


## Interview Records

PCRecruiter tracks the interview process, from the moment a candidate becomes interested in a position, to the moment that they are moved out of the process or hired, with “Interview Records”. These records don’t necessarily need to correspond to an ‘interview’ in the traditional sense of the word, but are used in a more general way to signify an online inquiry, a resume receipt, a telephone call, a face-to-face appointment, and so on. By tracking each step of the process with Interview Records, an auditable trail of events is built for each candidate and their relationship with each position. Because “Interview Records” serve as the link between a candidate and a position (or “req”), a small ‘chainlink’ icon () will appear next to any linked candidate’s name in a search result listing. When the hiring process is complete, you will be able to view all of the candidates who have been associated with that position in any capacity, and a complete history of their involvement.

## Interview Types and Stages

Every Interview Record in PCRecruiter is marked with one of a dozen pre-defined Interview Types. These types are as follows:

- Presentation (*PRE*)
- Resume (*RES*)
- Telephone (*TEL*)
- In-Person (*INP*)
- Offer Stage (*OFS*)
- Offer Made (*OFF*)
- Offer Declined (*DEC*)
- Offer Accepted (*ACC*)
- Contract/Temp (*TMP*)
- Hire (*HIR*)
- Out-of-Process (*OUT*)
- Other (*OTH*)

Each of the hard-coded types can be sub-categorized into any number of “Interview Status” codes by the System Administrator of the database. For example, your database may have status codes under the “In-Person” Interview Type for *1<sup>st</sup> Interview* and *2<sup>nd</sup> Interview*, and a status code under “Telephone” for *Screening Call*, or a status under “Out-of-Process” for *Not Interested*.

### To define your database’s Interview Status codes:

1. Go to the SYSTEM button in the Main Menu
2. Click the “OPEN” button next to “Interview Status Codes”
3. Click “Add”
4. Enter the name of the code you wish to create in the “Code” box. (*10 character limit*)
5. Give the code a brief description in the “Description” box
6. Under “Link to Interview Type”, select the Type that this code should belong to.
7. By default, Interviews will be listed alphabetically by Status, but you may use the “Priority” option to define an arbitrary listing order.
8. Click “Save”

## Creating Interviews


You may start an Interview process either from the Position or the Name record involved. To start at the job, use the “Position” or “Job Req” button on the Company/Org Unit record that the position is associated with, or search for the position using the job search options in your main menu. Once you are on the job record, hovering over the “Interviews” button will allow you to create a fresh Interview record for a candidate, or a Rollup List of candidates. To begin from the Candidate’s Name Record, locate the Name and then use the “Interviews” option under the “More” menu to Add an Interview linking them to a position. Complete the Interview record, paying special attention to the Type and Status that you select. Once you’ve got an Interview associating a name with a position, you can proceed to the new “Applicant List” screen.

It is also important to know that the Candidate Web Extensions and Resume Inhaler can automatically link Applicants to a position in your database. These automatic links will have an Interview Type of “Presentation”, and the Status will define the details. If the candidate entered the database via the Candidate Web Extensions, the Status of their ‘Presentation’ interview will be “On-Line Job Inquiry”. If they placed the position into their Shopping Cart, they will have a ‘Presentation’ interview with a “Shopping Cart List” status. If the candidate was imported with the Resume Inhaler and was auto-linked to a position (see Inhaler documentation at [www.pcrecruiter.com](http://www.pcrecruiter.com)), the interview Status will be “Inhaled”.

## The Applicant List Utility

The Candidate/Applicant List utility in PCRecruiter is designed to speed up the process of moving Names from step to step in your Interview process. If you want to create interviews quickly without entering a lot of details, or if you need to move multiple applicants to a new step at the same time, you can complete the step via a fast ‘drag-and-drop’ style interface.

The Applicant List is divided into two sections:

- The left side displays a ‘tree’ type expandable menu, which includes each of the twelve standard Interview Types, each with their defined Interview Status options one level beneath them, and also options to view candidates with Interview records in the current day, week, or month. The “New” option shows “Presentation” interviews with no status, ‘LINKNAME’, ‘Referral’, ‘Vendor’, “On-Line Job Inquiry” or ‘Shopping Cart List’ status, for fast access to fresh applicants. The numbers displayed in parenthesis by each stage show the number of applicants currently at that Type/Status and the number of applicants who have been at that Type/Status in total for this position.
- The right side displays the Applicants/Candidates who are or have had an Interview of the currently selected type. People who are at the currently selected Type or Status will appear in the upper part of the screen, while those who have been moved along to another Type or Status are shown in gray below. “New” applicants (see above) will be marked with a blue arrow  as a visual cue.


Moving a person from one stage in the interview process to the next is as simple as holding down the mouse button on their name, and dragging them to the desired stage in the tree on the left. You may drag and drop multiple people at once by using the checkboxes in the far left column of the name list and then dragging any of the selected names. When a name gets moved to a new Type/Status, it will drop from the ‘current status’ area to the gray ‘History’ area below, allowing you to clearly tell who is at which step in the process.

Every time a person is moved to a new Interview Type or Status, an Interview record is created, logging that new step. The Interview's "Appointment" and "Arranged" date/time are set to the current date and time. An Activity Record is also created on the candidate's Name record. Of course, you can still create Interview Records manually with different dates and times by clicking the "Add" button next to the person's name, or the "Add" button in the menu bar. If you need to alter an existing Interview at any time, you can click the "View" links in the list to open the Interviews and edit the details. Clicking "Interview List" displays the same group of Interviews seen in the Applicant List area, but in a purely chronological list by Interview record.

If you use the checkboxes in the "Sel" (select) column, you can perform additional actions on one or more Names:

- "Rollup" will allow you to place the interviewees' Names on a list.
- "Delete" will remove the selected Interviews from the database, but keep in mind that removing Interview records means that you lose those steps in the history of the job, and thereby any reporting or accountability needed for the position record and candidate.
- "Copy" will allow you to link the selected interviewee Names to another Position record.
- The "Letter" option is used to send a bulk email to the selected names.
- "Compare" will present text-only previews of the candidates' resumes in a side-by-side format for review and comparison.
- "Routing" is used to send multiple candidate resumes and details via email.
- "Score" is used to compare candidate responses to Profile questionnaires.

The 'Setup' link in the upper right corner of the Applicant List is used to configure which fields will be shown in the layout. Any of the column headings may be clicked to re-order the records by that field, in ascending or descending order. The fields available are:

- "Status" – the status of the Candidate Name record (C, T, I, A, etc.)
- "Name" – column containing the candidate Name and link to Resume (if any)
- "Add New" – option to add a new Interview to the Name
- "Email Link" – option to email Interview Confirmation emails to candidates
- "Organization" – link to the Org Unit or Company under which the Name is found
- "Process" – option to open or manage Name Process checklists
- "Stage" – click the  to assign stages, based on the Rollup Stages configured in the Utilities area of the Rollup List screen. These stages can be used to visually organize your list of applicants, and can automatically write Activity records when they are changed.
- "Interviews" – option to view the Interview record for the Name
- "Rank" – you may arbitrarily rank Applicants from 1-100, which will alter the order in which they are listed under any Type/Stage they appear in.
- "Most Recent" – link, by date, to the last Interview for the candidate. *Note: These dates are chronological so "Most Recent" may be, for example, an In-Person Interview scheduled for two weeks from now.*
- "Interview Type" – displays the Interview Type of the 'Most Recent' interview record
- "Current Status" – displays the Interview Status of the 'Most Recent' interview record

**You will also find a "My Active Requisitions" option in the MyPCR welcome screen that will present *Applicant List* functionality for all of the current user's open reqs or positions.**

## Screen Details

Use the "All", "Today", "This Week" and "This Month" links to view applicants by the 'Appointment Date' of their next Interview record instead of Type or Status. If there is more than one Interview scheduled, the farthest one into the future will be used for the date.

Use "New" to display applicants with a "PRE" type interview bearing the "LINKNAME", "Referral", "Vendor", "On-Line Job Inquiry", "Shopping Cart List" or Empty status.

The 'Plus' icon indicates that there are Interview Status codes associated with this "Presentation" Interview Type. Clicking the 'Plus' icon expands this 'branch' so that you may drag the candidate to a specific 'Presentation' Status.

This (1/2) indicates that there is currently one applicant with a "Telephone" Interview. There have been two applicants with "Telephone" type Interviews, total (consisting of one applicant currently on that Type, and one that has moved on through the Interview process).

Clicking the main "Offer" icon expands or contracts this 'branch' of the menu, so that you may drag the candidate to a specific Offer Interview Type.

Click these items to view existing Hires or Contract placements for the current job. To fill a position, you must use the standard "Hire/Place" function from the job record itself. *You cannot drag-and-drop an applicant to these items!*

- All (5)
- Today
- This Week
- This Month
- By Interview Type
  - New
  - Presentation (1/3)
    - Resume (0/2)
    - Telephone (1/2)
  - In-Person (2/2)
    - 1st Int (1/1)
    - 2nd Int (1/1)
  - Offer
    - Offer Stage
    - Offer Made
    - Offer Declined
    - Offer Accepted
  - Other
  - Out-of-Process
  - Contract/Temp
  - Hires

Applicants in color are at the currently selected Type or Status.

Blue arrow indicates a "New" applicant.

Check this box to hide the Interview/Status History section of your screens.

Click "Setup" to define which columns should be visible in the applicant list.

SELECT PAGE PRE RECORD 1-3 OF 3  Hide History Setup

Set	S	Name	Add	Eml	Organization	Process	S	Int	Rank	Recent	Type	Curr Stat
<input type="checkbox"/>	C	Curtis Brown	ADD		Candidates	Open		View (1)	--	8/18/2005	PRE	On-Line Job Inquiry
<input type="checkbox"/>	C	John Byrne	ADD		Candidates	Open		View (4)	2	9/20/2005	TEL	1STCALL
<input type="checkbox"/>	C	Jacob Hertzfeldt	ADD		Default Company	Open		View (3)	10	8/24/2005	OUT	UNQUAL

INTERVIEW/STATUS HISTORY

Applicants shown in the gray list have been moved on to another Type or Status.

Click to send an Interview Confirmation email.

Click to view the details of the Applicant's Interviews.

Date, Type and Status of the Applicant's most current Interview.