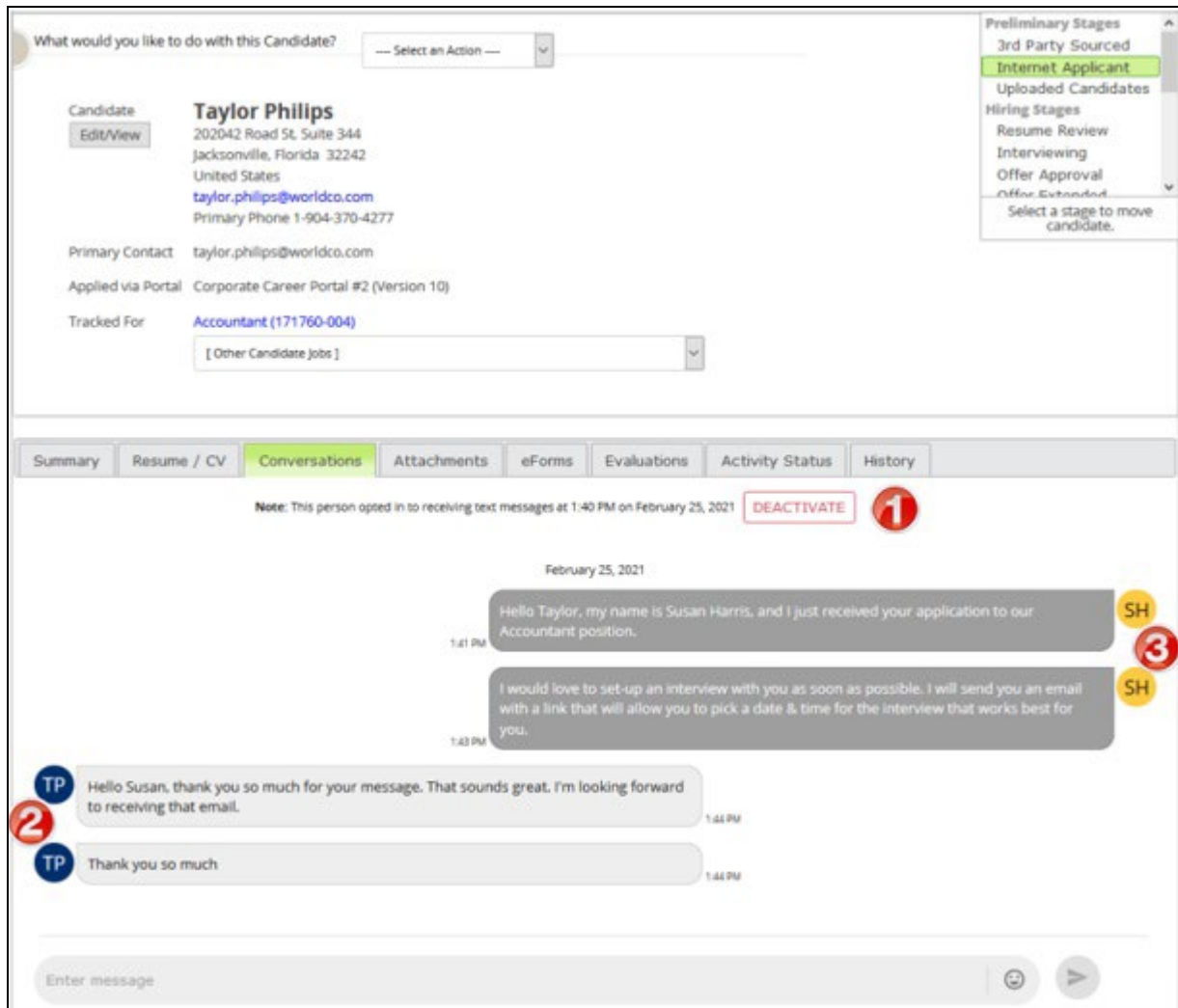
Conversations		
	Taylor Phillips	2 minutes ago
	Angela Duckett	2 hours ago
	Gregory Gibbons	4 hours ago

Your inbox is where you go to read text messages sent to you. Text messages are grouped by candidate.

Key info

- Names in bold mean there are unread text messages
- Names in normal text (not bold) mean there are no unread text messages
- The candidates for whom all text messages have been read appear in your inbox for 24 hours after the last message is read, then is removed from the inbox. However, all text messages for every candidate are always visible under the Conversations tab on the candidate profile.

Conversations tab



What would you like to do with this Candidate? --- Select an Action ---

Candidate
Taylor Philips
 202042 Road St, Suite 344
 Jacksonville, Florida 32242
 United States
 taylor.philips@worldco.com
 Primary Phone 1-904-370-4277

Primary Contact taylor.philips@worldco.com
Applied via Portal Corporate Career Portal #2 (Version 10)
Tracked For Accountant (171760-004)
 [Other Candidate Jobs]

Preliminary Stages
 3rd Party Sourced
Internet Applicant
 Uploaded Candidates
Hiring Stages
 Resume Review
 Interviewing
 Offer Approval
 Offer Extended
 Select a stage to move candidate.

Summary **Resume / CV** **Conversations** **Attachments** **eForms** **Evaluations** **Activity Status** **History**

Note: This person opted in to receiving text messages at 1:40 PM on February 25, 2021 **DEACTIVATE** **1**

February 25, 2021

1:41 PM SH **3**
 Hello Taylor, my name is Susan Harris, and I just received your application to our Accountant position.

1:43 PM SH
 I would love to set-up an interview with you as soon as possible. I will send you an email with a link that will allow you to pick a date & time for the interview that works best for you.

1:44 PM TP **2**
 Hello Susan, thank you so much for your message. That sounds great. I'm looking forward to receiving that email.

1:44 PM TP
 Thank you so much

Enter message 😊 ➤

The Conversations tab on the candidate profile is where you read and send text to candidates. Here are some key features.

	Feature	Description
1	Deactivate button	Use when you no longer want to have a text conversation with the candidate. Deactivating stops the candidate from being able to participate in the text conversation any longer. Once deactivated, text displays underneath the most recent text message that indicates the date and time the conversation deactivated. Tip: After deactivation if you want to restart the conversation with the candidate again, simply send a new text message.
2	Incoming texts	The left side of the page displays text messages from the candidate and other Rival Recruit users. The avatar is the initials of the person who sent the message.

	Feature	Description
		Tip: Hover your mouse over the avatar to see the person's full name.
3	Outgoing texts	The right side of the page displays the text messages that you sent. The avatar is your initials.
Not shown in graphic	System messages	Any messages sent by the system appear on the right side of the page. The avatar is SP, which means System Participant.
Not shown in graphic	Candidate has not opted in	If a candidate has not opted in to receiving text messages, a message appears at the top of the chat box letting you know this. You cannot send texts (text bubble and send icon are disabled).
Not shown in graphic	Candidate has opted out	If a candidate opts out of receiving text messages, a message appears below the last text message. It includes date and time when the candidate opted out. You cannot send texts (text bubble and send icon are disabled).

View text messages in your inbox

-  means you have unread messages. The bubble shows the number of unread messages.
- The inbox shows the name of the candidates who texted.
- Names in bold means there are unread messages. Name in normal font means all messages have been read.
- Candidates for whom all messages have been read stay in your inbox for 24 hours after reading the last message, then they are removed from the inbox.

1. From the header, click .

The **Conversations inbox** (page 250) opens.

2. Click a candidate name to navigate to the **Conversations tab** (page 251) on the candidate profile to read and send text messages.

Send a text message to a candidate

- You can only send a text to a candidate who has opted in to receive text messages.

1. From the header, toggle the search box to **Candidates**.
2. Enter a candidate's name and press **Enter**.

The Candidate Pool page opens.

3. In the data grid, click the candidate's name.

The Candidate profile opens.

4. Click the Conversations tab.

5. Enter text into the text bubble at the bottom and click  or press **Enter**.

Send a text message to multiple candidates (bulk texting)

- You can only text candidates who have opted in to text messaging.

- From the navigation bar, click **Candidates>Candidate Pool**.

The Candidate Pool page opens.

- Filter to limit search results to candidates who have opted in to text messaging:

- Click **Edit Search** to expand the filter panel.
- From the Opted-in filter, select **Yes**.
- Click **Apply Filters**.

- Select the check box next to the candidates you want to text.

- Click  and select **Send Text Message**.

Note: If you did not filter (step 2) and at least one candidate has not opted in, an error message appears and you must re-select the candidates to exclude the candidates who did not opt in.

- On the chat box, enter the text message. You can include text, merge fields, and emojis.

- To include merge fields, type @ followed by the starting letter of the merge field. Don't remember all the merge fields? Click **Merge Fields** to view a list.

Tip: Many of the merge fields are associated with a job. If you are sending text to candidates not associated with a job (for example, open submission candidates), avoid selecting job-related merge fields.

- To include an emoji, click .

- Click **Continue**.

The text message is sent.

Reply to a candidate's text message

- From the header, click .

The **Conversations inbox** (page 250) opens and displays candidates who sent text messages in the last 24 hours.

- Click a candidate's name.

The candidate's candidate profile opens.

- Click the Conversations tab.

- Enter text in the text bubble and click  or press **Enter**.

Print an entire text conversation

- From the header, toggle the search box to **Candidates**.

- Enter a candidate's name and press **Enter**.

The Candidate Pool page opens.

3. In the data grid, click the candidate's name.

The Candidate profile opens.

4. Click the Conversations tab.

5. Click **Print Conversation**.

Deactivate (stop) a text conversation

- You can deactivate a text conversation with a candidate if you no longer want to interact with them via text.
- Once deactivated, if the candidate attempts to send a message, the system sends a message that the text conversation is deactivated.
- The Deactivate button is only displayed if:
 - At least one text message has been sent or received
 - The conversation has not been deactivated already
 - The candidate has not opted out of receiving further text messages
- A candidate can deactivate a text conversation by texting STOP on their mobile device.

1. From the header, toggle the search box to **Candidates**.

2. Enter a candidate's name and press **Enter**.

The Candidate Pool page opens.

3. In the data grid, click the candidate's name.

The Candidate profile opens.

4. Click the Conversations tab.

5. Click **Deactivate**.

Reactivate (restart) a text conversation

- You can reactivate (restart) texting with a candidate after deactivation.
- You can only reactivate a conversation if the candidate did not opt-out before the conversation was deactivated.

1. From the header, toggle the search box to **Candidates**.

2. Enter a candidate's name and press **Enter**.

The Candidate Pool page opens.

3. In the data grid, click the candidate's name.

The Candidate profile opens.

4. Click the Conversations tab.

5. Enter text in the text bubble and click  or press **Enter**.

Dashboards (Legacy)

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Candidate dashboard

Use the dashboard to view available hiring workflow(s) and associated hiring stages from a single location. You can filter the view by hiring workflow and/or job status (Open/Closed/All).

Key info

- Here's a summary of each chart/graph:

Chart or graph	Description
All Hiring Workflows	Shows a visual representation of the candidates in each hiring stage. Use the: ▶ Hiring Workflow drop-down to select a hiring workflow to view. To view all workflows, associated hiring stages and candidates, select All. ▶ Job Status drop-down to view open, closed, or all jobs. Note: Hiring workflows are created during the implementation process. Requests to update or add additional workflows can be made through Rival Support by your administrator.
Shared Hiring Stages	Shows a visual representation of shared hiring stages. To view candidates in a shared hiring stage, click on a stage name.

- Each graph is interactive and provides access to additional details. You can:
 - Hover over a bar graph to see details
 - Click a bar graph to go to a details page
- You can also click a stage to go to a details page.

Good to know

- Use the *View as Recruiter* drop-down to view by a specific recruiter or recruiting manager or use the All option to view information for all recruiters/recruiting managers. By default, a recruiting manager's dashboard view shows information specific to their jobs.

Jobs dashboard

This dashboard provides easy access to job information that recruiters and recruiting managers use the most.

Key info

- Here's a summary of each chart/graph:

Chart or graph	Description
Jobs	Provides access to job posting details. Click a group in the graph to track jobs. Jobs are listed based on their status (Hold, Internal, Normal). Use the Track My Jobs link to view a list of your jobs.
Job Board Effectiveness	Displays the number of postings, responses, and hires for the top job boards used by the customer. Mouse over a group in the graph to view response, posting, or hire information. The job boards listed are based on the boards configured for your company. Available job boards are listed under Resources on the Navigation bar. Choose Advanced Search link to use additional search filters to locate postings. Note: Postings through Broadbean or JobTarget are not shown on the Job Board Effectiveness chart. Job board posting metrics are available from the Broadbean or JobTarget stand-alone tool, which can be accessed by the Manage Broadbean or JobTarget Postings on the Manage Jobs page.
Career Site Postings	Shows job postings by career site. Click a title to view details.
Job Board Postings	Shows job postings by job board. Click a title to view details.

- Each graph is interactive and provides access to additional details. You can:
 - Hover over a pie piece or bar graph to see details
 - Click a pie piece or bar graph to go to that particular page
 - Click a color in the legend to hide a pie piece and make other pieces larger
 - Click a color in the legend to hide a bar graph

Tip: Click that same color in the legend again and that pie piece or bar graph reappears in the chart.

Good to know

- Recruiting managers can use the *View as Recruiter* drop down to view by a specific recruiter or recruiting manager or use the All option to view information for all recruiters/recruiting managers. By default, a recruiting manager's dashboard view shows information specific to their jobs.

Recruiter dashboard

This dashboard provides easy access to information that recruiters and recruiter managers use the most. It is the default landing page that appears when recruiters and recruiting managers log in. It is also accessible via the home icon .

Key info

- Here's a summary of each chart/graph:

Chart or graph	Description
Hiring Stages	Provides a summary of candidates in various hiring stages. Click any stage to view a list of candidates in the current hiring stage. Click on the Candidate Dashboard link to view the Candidate Dashboard.
Top 5 Sources	Provides the top five sources (for your company) for candidates associated to active jobs. Click a listed source to view a candidate list for the selected source and access resume. Use the Advanced Search link to use additional search features.
Requisitions	Shows a visual representation of pending, approved or rejected requisitions. Click a group to view a list of pending, approved, or rejected requisitions. Click on Track My Jobs link to view a list of your jobs or use the Requisitions link to view a list of requisitions.
Candidate Aging	Provides candidate aging information. Graph represents the count of applicants entered in the system in the last 30 days. Click a group in the graph to view candidate details. As the candidate's enter date ages, they fall off the applicable bar results. Use the Advanced Search link for additional search filters.
Interviews	Provides access to a list of complete or pending interviews. Click the Interviews Status link to view all interviews.
Reviews	Displays the number of completed and requested reviews. Click a group in the graph to view completed or requested reviews listed by hiring manager. Choose the Reviews Status link to view all reviews.

- Each graph is interactive and provides access to additional details. You can:
 - Hover over a pie piece or bar graph to see details
 - Click a pie piece or bar graph to go to that particular page
 - Click a color in the legend to hide a pie piece and make other pieces larger
 - Click a color in the legend to hide a bar graph

Tip: Click that same color in the legend again and that pie piece or bar graph reappears in the chart.

Good to know

- By default, a recruiting manager's dashboard shows information specific to their jobs and candidates. However, recruiting managers can use the *View as Recruiter* drop-down to view by a specific recruiter or recruiting manager or use the All option to view information for all recruiters/recruiting managers.

Reports (Legacy)

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Standard reporting (Legacy)

Rival Recruit offers a variety of standard reports that can be filtered and exported in HTML, MS Excel, CSV or XML. The available Rival Recruit standard reports are listed below.

Note: Permissions control what reports you can view. You might not have access to all the standard reports.

Equal opportunity and OFCCP compliance reporting

Report	Description
2007 and up candidate OFCCP/affirmative action EEO data extraction	Provides an extraction of raw candidate EEO data. The report outputs a single row for each candidate currently associated with a job that was closed within the specified date range. The close date is based on the last date any candidate was moved into the hired stage for the specified job.
2007 and up candidate OFCCP/affirmative action statistics EEO report	Provides a formatted statistical analysis of candidate Affirmative Action data. The report counts all candidates currently associated with a job that was closed within the date range of the report. The report does not include any candidate not associated with a job.
2007 and up - hired candidate EEO-1 data extraction	Provides an extraction of the candidate EEO data associated with <i>hired</i> candidates only. The report outputs a single row for each candidate hired during the specified date range.
2007 and up - hired candidate EEO-1 statistics report	Provides a formatted version of the US Federal Government EEO-1 report. The report provides counts for candidates hired through Rival Recruit during the specified date range. The candidate must be currently in the hired stage.
2007 and up - new hire vets-100 EEO report	Provides a statistical analysis of candidate Veteran information. The Vets-100 report is provided by OFCCP-compliant employers for new hires and existing employees. Our version accommodates only new hire data. The report provides counts for candidates hired during the specified date range. To be included in the report, the candidate must be in the hired stage at the time the report is run.

Report	Description
2007 EEO data report	Shows EEO data for candidates who entered Rival Recruit from 01-Jan-2007 onward and does not include pre-2007 data. The report uses data stored in a data mart to ensure that large sets of data can be extracted in real-time.

Job Cycle Time

Report	Description
Job Cycle Time Report	Shows a count of total jobs, filled jobs, number of hires, and average days to hire for each recruiter, filtered by the assigning recruiting manager.

OFCCP reports

These reports are OFCCP specific and include candidate pre-offer and post-offer selection values.

Due to sensitive information, these reports can be restricted to specific users. Those specific users can find OFCCP reports under the Administration menu option on the AAP Job Groups menu. It is a good idea to notify Rival Support the users who have access to OFCCP reports.

Report	Description
New Hire Vets-100a OFCCP report	Provides a statistical analysis of hired veteran information reflecting the OFCCP's post-offer veteran identification values.
New Hire Vets-4212 OFCCP report	Provides an aggregate total of candidate veteran information reflecting the OFCCP's post-offer veteran identification values.
OFCCP Contractors Hiree Export	Hiree Export with pre-offer and post-offer veteran and disability values.
OFCCP Hiree Export Alternate Version report	Hiree Export Alternate version report with pre-offer and post-offer veteran and disability values.

Report	Description
OFCCP/EEO report	Report is built off the 2007 and up Candidate OFCCP/AA EEO data extraction report. (Contains same fields.) Additional fields include: - Previous Stage - Start Date - Filter: business unit (optional) - Vet Status pre- offer - Vet Status post-offer - Disability pre-offer - Disability post-offer Method of identification for gender, race/ethnicity, vet status, and disability values (self-identify or visual identify)
OFCCP AAP Job Group Totals	Reporting specifically by AAP job group totals: - Total number of job openings - Number of Rival Recruit positions opened during specified date range - Total number of jobs filled - Number of Rival Recruit jobs opened during specified date range where a candidate is in the hired hiring stage, and the job is closed - Total number of applicants - Total number of applicants hired - Number of candidates in the hired hiring stage - Total protected veteran applicants pre-offer - Total protected veteran applicants post-offer - Total hires who are protected veterans (post-offer) - Candidates residing in the hired hiring stage denoted as a protected veteran via post-offer identification - Total applicants who are Individuals with Disabilities pre-Offer - Total applicants who are Individuals with Disabilities post-Offer - Total hires who are Individuals with Disabilities (post-Offer) - Candidates residing in the hired hiring stage denoted as an individual with disability via post-offer identification

Requisition and job reporting

Report	Description
Approved requisitions by date	Displays all approved requisitions that have been posted as jobs with approvers. The report can be filtered by approved date, company location, requisition creator, department, and filled/unfilled.
Active job listings with description	Provides a listing of active jobs with the description, department, location, and assigned hiring manager.
Active job log	Lists all currently active jobs. The report can be filtered by company location, department, recruiter, job status, position, hiring status, and hiring manager.
Filled job log	Lists all jobs with a candidate in the hired stage, regardless of date. The date posted field is the date the job record was created in Rival Recruit.
Evergreen Job Postings	Provides information about a selected evergreen job posting and all the evergreen job postings that were cloned from that original evergreen job.
Job postings log-filled	Displays all jobs with a candidate who entered the hired stage during the specific date range. The report can be filtered by company location, department, and hiring manager.
Job Template report	Provides a listing of all active and inactive job templates.

Applicant reporting

Report	Description
Applicant Count by Job	Provides a count of resumes received during a specified date range. The report can be filtered by date, company location, department, recruiter, and hiring manager.
Applicant Count by Source	Provides a count of resumes received during a specified date range. The report can be filtered by date, company location, department, recruiter, and hiring manager.
Applicant Log with Contact Information	Provides a listing of candidates with the candidate enter date filtered over a specified date range. The report includes contact, job, source, and skill set information. This report can be used as a source file for mail merges.

Budgeting and fee reporting

Report	Description
Budget Report	Provides a quarterly and annual comparison of job budgets vs. hired salaries. The report can be filtered by company location, department, hiring manager, recruiter, and quarter/year.
Fee Agency-Vendor Information	Displays fee agency information along with the number of candidates submitted and hired for each.
Time-To-Fill	Displays time-to-fill and time-to-start metrics for all jobs where a candidate entered the hired stage during a specified date range. Note that the: ▶ Time-To-Start field calculates from the Original Posting Date (the day the job was first posted internally or externally) through the Start Date entered on the candidate's Hired stage page. ▶ Time-To-Hire field calculates from the Original Posting Date through the day the candidate is physically moved into the Hired Stage. This report includes active and inactive jobs. The report can be filtered by hired date, department, company location, recruiter, hiring manager, business unit, and evergreen job posting. For performance purposes, the report uses the date stored in a data mart to ensure large sets of data can be extracted in real-time.
Unposted Requisitions by Date	Provides up-to-the-minute information about requisitions that are currently in the approval process. The report can be filtered by create date, requisition creator, and department.

Report	Description
Stage Duration	Provides information about the average time candidates reside in each hiring stage. The report can be filtered by workflow, group by (job, hiring manager, recruiter, recruiting manager, and department), job posted start date, job posted stop date, job, hiring manager, recruiter, recruiting manager, and department. Report is divided into two tables: Stage Duration (top table): ▶ Shows average number of days candidates resided in each stage during the date range you selected and based on filters you selected. ▶ Job Posted Start Date field is required. If you do not select a date for the Job Posted End Date field, 12 months from the start date is used. Twelve months is also the maximum date range for report results. ▶ Results are sorted by sequence of the hiring stages. Stage Duration Grouped By (bottom table): ▶ Results are grouped by the selection in the Group By field and sorted by sequence of the stages, followed by decreasing average number of days in the stage.

Candidate reporting

Report	Description
Offer Approval Report	Displays detailed information for job offers made during a specified date range.
Detailed Hired Candidates Information	Provides information about hired applicants. The date range is based on the date the applicant was moved into the Hired stage in Rival Recruit. (Formerly: EEO-Hired Candidate EEO)
Hiree Export	Consists of a log of detailed hired candidate related data including account custom fields. Used to extract hiree information in batch in response to a client-initiated requests. The report displays a single row for each candidate moved into the Hired stage during a specified date range. This is a complex report containing 50+ columns of data and is intended for extraction of data over short time frames. Tip: Execution of this report should be limited to date ranges encompassing less than two weeks of data.

Report	Description
Hiree Export - Alternate version	This is an alternate version of the "Hiree Export" report designed for execution over longer date ranges. This alternate version can support up to 12 months of data and is run off an alternate (data mart) data source that is populated on a nightly basis. For this reason, the report output will not contain the current day's hired candidate information.

Rival Recruit user reporting

Report	Description
Rival Recruit User Accounts	Displays all Rival Recruit user accounts. The report can be filtered by user status and user role over a specified date range.
Users Location Report	Provides an extract report of user/location associations.

Interactive reporting

You can sort and manipulate interactive reports directly in Rival Recruit. Links let you navigate to other areas of the product directly from a report. Most are viewable within the user interface only and are not exportable.

Report	Description
EEO Reports	Provides links to various EEO reports. EEO reports are only available to recruiting managers.
Posted Jobs	Allows recruiters and recruiting manager to view the status of third-party job board postings that have been made in Rival Recruit within a date range broken out by recruiter and job posting. The report provides details, including the date the posting was requested, the date the job was posted and when the posting was deactivated (if applicable). A recruiter sees only their postings. A recruiting manager can use the drop-down list to view by selected managers or all.
Approved Requisitions	Provides a summary of requisitions created and approved for posting within a specified date range. Additional filters can be applied to specify requisitions by location, requisition creator, department, and status (filled or unfilled).
Un-posted Requisitions	Provides a summary of requisitions created and approved within a specified date range and are ready for posting (but have not yet been posted). Additional filters can be applied to specify requisitions by location, requisition creator, and department.

Custom reporting

Depending on your company's needs, you may need custom reports. Rival staff can create custom reports for you. Custom reports are a chargeable service, and cost varies based on the report's complexity.

Custom report

You can request a custom report that has a defined set of columns (fields) in the order you want based on parameters you request. Rival configures the report for you.

You access custom reports on the My Reports page. They are listed in alphabetical order. Custom reports can be made available to any user role. It is also possible to configure the report to be run securely from outside Rival Recruit over the web via a secure URL.

Any custom report run from within Rival Recruit can be exported to HTML, MS Excel, CSV, or XML formats. When a report is exported, it can be saved to a user's PC and manipulated as desired.

Requesting a custom report

After you determine a need for a custom report, the next step is to develop a mock-up of the report in Microsoft Excel XLS format. Rival uses that mock-up to develop a report specification to serve as the model for the report.

The mock-up should include:

- The column headings to be included on the report, in the display order you want.
- For each column heading, include a note that defines where the screen field appears in Rival Recruit.
- At least three rows of sample data. The sample data should reflect the desired output of the report.
- The name of the report and any additional notes should appear at the top of the report.
- Indicate the default sort order (which column) at the top for the report.
- Any global report parameters should be referenced as notes at the bottom of the mock report. A global report parameter is any parameter that defines the overall operation of the report, every time it is run, regardless of user input. For example, an "Open Job" report should never show closed jobs. Therefore, the fact that the job is open would be considered a global report parameter.
- It is important to indicate any report filters at the bottom of the mock report. For each report the customer may select up to five report filters. A report filter limits the data that is displayed on the report in some way. Any field may be used as a filter as long as it is a drop-down field or date and it is associated with the data being pulled into the report in some way.

After you create a mock report, send it to Rival Support with an explanation of your request. An implementation consultant will be assigned to review the mock-up and draw up a specification based on the mock-up. The actual specification is an expansion of the mock report, using customer provided information, in a Rival Recruit "developer-friendly" format.

The implementation consultant will contact you with any questions during the review process to ensure the specification is correct. Once you and the implementation consultant agree that specification is correct, an estimate will be provided and a work order drawn up. Once the work order and contract for the work are signed, the report will be queued for development. Development of a custom report can take between one to six weeks depending on complexity and current work queue.

Some tips:

- Use an existing report as the basis for a new report. If you find that an existing report works for you, except that you need additional columns, the services charges will be lower for modifying an existing report than writing a new one from scratch.
- Reports can only contain one type of data per column. The data contained in a single column can only be pulled from one field. A maximum of 25 columns is allowed on any single report.

My Reports page (Legacy)

My Reports page shows all the standard, pre-written reports that you can access and run. Each report is listed along with a description. They are listed in alphabetical order. They are updated by the minute.

If you are a hiring manager, you only see the reports an administrator or recruiting manager assigned to you.

Clicking the Report Name launches a new window where you can use filters to get a report just the way you want it. The format filter determines the file format of the report output.

Tip: If you want to manipulate report data after it is generated, select MS Excel format. Other report options are HTML, CSV, or XML.

If you click a report name and a new window does not launch, you may have a pop-up blocker installed, which prevents the new window from opening. To resolve, add the *.silkroad.com domain as a permitted site in your pop-up blocker's configuration.

Run a My Report

1. From the navigation bar, click **Reports>My Reports**.
2. Click a report link.
3. Enter information to run the report. Certain reports may require that a user enter a date range or other report parameters.
4. Using the drop-down list select the report format. If you want to view the report on screen, choose HTML.

Note: Any report on the My Reports screen can be exported as MS Excel, HTML, CSV or XML file format.

5. Click **Run Report**.

Reporting roles and report access

Reporting roles

Role	Description
Administrator	Reports section appears in the left navigation. Once a report has been assigned to the administrator role, the My Reports link is available under the Reports section. Administrator roles are not limited by locations and will see all information when reports have been assigned to that role.
Exec./Report Viewer	Report Viewer role will only see the My Reports left navigation link if one or more reports have been assigned to that role via the Manage Report Access. Permissions and Features does <i>not</i> control the My Reports link for Exec./Report Viewers.
Hiring Manager	Hiring Manager role will only see the My Reports left navigation link if one or more reports have been assigned to the role via the Manage Report Access. Permissions and Features does <i>not</i> control the My Reports view for Hiring Managers. Additional Note, Hiring Managers are not limited by locations therefore they can see everything for the reports that are assigned to that role.
Recruiter	Recruiter role will only see the My Reports left navigation link if one or more reports have been assigned to that role via the Manage Report Access. Permissions and Features does <i>not</i> control the My Reports view for the Recruiter Role. Recruiter users can also have limited access to data based upon the locations that have been assigned at the user level.
Recruiting Manager	The My Reports link is on by default for all Recruiting Manager users. Recruiting Manager users can have limited access to data based upon the locations that have been assigned at the user level.

Manage report access for a role

- As an administrator or recruiting manager, you assign the reports that a **role** (see "**Reporting roles**" on page 267) can access.
 - The reports you assigned appear on a role's My Reports page.
- From the navigation bar, click **Administration>Manage Report Access**.
The Manage Report Access page opens.
 - From the Manager Report Access by list, click **Role**.
 - Select a role.
 - Click (check) the reports the role can access.
 - Click **Save**.

Report Builder (Legacy)

Report Builder is a powerful tool that recruiting managers use to create ad-hoc reports on-the-fly. A report generated from Report Builder contains specific information that a recruiting manager selected to be included. Recruiters and hiring managers cannot view Report Builder reports.

Create a report using Report Builder

1. From the navigation bar, click **Reports>Report Builder**.
2. Click **Create Report**.
3. In the Data Marts list, select a data mart:

Data mart	Description
Applicant Tracking Log	Use when your intended output is a single candidate record per row. You can extract detailed information about candidates and limited information about the jobs they are associated with.
Job/Posting Metrics	Use when your intended output is a single job record per row. You can extract detailed information about jobs and limited information about the candidates.

4. Select output criteria:

Criteria	Description
Export Report	Select the export file format: HTML, XML, CSV, MS Excel Tip: Select HTML to view results on-screen. MS Excel to manipulate later.
Sort/Order By	Select the column to sort by.
Sort Order	Select ASC or DESC
Update Report Definition	Select Yes or No. Tip: Yes saves the report for future use. Enter a report name and description.

5. Select data fields and filters:

- Click each tab to find the fields within your database.
- Place a check mark in each box to the right of the fields you want in your report.

Tip: You can choose to use the selected field as a filter. This adds a column to the results. Use the Filter drop-down to narrow the data results. Use a filter to limit your output to specific records. There is no limit to the number of fields you can select. However, the more fields you select, the longer it takes to run the report. An excessive number of selected fields can cause timeouts. Select only the columns you need.

6. Click **Finish and View Report** to run the report.

Tip: Any custom report can be exported to HTML, MS Excel, CSV, or XML formats. You can then save to your PC and manipulate as desired.

Run a saved Report Builder report

- If you previously saved a report, you can run it from the Report Builder menu.
 - You change or reset the filters associated with the saved report.
1. From the navigation bar, click **Reports>Report Builder**.
 2. From the Execute Saved Report list, select a report.

Tip: To change the fields or filters of the saved report, place a check mark in the check box provided.

3. Click **Execute Report**.

Delete a saved Report Builder report

1. From the navigation bar, click **Reports>Report Builder**.
2. From the Executed Saved Report list, select a report.
3. Click **Delete Report**.

Recruiting teams

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Recruiting teams overview and benefits

Recruiting teams is disabled by default. If enabled, you have these features in Rival Recruit:

- My Groups tab is added in My Account area (along top blue bar at right) for administrators, recruiting managers, and recruiters to create their own personal and/or shared (depending on role permissions) group of team members.
- When creating a new job or editing an existing job, the Recruiting Team field is available for selection of team members and/or the group you created.
- The assigned recruiting manager and recruiter are the only users with permission to close a job. If a recruiting manager and/or recruiter are assigned to the recruiting team, they can close the job because they have been added to the recruiting team and their role has the assigned permission to complete these tasks. Only the assigned recruiting manager, recruiter and hiring manager are the "owners" of the jobs they are assigned to.

Benefits

- Recruiting teams save time instead of adding names one at a time (up to 30 names) you can select a group from the list that you created so they have visibility to the assigned job.
- Recruiting teams are most useful when you want multiple system users to have visibility to the job that has a recruiting team assigned.
- Use recruiting teams when you want recruiters/hiring managers to have visibility to a job and the candidates. Recruiting managers by default can see *all* jobs and candidates.

Add a recruiting team to existing job posting

1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. (If applicable) Filter to limit search results.
3. In the list, click a job's job title.

The Job Posting Details page opens.

4. Click  and click **Edit This Job**.

The Edit Job Posting-Position Details page opens.

5. Click  and click **Edit Job Posting-Department & Budget Details**.
6. From the Recruiting Team list, select a recruiting team.

Tip: Type %%% to view a list of teams.

7. Click **Save**.

Broadbean or JobTarget integration

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Sending a job to Broadbean or JobTarget

There are multiple ways to access the Broadbean or JobTarget integration when posting a job from within Rival Recruit.

Posting a new job to Broadbean or JobTarget (initial creation)

You can post a new job in Rival Recruit using these methods:

- Post an approved requisition from the Manage Requisitions page
- Create a job posting from the Jobs page
- Use the Post a Job quick link from the Job Details page.

Regardless of method, during the posting process on the Review Job Details page, you must select the Post to Job Boards button. Selecting that button takes you to Step-1 of the Broadbean or JobTarget posting process.

Posting an existing job to Broadbean or JobTarget

To post a job to third-party job boards via Broadbean or JobTarget, click the Broadbean or JobTarget tab when editing a job.

Broadbean Tab notes:

- If a job has been posted to Broadbean, clicking the Broadbean tab when editing the job will no longer route the user to the Step-1 of the posting process, but rather to the Job Board Status page.
- If a job has never been posted via Broadbean and the job has been deactivated (closed), or the status has been changed to On Hold, the Broadbean tab will no longer display. The tab will display again if the job status changes or the job posting is re-activated.
- If a job has been previously posted via Broadbean, and the job is deactivated or put On Hold, the Broadbean tab will display. When the user clicks on the tab, it will route the user to the Job Board Status page, to allow the user to view the last status of this job posting on the various job boards it had been posted to.

Broadbean posting process

Step-1 Choose job boards

Upon selecting the Broadbean tab, you will be directed to the Broadbean API within Rival Recruit. A list of all the available job boards the logged in Rival Recruit user has been given permission to post to is displayed.

The recruiting user should click the appropriate check boxes to denote where the job should be posted. The All Sites Below check-box can be selected with the top check box.

Job Board Postings

Close

AdCourier v4

Broadbean Technology

- Step 1: Choose Job Boards
- Step 2: Posting Details
- Step 3: Preview + Send

Please click the job board logos to create this posting

☐ All Sites Below

Broadbean Test Board


☒ (Free)

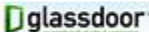
CareerBuilder (North America Only)


☐

Facebook


☒ (Free)

Glassdoor.com


☐

Jobs Cabinet (Test Board)


☒ (Free)

Twitter


☐

Adcourier Version 4.0. Powered by [Broadbean](#)

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Once all desired job boards have been selected, you will need to select the Continue button at the bottom-left of the screen. You will be directed to Step-2 of the Broadbean posting process, where information from the job posting in Rival Recruit will pre-populate select fields.

Step-2 Posting details

You will enter all of the relevant details regarding the job. While some of this information will pre-populate via the integration, it is important to note that the fields generated in Step-2 are directly related to the job boards that were selected in Step-1. Therefore, if a job board requests information that is board specific, it will be listed as an additional field in Step-2. These job board specific fields won't pre-populate. You will need to fill out the appropriate job board specific fields on the fly. Required fields will be denoted. You should review all the fields in Step-2 carefully.

Example: You selected the ChinaHR Job Board in Step-1. Job board specific posting fields of ChinaHR Job Shift and ChinaHR Experience are displayed.

Note: If ChinaHR would not have been selected in Step-1, you would not be presented with these options in Step-2.

Posting field details

Reference No. is the Rival Recruit Tracking Code for the position and is pre-populated for you via the integration.

Job Type will pre-populate for you wherever possible. Broadbean supports three job types: Employee (which maps as “Full Time” on job boards), Contract, and Temporary. Therefore, you will need to select one of the available Broadbean options, whenever this field did not map over.

Start Date is not a required field

Industry Sector will pre-populate whenever possible. Note that Rival Recruit’s Industry field on the posting and Broadbean’s Industry Sector field do not have exact mapping in all cases, which means that some Rival Recruit options may not align with the same verbiage used in Broadbean.

Example: For Rival Recruit’s Industry field, Computer Software and Computer Hardware are available options. Both of these would be mapped in Broadbean as IT.

Salary + Benefits this information will pre-populate based upon what is entered in Rival Recruit, but this is not a required field in Broadbean, so this information may be taken out if desired.

Location an exact mapping for the locations that Broadbean supports compared to the locations that Rival Recruit supports is not always possible, therefore this field will not pre-populate. To input the location of the job in Broadbean, you will simply type in the zip code, or the name of the location, i.e. New York, in the Location free-text field. Broadbean will then populate all possible matches in a drop-down, from which you can then choose the correct match. The options displayed in the drop-down are based upon the following treed structure: Continent > Country > State > County > City.

Once you have chosen the location, the location details will populate under the location field for review. If you are happy with the location, move on to the next required field, if not, override the location by typing a new zip code or location name in the Location free-text field.

Detailed Job Description will pre-populate the job description from the Rival Recruit posting. You can modify the job description in this area prior to it being sent to the job boards. Any updates made to the job description here will NOT be reflected on the job posting within Rival Recruit.

Note: The Required Skills and the Required Experience fields from Rival Recruit’s job posting details page will appear as bold headers in the Detailed Job Description field of Broadbean. Any text entered in those fields in Rival Recruit will appear below the general Job Description. However, if no content was added to the relevant text boxes in Rival Recruit during the job creation process, the headers will not display.

Character Counter tells you the number of plain text characters and HTML characters used and allowed in the job description as a courtesy warning ONLY. If you exceed the allowed character limit for a board, (which is passed to Broadbean by the job boards that the user selected in Step-1), the job may be rejected or failed by the job board when the job is sent to that board. Broadbean will always send all the characters listed in the job description field.

Note: If Broadbean receives a reason for a posting failure from a job board, they will forward that failure notification via email to the email address stored in Broadbean for that user who attempted to post the job.

After you are satisfied with content of the job description, select **Continue** to move on to the third and final step of the posting process.

Step-3 Preview and send

The third and final step of the posting process is where you will review all of the posting information before sending it to the selected job board destinations.

Prior to sending the job, review the job posting details to ensure all information is correct. You can toggle back and forth between steps 2 and 3 by using the Go Back button to make all necessary corrections. Once you are happy with the listed job details, click **Send Posting**. Broadbean sends the job posting to be advertised on each of the selected job board sites.

Note: If the system can detect a reason the job posting will fail to be uploaded onto any of the chosen job board destinations, a warning message appears at the top of the preview screen.

At this stage of the posting process, you may also come across additional drop-down options for certain boards that were selected. If any additional information is required by a job board, such as an additional sub-category, it populates in this third step of the posting process.

Posting field details

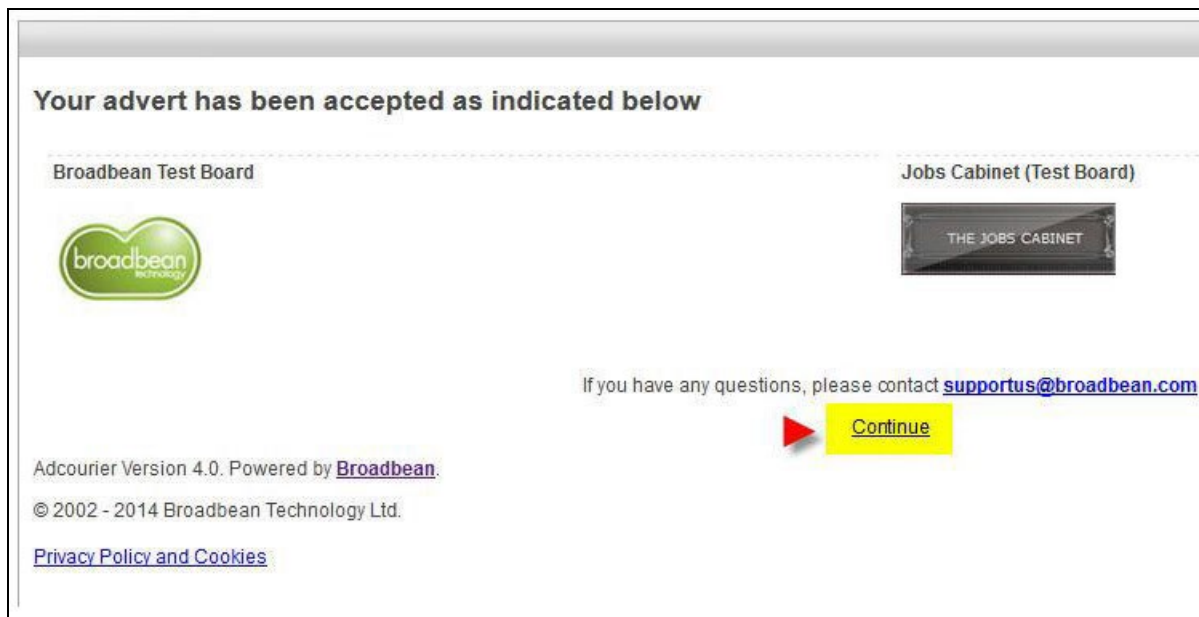
- **Posting Time** allows the user to specify when they would like the posting to be sent to the chosen job boards. Choosing a future posting date will cause the job to be sent to a holding queue, where Broadbean will hold the job until the selected time and date. Even if the user selects a date other than NOW/TODAY, the user will need to select the “Send Posting” button to proceed.

Contact Details may or may not be displayed in Step-3 depending on your individual account configurations. If your personal details are displayed, they are for Broadbean’s use only, and will NOT pass on to the selected job boards. This is simply to alert you to the email address to which Broadbean will be sending notifications whenever necessary (i.e.: job expiration notifications, failure notifications, etc.)

Apply Online URL is the link Broadbean will use to divert the applicants to your career site, where you will finish their job application. This apply URL will pre-populate for the user via the integration.

Destinations & Advertising Periods relates to the length of time a job will be live on the job board and is based on your agreement with each job board, as well as the job boards’ standard expiry terms. You should review the job duration listed and use the drop-down options (when applicable) to designate the appropriate posting time duration for each selected board.

Upon success of selecting Send Posting, the below confirmation screen will be displayed indicating that the advert (or job) has been sent to the listed job boards. You can exit the Broadbean posting process by selecting Close in the top right-hand corner, or by selecting Continue.



From here, you will be directed to the Rival Recruit Job Postings Details page.

Job Posting Details	
Posted Job Title:	Admin Assistant
Internal Job Title:	Administrative Assistant
Tracking Code:	33533
Hiring Workflow:	Default Workflow
Job Category:	Event Technology Leadership > Convention & Tradeshow > Consulting & Intern
Job Template:	Administrative Assistant (OP-001)
Job Status:	Normal - Int./Ext. Applicants
Number of Positions:	1
Number of Positions Filled:	0
Job ID:	174127
Job Description:	Position Overview Provide administrative assistance with processing the weekly and monthly financial documentation necessary to conducting business at the hotel properties. Key Job Responsibilities (Weight %) Billing (35%) Close billing statements in Lynx. Enter daily master billing into the hotel billing system (GEAC).

Viewing the status of posted jobs

After posting the job via the Broadbean API to one or more job boards, you can view the status of the posting for each of the selected job boards. The Job Board Status page provides you with visibility into job board postings done through Broadbean by providing a real-time snapshot.

Job board status column field details

Job Board Status						
Posted Job Title:	11826 Test Req Swedish (217309-052)					
Tracking Code:	217309-052					
Job Board	Status	Responses	Date Posted to Board	Expiration Date	Inventory	Actions
Jobs Cabinet (Test Board)	Being delivered	0			N/A	N/A
			Manage Postings	Repost	Deactivate	Return



Job Board

The name of the job board the job is posted to via Broadbean.

Status

Current status of the job posting (sent, failed, deleted, and future [if you chose a future posting time in Step-3]).

Responses

Number of job seekers who clicked the Apply link on the job board. This number does not indicate how many people went through the entire application process and submitted their resume.

Date Posted to Board

Date and time the job was sent to Broadbean.

Tip: If a future posting date was chosen, no date and time is shown until the job posting is sent to the selected job boards.

Expiration Date

Date and time job posting is planned to expire on the applicable job boards. Also shows the date and time a posting was deleted from a job board, if you chose to delete the job posting manually or the job posting was deleted for other reasons (job is filled and is deactivated in Rival Recruit).

Inventory

Remaining available inventory for the board. Only appears if this information is provided back from the job board. If information is not provided back, N/A is shown.

Actions

If a posting is active (and the job board supports this function), a View link appears. Click it to view the posting on the job board.

If a posting has expired or been deleted or the job board does not support this function, NA appears.

Manage Postings button

Click to manage job postings. (Only available to user who originally posted the job.)

Repost button

Click to repost jobs. (Only available to user who originally posted the job while the job is live. After a job is no longer live on any job board, the Report button is displayed for all Broadbean users.)

Deactivate button

Click to deactivate jobs. (Only available to user who originally posted the job.)

Return button

Click to leave this page.

Re-post job to Broadbean

To re-post a job posting via Broadbean, there are two options.

Option 1: Repost button

Job Board Status

Posted Job Title: 11826 Test Req Swedish (217309-052)

Tracking Code: 217309-052

Job Board	Status	Responses	Date Posted to Board	Expiration Date	Inventory	Actions
Jobs Cabinet (Test Board)	Being delivered	0			N/A	N/A

[Manage Postings](#)
[Repost](#)
[Deactivate](#)
[Return](#)



- Available on the View Board Status page.
- Choose this option if the posting has expired on all of the job boards.
- This option deletes the posting and replace it with a new posting created by completing a newly launched posting process.

Option 2: Manage Postings button

Job Board Status

Posted Job Title: 11826 Test Req Swedish (217309-052)

Tracking Code: 217309-052

Job Board	Status	Responses	Date Posted to Board	Expiration Date	Inventory	Actions
Jobs Cabinet (Test Board)	Being delivered	0			N/A	N/A

[Manage Postings](#)
[Repost](#)
[Deactivate](#)
[Return](#)



- Available on the View Board Status page.
- Choose this option if posting has not expired.
- Logs you in automatically into the Broadbean stand-alone app.
- Selecting Send with Changes option provides reposting options.
- Additional use case examples for using this option:
 - You want to post the job to additional job boards that were not selected during the original posting inside Rival Recruit.
 - You can also access metrics inside the Broadbean stand-alone app.

Deactivate/remove a Broadbean job

You can deactivate or remove a Broadbean job in several ways:

- Deactivate the job in Rival Recruit
- Remove the job from all job boards but leave active in Rival Recruit
- Remove the job from specific job boards

Deactivate a job in Rival Recruit

- When you deactivate a job, Broadbean removes the job during the timeframe established with the job boards.
- Many of Broadbean's job board relationships are real time (mostly US boards) while other relationships are batch feeds.

1. From the navigation bar, click **Jobs>Job Tracking**.
2. (If applicable) Filter to limit search results.
3. In the results list, select (click) the job's check box.
4. From the Take Action list, click **Deactivate** and click .
5. On the Confirmation pop-up, click **Continue**.

Or

When a candidate is moved to the **Hired** hiring stage by a recruiter or recruiting manager and the recruiter or recruiting manager selects **Yes** to the Close this Job? question.

Remove a job from all job boards but leave active in Rival Recruit

1. Select the **Deactivate** button on the Job Board Status page:

Job Board Status

Posted Job Title:

11826 Test Req Swedish (217309-052)

Tracking Code:

217309-052

Job Board	Status	Responses	Date Posted to Board	Expiration Date	Inventory	Actions
Jobs Cabinet (Test Board)	Being delivered	0			N/A	N/A

Manage Postings

Repost

Deactivate

Return



2. On the confirmation pop-up, click **Continue**.

A request is sent to Broadbean to deactivate the job from *all* job boards currently posted via Broadbean. The job is pulled during the timeframe established with the job board.

Remove a job from specific job boards

1. On the Job Posting Details page, select the **View Board Status** option.

The Job Board Status page opens.

2. Select **Manage Postings**.

The Broadbean standalone app opens.

3. Delete the posting from specific job boards.

Tip: Refer to the Broadbean User Guide for more details on the options available within the standalone app.

Access AdCourier (the Broadbean standalone app)

- On the Job Board Status page, click **Manage Postings**.
Or
- On the Jobs Dashboard page, click the **Broadbean Reports** link.
Or
- On the Open Jobs page, click  and click **Broadbean**.

JobTarget posting process

After JobTarget is enabled, some items are no longer available for retrieving information around jobs posted to job boards. This functionality was built around the legacy job posting process, where the data services team manually posted to the job boards on the client's behalf.

- **Posted Jobs** – This report (Analyze>Recruiting Activities) is no longer available to retrieve information about when a job was posted to a job board. However, all of the information regarding the date a job was posted to a job board, as well as when it is set to expire, can be viewed in JobTarget's OneClick application.
- **Job Board Effectiveness: Top 3** – This graph on the Jobs Dashboard page no longer shows information regarding the top 3 boards, as it is only able to pull this information for jobs posted via the data services team.
- **Job Board Postings** – This list (bottom of the Jobs Dashboard page) no longer shows any information regarding the jobs posted to boards via JobTarget. The most useful information in this list is the Submittals column. Going forward, similar information can be found within JobTarget's OneClick application.

Note: Refer to the JobTarget/OneClick User Guide you have received from your JobTarget Solutions Manager for more details on the options available within the stand-alone app.

Automatically pull deactivated or closed jobs from job boards

Jobs posted from within the ATS via JobTarget to third-party job boards are now automatically pulled from those boards when an ATS user (JobTarget user and non-JobTarget user) either closes the job upon moving a candidate into the Hired stage or deactivates the job.

Managing Broadbean, JobTarget postings

Manage a Broadbean job posting

- If you are set up as a Broadbean user, you can manage Broadbean postings.
 - Broadbean postings are handled on AdCourier, which is a Broadbean standalone app.
1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click  and click **Broadbean**.

The Broadbean Manage Postings page opens.

3. Find the posting you want.
4. Perform appropriate actions.

Manage a JobTarget posting

- If you are set up as a JobTarget user, you can manage JobTarget postings.
 - JobTarget postings are handled on the JobTarget app.
1. From the navigation bar, click **Jobs>Job Tracking**.

The Jobs page opens.

2. Click  and click **JobTarget**.

The JobTarget Manage Postings page opens.

3. Find the posting you want.
4. Perform appropriate actions.

EmployeeReferrals.com integration

Note: EmployeeReferrals.com is an optional feature. Not every client has this option. If you do not have this option, topics in this section do not apply to you.

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Service activation on OpenAdmin

Once you have established a contract with EmployeeReferrals.com, your client administrator must contact Rival Support to have the integration enabled in OpenAdmin (an internal Rival tool).

EmployeeReferrals.com jobs

After the integration is enabled, the EmployeeReferrals.com section appears on the following pages:

- Create Requisition
- Edit Requisition
- Clone Requisition
- Job Posting Details – Post Requisition
- Create Job posting
- Edit Job posting
- Clone Job posting

EmployeeReferrals.com section contains the following fields:

List on EmployeeReferrals.com

Defaults to Yes for all new requisitions and jobs. Yes indicates the job is to be included in the jobs export file that is sent to EmployeeReferrals.com to be posted on their site. Existing requisitions and jobs are set to No but can be changed.

Referral Bonus

Required if List on EmployeeReferrals.com field is set to Yes. No need to enter referral amount that will be paid to the referring employee once that person's referral has been hired. If you select No for the List on EmployeeReferrals.com option, the field is not required, and the default referral amount is 0.00.

Referral Points

Take advantage of EmployeeReferrals.com gamification option by entering referral points into this field. The amount of points to award for a given job is up to you. The default amount of referral points is 0.

Keywords

Keywords help an employee rank their connections for a specific job. For example, if a job is for a web developer, then keywords such as 'Java, Spring' help push connections to the top of the list of the employees matches.

Negative Keywords

Negative Keywords help to exclude false positive matches from the employee's list of matches. For example, a negative keyword of 'Coffee' for a job with keywords of 'Java, Spring' could be added because the job is for a web developer not a coffee barista.

Note: All keywords and negative keywords can be phrases or single words. Each keyword and/or negative keyword should be separated by a comma.

Hot Job

Selecting Yes makes the job 'featured' on the EmployeeReferrals.com site and gives it a higher priority in social postings. Featured hot jobs are also included in emails to employees.

EmployeeReferrals.com active job feed

Rival Recruit sends ER.com a nightly feed that includes only customers who have the feature enabled in OpenAdmin. The file contains active jobs that have been denoted to be included in a campaign (Yes to List on EmployeeReferrals.com).

Job details provided in the xml file:

Company ID	Company ID associated to the client Rival account
Company Name	Company name as it is stored in CentralAdmin
Company Domain	Rival Recruit company domain
Job ID	Unique Job ID that has been associated to the specific job being sent over to EmployeeReferrals.com.
Life Suite ID	Life Suite ID associated to the client's Rival Recruit account
Job Title	The title of the job that is being sent to EmployeeReferrals.com
Job Description	The job description that has been entered in Rival Recruit being sent to EmployeeReferrals.com
Job Category	Job category associated to the job within Rival Recruit.
Referral Bonus	The referral bonus that has been entered within Rival Recruit, which is what the referrer will receive upon his referral being hired for the job.
Referral Points	Clients have the option to add a gamification to the referral process. They can assign referral points in addition to the referral bonus or instead of a referral bonus. Employees can then trade in those points for rewards that have been selected by their employer.
Keywords	Keywords entered for the specific job (if they chose to do so) in Rival Recruit. Keywords help an employee rank their connections for a specific job.

Negative Keywords	Negative keywords entered for the specific job (if they chose to do so) in Rival Recruit. Negative Keywords help to exclude false positive matches for employees list of matching connections.
Is Hot Job?	The hot job flag makes the job 'Featured' on EmployeeReferrals.com site.
Job Owner's First & Last Name	First and last name of the Recruiting user who has been designated the job owner in Rival Recruit.
Job Owner's Email Address	Email address associated to the job owner.
Apply URL(s)	A list of all the Rival Apply URLs of specific jobs, depending on how many career portals the job is listed on. EmployeeReferrals.com will select the first one they find in this list.
Job Location	City, state, zip code & country, identifying where this job is located.
Required Skills	Required skills
Required Experience	Required experience
Currency	Currency

Candidate Details provided in the xml file:

Company ID	Company ID that is associated to the clients' Rival Recruit account
Company Name	Company name as it is stored in CentralAdmin.
Company Domain	Rival customer domain name.
Job ID	Unique Job ID associated with the specific job being sent over to EmployeeReferrals.com.
Job Title	Job title of the job that is being sent to EmployeeReferrals.com.
Tracking Code	Unique Rival tracking code associated to the job that is being sent to EmployeeReferrals.com.
Candidate First Name	First name of the candidate who has been referred to the job.
Candidate Last Name	Candidate's last name referred to the job.
Candidate Full Name	Candidate full name referred to the job.
Candidate Email	Candidate's email associated to the job.
Candidate Phone	Candidate's phone number associated to the job.
Resume ID	Resume ID automatically assigned to the candidate upon profile creation in Rival Recruit.
Hire Date	Date the candidate was moved into the Hired stage in Rival Recruit.
Start Date	Date the candidate will begin working for the company.

Stage	Stage the candidate is currently in.
Stage ID	ID associated to the stage the candidate is currently in.

Custom electronic forms (eForms)

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eForms overview

As a separately purchased module, you can collect additional forms from candidates online. Those forms can be sent and attached to the candidate profile and stored in Rival Recruit. Common examples of eForms include employment applications, background check consent forms, and disclosure releases.

Two collection methods:

- Forms are collected as part of the candidate's initial resume submission to open job postings via a customer hosted job listings page
- Forms are collected as a later step in the recruiting process via an email request to the candidate

Note: eForms are collected by recruiters or recruiting managers. As a hiring manager, you can view collected eForms through a candidate's profile.

Collect eForms from candidates using email

- Customized electronic forms (eForms) are most often collected from candidates later in the recruiting process by sending out a request for the form(s) to be completed and returned using the Rival Recruit email feature.
 - Recruiters can send a request to up to 25 candidates at a time.
1. From any candidate list, select the check box next to the candidate(s) you want to email.
 2. From the Perform Recruiting Activity list, select **Send Email**.

The message page opens.

3. Define the eForm request message. Enter a message or select a pre-defined message template.

Tip: The <eForm> merge field link *must* be inserted into the body of your message so that candidate(s) have the link to your eForm embedded in their message. If you are collecting multiple forms, then additional eForms are shown.

4. Click **Send Email**.

Candidates who receive the email can click the hyperlink in the message to view the online eForm in their web browser. The candidate must complete the form in one sitting, as the form cannot be saved and reopened for completion later.

After candidate completes the eForm, the recruiter who requested the eForm(s) receives an email notification, indicating the forms have been completed and returned.

Collect eForms from candidates up front

Customized electronic forms can be configured to be collected initially from external or internal candidates through the Rival Recruit hosted job listing page. The custom eForm is built into the standard

Rival Recruit resume submission process and automatically attached to the candidate's profile when it enters the Rival Recruit system.

Managing collected eForms



If you are using the eForm module, eForms tab is available on a candidate's profile.

The collected eForm is stored in Rival Recruit as a separate HTML file attachment.

View collected eForms

- Click the **View** link.

You can review the full form submission, print a hard copy, or download the HTML eForm for use outside of the system.

Download collected eForms

- Click the **Download** link.

You can download and save the HTML eForm for use outside of the system.

Edit collected eForms

- Recruiters click the **Create Modified eForm** link to create a copy of the completed eForm. You can modify the copy while keeping the original intact.
 - Editing collected eForms is available or not based on settings configured for your organization.
- Access a candidate's candidate profile.
 - Click the eForms tab.
 - Click the **Create Modified eForm** link.

The Completed eForm window opens.

- Make your changes.
- Click **Submit**.

A copy of the modified eForm is saved and associated with the candidate.

Background checks

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Background check provider integration

Rival offers implementation services for integration with background check providers. It is a chargeable service.

If you integrate with a background check provider, you can:

- Initiate background report requests from within Rival Recruit
- Check the status requests from within Rival Recruit

All new background check partners must be coordinated through our partner, HRNX/Talemetry.

Initiate a background check request

- Permissions to initiate background check requests are available to users at the discretion of your Rival Recruit customer administrator.
 - You can initiate background check requests on candidate's one at a time. No bulk action is available.
1. Access a candidate's candidate profile.
 2. From the Select an Action list, click **Initiate Background Check**.

The Background Check Request form page opens.

For integrations that use eForms, data that has been collected via a previously returned eForm will pre-populate the Background Check Request form. If multiple eForms are available, the recruiter initiating the request is presented with a drop-down of the eForms on file. The selected eForm will populate the Background Check Request form.

3. Select reports or report packages to be provided for the candidate.

Selection choices are based on the reports and/or packages the recruiter has permissions to request.

4. Click **Submit** to post the data to the background check vendor.

If the submission is successful, you get an immediate confirmation that the vendor received the request.

Error messages indicate whether error is with Rival Recruit or background check service provider.

Review the status of a background check

- Typically the status and results of a background check can be reviewed within Rival Recruit if the vendor supports a method to retrieve and display this information.
- Background check results are not stored in Rival Recruit. All information associated with the background check resides with the background check vendor.



1. Access a candidate's candidate profile.
2. From the Select an Action list, select **Review Background Check**.

A new browser window opens and displays the current status or results of the background check.