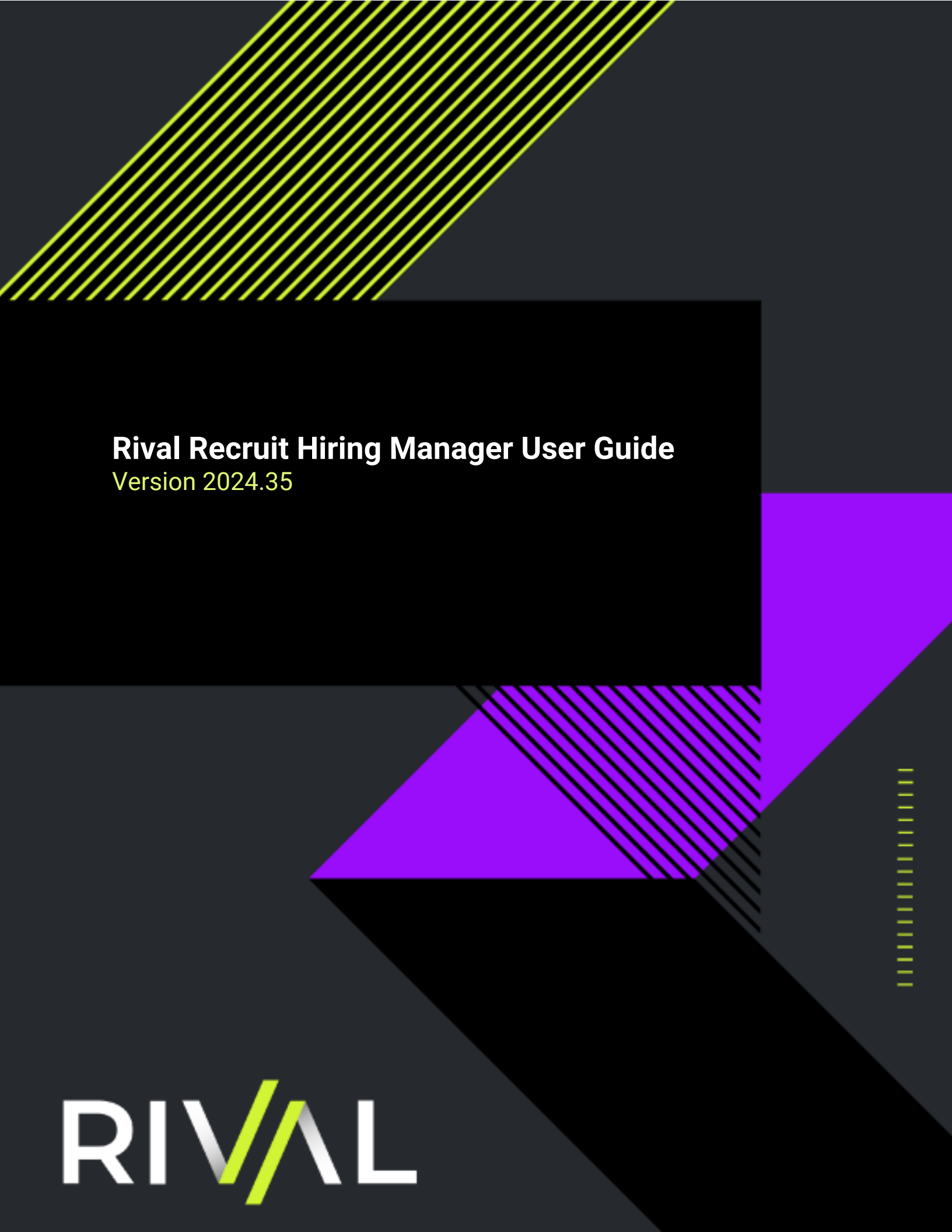




Rival Recruit Hiring Manager User Guide

Version 2024.35



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Getting started

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About this guide

This guide describes Rival Recruit. It is intended for hiring managers who are responsible for performing hiring-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**.

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.

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.

My Account

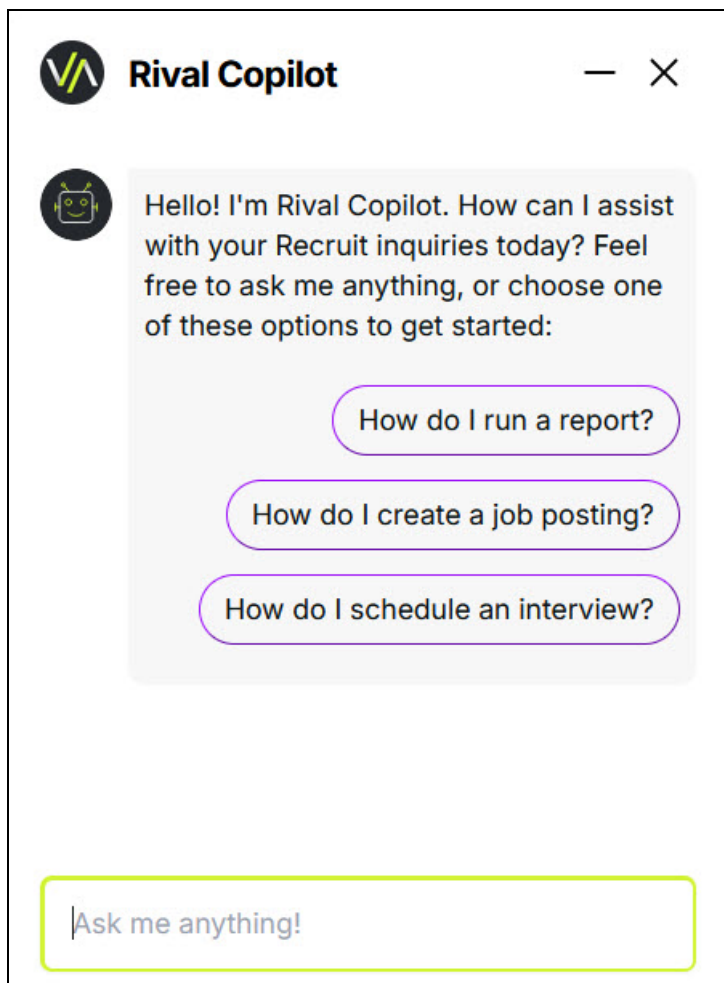
My Account contains information about your account:

- 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 7).
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>

Task List

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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 8) 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 8) 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 8) 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 8) 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 8) 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**.

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Jobs page

Open Jobs							
Edit Search							
Applied Filters Summary							
Status: Open Assignees: Joe RecruitingManager Sort By: Post Date Descending Results Per Page: 10							
9 Records Found							
[Take Action]							
☐	Job Title↑↓	Tracking Code↑↓	Resumes	My Review Requests	My Interview Requests	Location	Posting Status↑↓
☐	Account Executive CLONEED	217440-052	0	0 / 0	0 / 0	Atlanta	On Hold
☐	Account Executive	217439-052	0	0 / 0	0 / 0	Atlanta	Normal - Int./Ext. Applicants
☐	Account Executive	217438-052	0	0 / 0	0 / 0	Atlanta	Normal - Int./Ext. Applicants
☐	Buyer / Planner	217341-052	1	0 / 0	0 / 0		Normal - Int./Ext. Applicants
☐	Accountant	217339-052	5	0 / 0	0 / 0	Atlanta	Normal - Int./Ext. Applicants

Use the Jobs page to view and track open jobs assigned to you.

When you access this page, by default the filters are set to show open jobs assigned to you. However, you can change the filters if you want.

Columns are configurable. You have some columns by default, but you can add and remove columns to meet your needs. Here are some typical ones:

Job Title

The job title as it was defined internally to your organization.

Tracking Code

The tracking code (unique identifier) for the job.

Resumes

Displays the number of resumes associated with the job. Clicking on the number in this column displays the list of candidates. Depending on your assigned permissions in Rival Recruit, this column may not be accessible.

Note: This column may be hidden depending on your assigned permissions. Contact your Rival Recruit administrator if you cannot view this column.

My Review Requests

Displays the number of review requests and the number of completed requests (in parenthesis). Clicking on the number in the left column displays the list of candidates sent to you for review.

My Interview Requests

Displays the number of interview requests and the number of completed interviews (in parenthesis). Clicking on the number in the left column will display the list of candidates sent to you for interviewing.

Location

The location of the job.

Posting Status

Indicates if the job is actively being recruited for and controls which company applicant interfaces the job will be posted to. This field does not control posting to third-party internet job boards. Statuses are:

Normal–Int./Ext. Applicants allows for internal and external candidate submissions. The job posting will appear on the public/external and internal/intranet applicant interfaces. In addition, the job is available to Fee Agencies if any Fee Agencies are selected on the Department Information screen of the job posting process.

On Hold means the job is not currently being recruited for. If a job is created with an on-hold status, the job will not be posted to any public or internal interface.

Tip: If a job is created with a status other than 'on hold' and posted to one or more third-party job boards (i.e. Monster, Career Builder, etc.) and then placed on-hold after posting, the job will not be pulled from the third-party job boards.

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

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

Executive means the job is not displayed to the public but other methods are being 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 means the job is not yet approved but the recruiting organization has begun efforts to recruit for the opening. The job will not be posted to any public or internal interface.

View all open (active) jobs assigned to you (hiring manager)

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

The **Jobs page** (on page 11) opens and displays all active jobs assigned to you.

Job Posting Details page

Job Posting Details

Posted Job Title:

Customer Service Representative

Internal Job Title:

Customer Service Representative

Tracking Code:

171694

Hiring Workflow:

Full-Time Workflow

Job Category:

Customer Service > Customer Service Rep I

Job Template:

Customer Service Rep I (0000000005)

Posting Status:

Normal - Int./Ext. Applicants

Number of Positions:

1

View job details

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

The **Jobs page** (on page 11) opens.

2. Click the job title you would like more information about.

The **Job Posting Details page** (on page 13) opens.

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**.

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.
- 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 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 41).
- The Evergreen Job Postings report 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 can be filtered to include or exclude evergreen jobs.

Resumes

Recruiters, recruiting managers, and hiring managers use the Resumes page to search for candidates using keyword searches as well as basic or advanced filters. Search results can also be sorted based on their relevance to a job posting.

Candidate search

Searching for candidates is easy and flexible. You can create, manage, and save specific candidate searches. Search features include:

Search option	Description
Boolean search logic	Boolean search logic adds flexibility to your searches
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 .

Search option	Description
Basic search	Basic searches are default system searches. There are two: ▶ All candidates (that you have access to) entered in the last 90 days ▶ 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	Search filters help you narrow the scope of a candidate search. By using filters, you get a subset of candidates (the subset you really want) rather than all candidates.
Add and remove columns	Add or remove columns to tailor search results to your needs.

Resume quick search

1. From the header, toggle the search box to **Candidates**.
2. Enter a candidate's name and press **Enter**.
The Resumes page opens.
3. (If applicable) Filter to limit search results.
4. Click **Apply Filters**.

Select columns for search results

1. On the Resumes page, click  and click **Columns**.
2. In the Available Columns panel, click columns to move them to the Selected Columns panel.
3. In the Selected Columns panel, drag and drop columns to change their order.

Tip: Click **x** beside a selected column to not include in the results.

4. Click **Apply**.

Save resume searches

1. On the Resumes page, click  and click **Save Search As**.
2. Click **Save Search As** to save the search filter.

The Save this search window opens.

3. Type the name for the search.
4. Select the **Yes** check box for Make Default to have the search be your default search.

5. Click **Save**.

The search appears under My Searches.

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.

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 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.

Candidate Resume Profile page (job applicant)

Candidate Resume Profile

Results displaying 1 of 1

Job Score 4%	Qualified ☐ Yes ☐ No	Source GBI College Recruiting	Recruiter Joe Recruiter	Default Workflow
--	--	---	---	-------------------------

What would you like to do with this Candidate?

---- Select an Action --- ▼

Candidate

Christie Candidate
 222 New Address
 Jacksonville, Florida 32255
 United States
christie.candidate@silkroad.com
 Primary Phone 904.555.5555
 Secondary Phone: 904.555.5555

Primary Contact

christie.candidate@silkroad.com

Tracked For

[Accountant \(217340-052\)](#)

[Other Candidate Jobs] ▼

Preliminary Stages

Captured Online

Job Applicant

Captured Offline

Hiring Stages

Resume Review

Interviewing

Pre-employment

Screening

Summary

Resume / CV

Attachments

eForms

Evaluations

Activity Status

History

View candidate profiles from the Jobs page

- From the navigation bar, click **Jobs>Job Tracking**.
- Go to a job title and click the number in the Resumes column.

The Candidate Pool page opens.

- Click the name of the candidate to view their profile.

The **Candidate Resume Profile** (page 17) page opens.

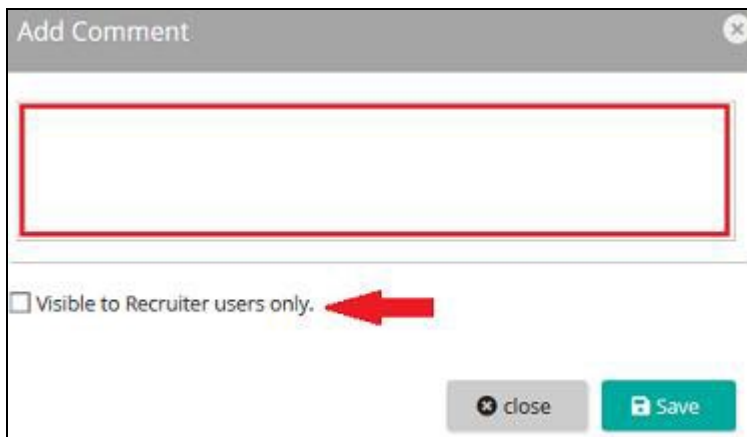
Add comment (from action menu)

- You can choose to add a comment regarding feedback and/or the candidate's qualifications, etc. The comments are visible to the recruiter. Your comments may be helpful during the candidate selection process.

1. From the **Select an action** list, select **Add Comment**.



2. Enter your comments in text box.
3. Checkmark **Visible to Recruiters Only**.



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**.

Review requests

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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 8) ▶ Candidate Profile ▶ Reviewed Resumes page (see "Review resumes on the Reviewed Resumes page" on page 20) (available only to hiring managers and only if enabled in your system)

View resume review requests

1. From the header, click  .

The **Task List** (page 8) 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 8) 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 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.

More action options

Here are other action items hiring managers can select:

- **Rank Candidate**—use this action to rank a candidate's ability to perform for your organization. Candidates are scored on a 1 to 5 scale. Ranking criteria are general (not job specific).
- **Add Comment**—use this action if you want to comment on the candidate. The Add Comment function should be used in situations where you want to record feedback but do not want to send that feedback to the Recruiter immediately.
- **Print Profile**—select the Print Profile action from the drop down to print a hard copy of the candidate profile. The output, by default, includes the candidate data from the top portion of the profile screen and the data from the candidate's Resume/CV tab.

- **Download this Profile**—the candidate profile can be downloaded out of the Rival Recruit system to your local computer in an HTML file format. To do so, select the Download this Profile action. Rival Recruit generates an HTML file of the candidate profile for you to save and share outside of the Rival Recruit system. Rival Recruit will not track any actions taken on a downloaded file.

Evaluation ranking

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. This feature is optional. The ranking criteria can be customized by your organization.

Manage Candidate's Ranking page

Manage Candidate's Ranking

Todd Van Deusen is associated with Payroll Specialist (171565)

COMPETENT TECHNICAL ABILITY

- Poor: Can't do the work. Doesn't meet minimum standards.
- Below: Can do the work, but needs added training, Supervision.
- Average: Can do the work w/normal training & supervision.
- Good: Exceeds expectations for the position.
- Excellent: Far exceeds expectations for the position.

☐ Excellent
 ☐ Good
 ☐ Average
 ☐ Below
 ☐ Poor

MOTIVATED TO DO WORK REQUIRED

- Poor: Lazy, passive, doesn't want to do the work. No interest in position.
- Below: Will do the work if urged or pushed. Not really a good fit for this work.
- Average: Self-motivated to do this type work w/normal supervision.
- Good: Takes initiative to do this work faster, better, and higher quality.
- Excellent: Totally committed to do whatever it takes to get it done. Always.

☐ Excellent
 ☐ Good
 ☐ Average
 ☐ Below
 ☐ Poor

TEAM- LEAD, COOPERATE, MOTIVATE

- Poor: Uncooperative, bad attitude, negative. Hides problems. Or too individual.
- Below: Will cooperate if asked. Needs urging to be involved with others. Avoids problems.
- Average: Fully cooperates with others w/o urging. Openly addresses problems.
- Good: Takes initiative to help others. Anticipates problems. Persuasive. Motivates others.
- Excellent: Persuades, inspires, motivates, leads, trains others. Takes pride helping others.

☐ Excellent
 ☐ Good
 ☐ Average
 ☐ Below
 ☐ Poor

Use this page to rank a candidate.

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 <i>(scale 0 to 5)</i>	4.27
CQE Evaluation Score <i>(weighted)</i>	
Failed CQE Question <i>(at least 1)</i>	N/A

Interview requests

Note: This section tells you about the interview functionality that comes with Rival Recruit. **Interview Scheduler** (see "**Interview Scheduling**" on page 46) 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.

Interview requests

Interview requests are requests from a recruiter. Hiring managers can choose to provide feedback on a candidate interview. Providing interview feedback directly through Rival Recruit ensures all feedback is tracked as part of the candidate's record, is reportable, and is shared with the individuals who need access to the data.

Interview Requests page

Interview Requests

Displaying 1 to 3 out of 3 records.

Page 1 of 1

All Interviews

Job Score	Request Status	Candidate Location	Requester	Job Title	Date Requested	Interview Info	Date Completed	Evaluation	CQE	
N/A	Pending	Chris C Wysack Phoenix, Arizona United States	Susan Harris	Program Manager (171613)	5/22/2016, 6:21 PM	6/10/2016, 6:21 PM Eastern Time Room 122 60 minutes			1.00	
N/A	Pending	Tom Seely Lexington, South Carolina United States	Susan Harris	Program Manager (171613)	5/13/2016, 6:21 PM	5/27/2016, 6:21 PM Eastern Time R5 Building 60 minutes			0.71	
N/A	Accepted	M. Paige Walker Summerville, South Carolina United States	Susan Harris	Program Manager (171613)	5/6/2016, 6:21 PM	5/15/2016, 6:21 PM Eastern Time No Location Specified 60 minutes	5/18/2016, 6:21 PM	Schedule Another Interview	0.93	

The Interview Requests page contains a listing of all your scheduled and completed interviews requests.

Only interview requests associated with active jobs are displayed. Once a job is closed, any pending/completed interview records associated with that job are removed from this page.

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.

Request Status

Indicates the status of the interview appointment. Clicking on the Pending link allows you to Accept or Decline the appointment. Accepting the appointment updates the Request Status to

Accepted. Declining the appointment removes the request from the page. Either selection notifies the Recruiter via an automatic email.

Candidate/Location

The full name of the candidate and his/her City/State/Country of residence. Clicking on the name of the candidate will start the interview feedback process.

Requester

The full name of the recruiter who created the interview request.

Job Title

The internal job title and the tracking code (in parenthesis) for the opening. Click on the job title to display a description of the job.

Date Requested

Date/time the interview request was initiated.

Interview Info

The scheduled date/time/location and duration of the interview.

Date Completed

The date the interview was completed. If the interview has not been completed yet, this column will be blank.

Evaluation

The Interview Evaluation value selected by the interviewer upon interview completion. If the interview has not been completed yet, this column will be blank.

Evaluation score (formerly CQE)

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.

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**.

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**.

Requisitions

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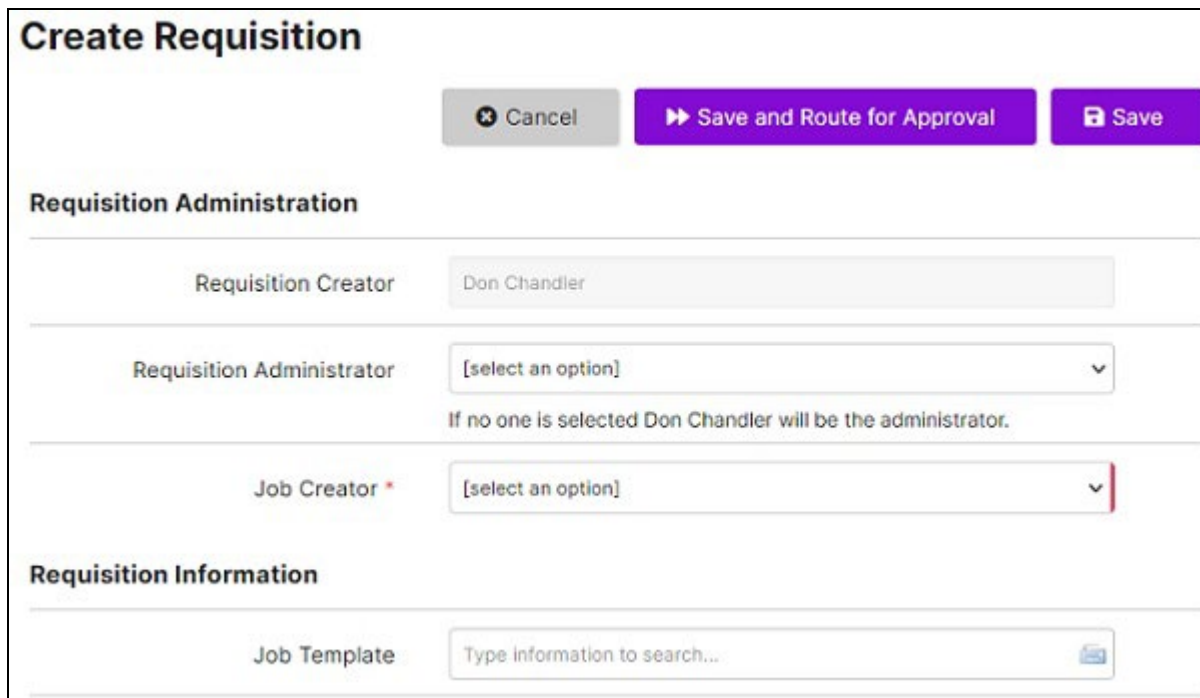
Requisitions

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



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 14). (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) Rival Recruit can now automatically change a job's posting status based on rules that you create here.

Add a rule.

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 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 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 (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 28) opens.

3. Enter information for the requisition.
4. (Optional) Add a rule to automatically change job posting status.
5. Click **Save** or **Save and Route for Approval**.

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:

Approvers

2 / 10 Remove All

1	Don Chandler	x
2	Joe Aleman	x

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:

Approvers

2 / 10 Remove All

Don Chandler x
 Joe Aleman x

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**.

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.

Hiring stages

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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.
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.

Hiring stage	Description
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.

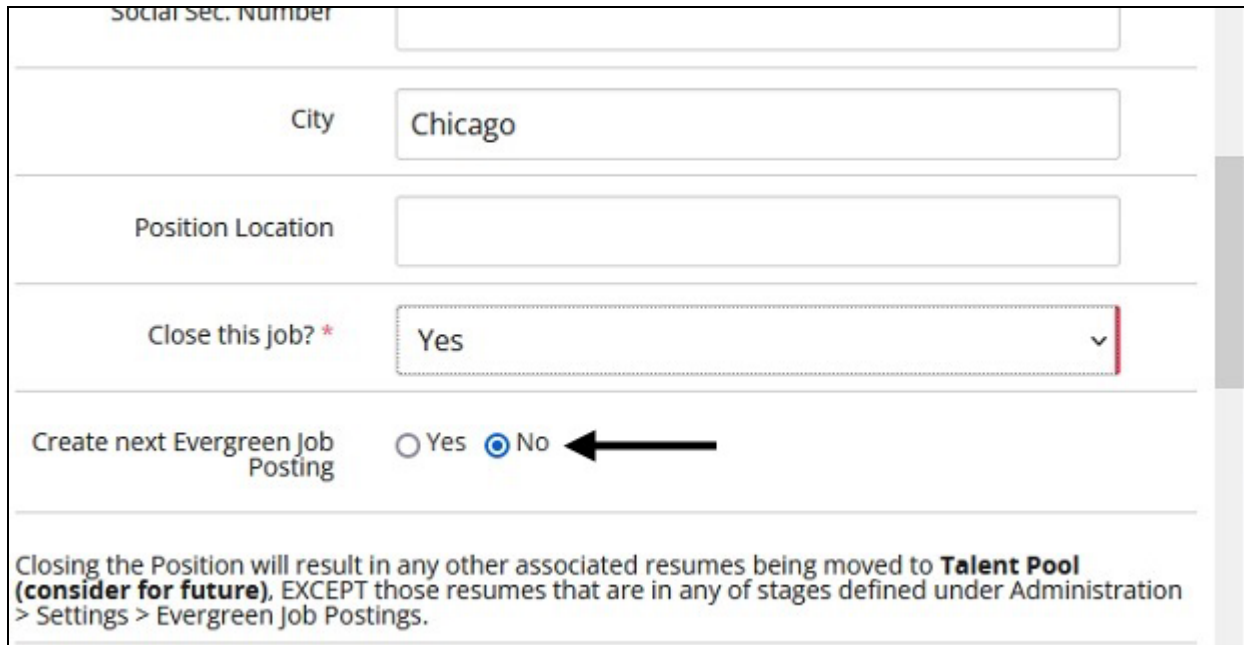
Move a candidate through hiring stages

- You must have the appropriate role and user permission to move candidates through **hiring stages** (on page 39).
 - A candidate's current hiring stage is highlighted in green.
- Access a candidate's candidate profile.
 - In the Hiring stages box, select a hiring stage.
 - Click **Select a stage** to move candidate.

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:



Social Sec. Number

City Chicago

Position Location

Close this job? * Yes

Create next Evergreen Job Posting ☐ Yes ☒ No

Closing the Position will result in any other associated resumes being moved to **Talent Pool (consider for future)**, EXCEPT those resumes that are in any of stages defined under Administration > Settings > Evergreen Job Postings.

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.

Shared hiring stages

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Shared hiring stages overview

Hiring managers use shared hiring stages to browse and search for candidates who are not in consideration for a current opening. This is an optional feature. If you do not see Shared Hiring Stages as an option on the navigation bar, your administrator has not enabled it.

Shared hiring stages are Talent Pool, Open Prospect, and Archives.

Note: Stage names are standard system labels and can be renamed by your Rival Recruit customer administrator. Changing the name of a stage does not change its function.

Shared Hiring Stages	
Stage	Candidate
 Talent Pool (consider for future)	599
 Open Prospects	25
 Archives (do not consider)	974

- The Talent Pool stage contains candidates who have applied to a job posting. The candidates are still considered viable for future employment even if they are not hired for the job they applied for.
- The Open Prospects stage contains candidates who submitted a resume without selecting a specific job opening and are therefore available for an open position.
- The Archives stage contains those candidates whom a recruiter has deemed inappropriate for employment at your organization.

Navigate candidate lists

1. From the navigation menu, click **Dashboard>Candidates**.
2. On the Shared Hiring Stages chart, click a hiring stage to view a list of candidates within the selected stage.

The My Hiring Stages page opens.

Tip: Use the **Return** link to return to the Shared Hiring Stages page.

Folders

In this section

Transition from folders to tags..... 43

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 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.

Interview Scheduling

In this section

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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 47) 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 50) opens.

3. Select a date range from which to select an interview date.
4. Select the expected duration of the interview.

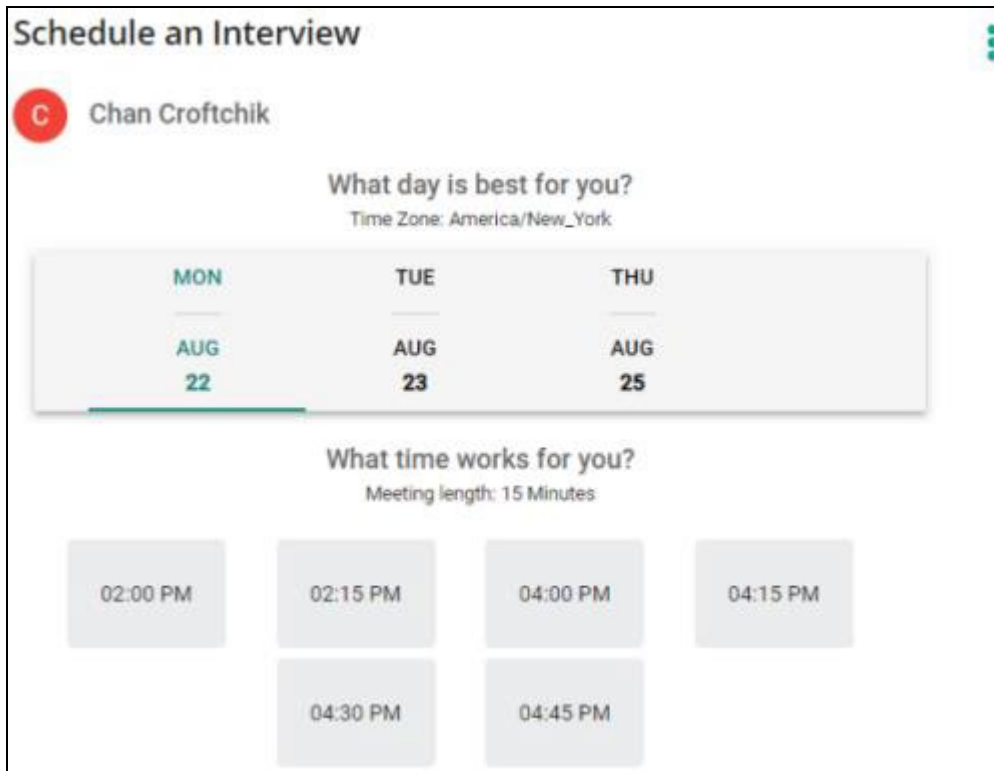
Note: The default is 15 minutes.

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 53) 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).
- From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 53) opens.

- Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

- For the interview you want, click **Expand Details**.
- 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.

- From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 53) opens.

- Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

- For the interview you want to reschedule, click **Expand Details**.
- Click **Reschedule**.
- 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.

- From the navigation bar, click **Candidates>Interviews**.

The **Interviews page** (on page 53) opens.

- Use filters to narrow down the list of interviews.

The interviews that meet the filter criteria are shown.

- For the interview you want to cancel, click **Expand Details**.
- 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 53) 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.)

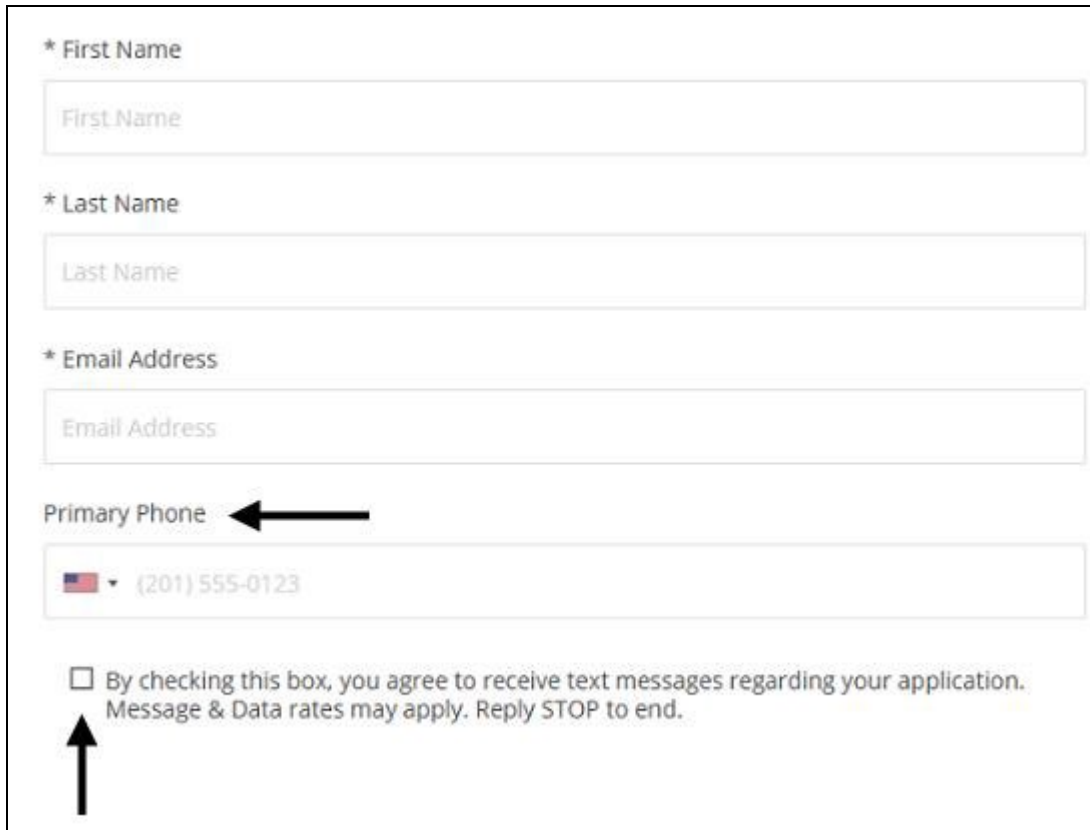
Setting up texting

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

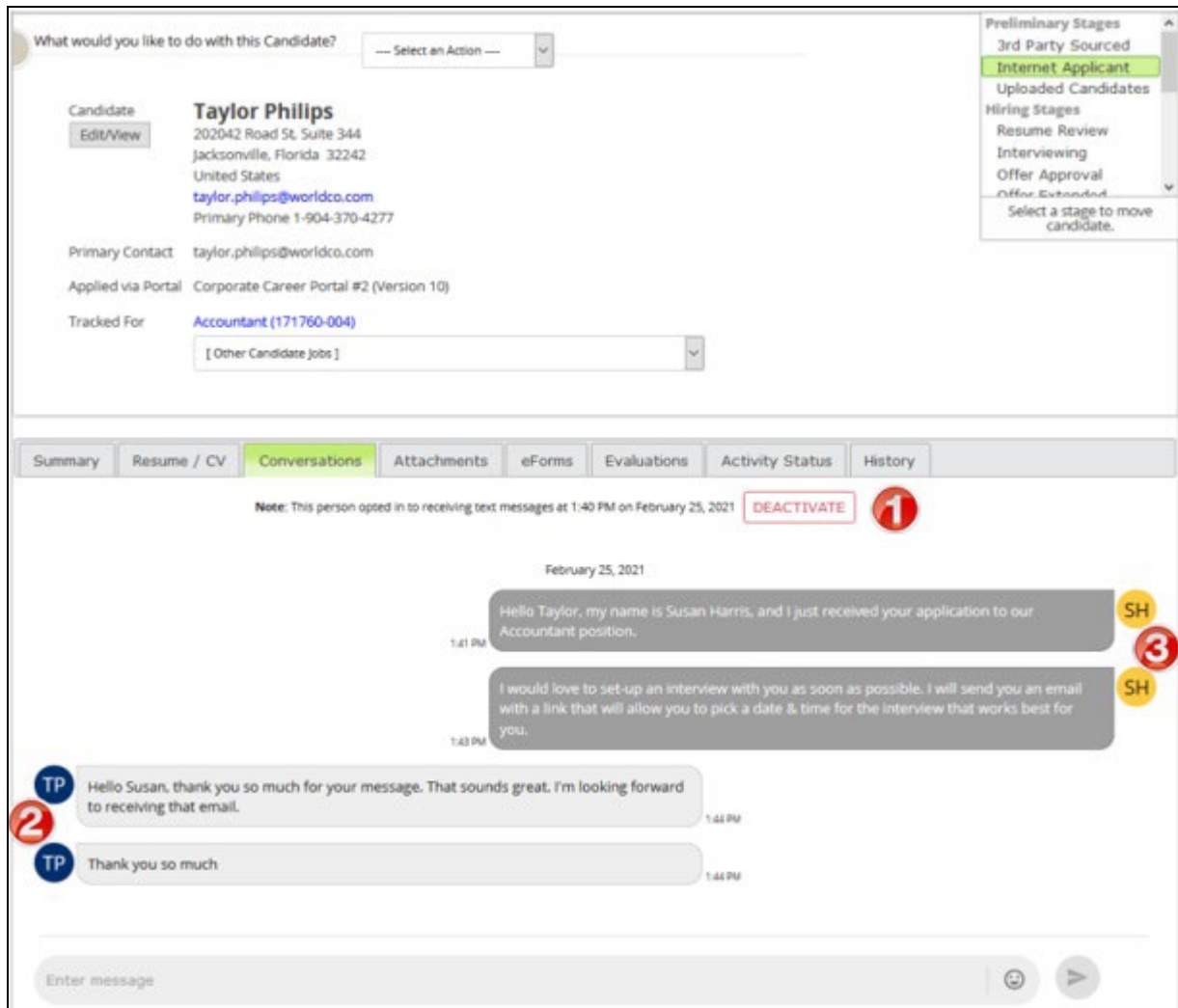
Conversations		
	Taylor Phillips	2 minutes ago
	Angela Duckett	2 hours ago
	Gregory Gibbons	4 hours ago

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
 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
 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 60) opens.

2. Click a candidate name to navigate to the **Conversations tab** (page 61) 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 60) 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**.

My Reports

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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**.