Recruit Pack - Hiring Manager's Guide

20 September 2021

COMMERCIAL STATEMENT

HELPDESK & SUPPORT

For help and support, please contact TEAM Software Technical Support:

- **Opening hours:** 8am -5pm Monday - Friday (excluding weekends and public holidays)
- **Contact telephone number:** 0370 626 0400 (then press option 1)
- **Email:** support@innovise.com

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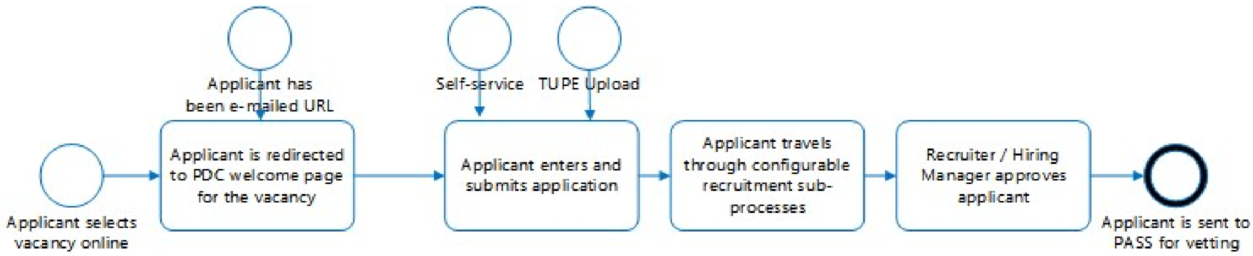
INTRODUCTION

Pass Direct Connect, referred to hereafter as PDC is a web-based system. It provides Hiring Managers with the ability to manage and assess Applicants based on the information they supply when they apply for roles. Hiring Managers are also able to monitor the process of screening. Meanwhile, Applicants are, themselves, able to directly interact with PDC during the recruitment process to enter their details as required. Agencies and similar can also access PDC to view details about vacancies. Each user type has their own specific login screen within PDC.

PDC enables the stages constituting the recruitment process to be fully configured. Emails are auto generated from user defined templates to keep the applicant fully informed during the process.

The outline recruitment process is shown below:



The guide specifically looks at PDC. It focuses on those features available to a Hiring Manager when logging in to PDC using the logon.aspx web page (different pages are used when other stakeholders log in).

Please Note: Any screen shots shown in this guide are from an unbranded version of the website. It is likely that your site will be aligned with your corporate branding.

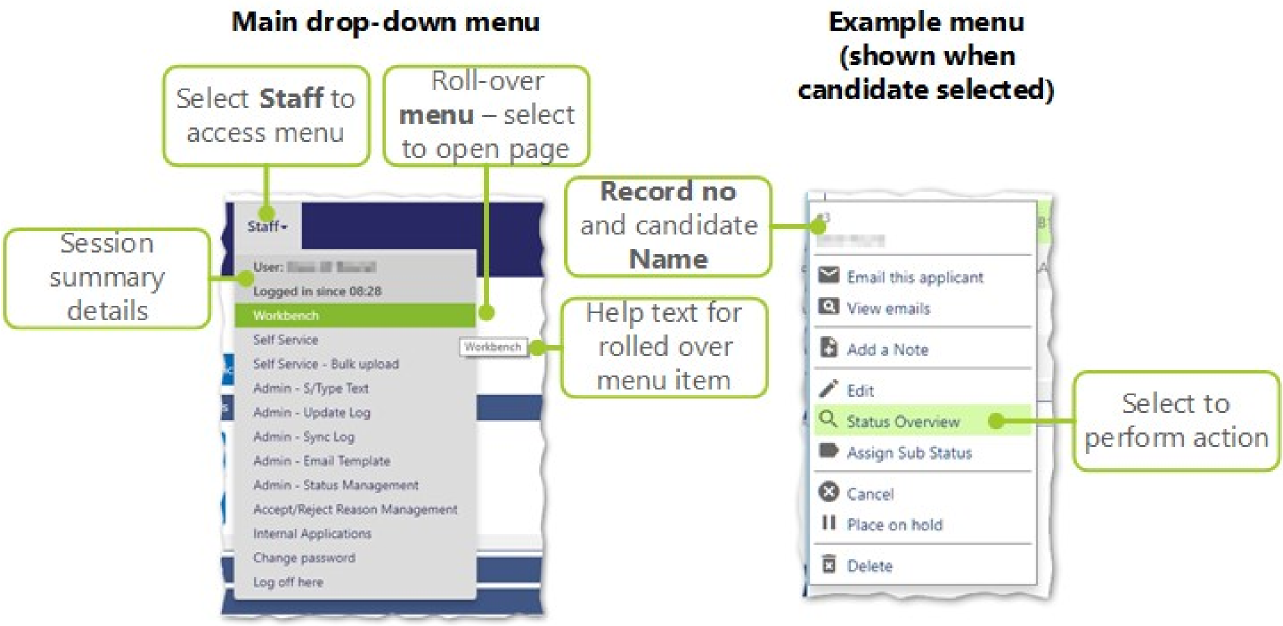
Please Note: Pass and PDC are highly configurable. As a result, the examples in this guide follow “standard” processes. It is likely that these will be different in your business, however, the principles of operating PDC will be the same, but the options / choices available may be a little different.

Please Note: This guide is not a PDC Admin Tool guide. Specific configuration of PDC attributes for example are not covered within this guide.

Please Note: This guide is not a Pass guide i.e. it does not include technical information about the initial setting up and configuration of items such as screening type rules that are present in PDC, but have been configured through Pass.

USER INTERFACE & NAVIGATION

Navigation through PDC is straight forward if you are familiar with how to use an Internet browser:



Main drop-down menu

Various screens are accessed from the main, drop-down menu. Simply select **Staff** at the top of the screen to access this. From within the menu, select the screen that you wish to access with your left-hand mouse button. The currently selected menu item will be highlighted and roll-over help text will be displayed.

Please Note: Be aware that menu content may differ from those shown based upon security level of user

Context specific menu

Throughout PDC, there are various context specific menus. The example above shows the menu when a candidate is selected from the Workbench screen. Summary text such as the **Record no** and candidate **Name** may be shown above. From within the menu, select an action with your left-hand mouse button. The currently selected menu item will be highlighted.

Drop-down buttons

Various sections within PDC have a drop-down button. By selecting this button with the left-hand mouse button, you will be able to expand / contract sections on screen.

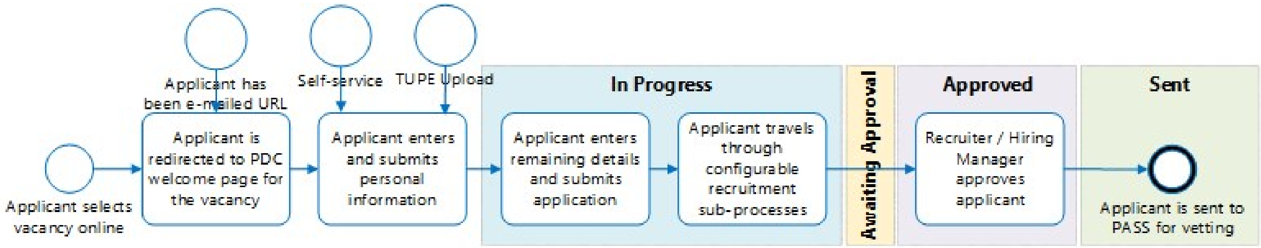
Roll-over buttons

Roll-over buttons in PDC are selected to perform tasks (such as filtering results and searching) or providing access to further actions. When a user rolls over the button, it will change colour. Select the button with your left-hand mouse button to perform the task.

RECRUITMENT PROCESS

The Recruitment Process is made up of a series of stages. Within PDC these stages are called statuses and sub-statuses. They are assigned to applicants to show which point in the process they have reached. The statuses and sub-statuses are configured by the super user to reflect the company's internal recruitment processes.

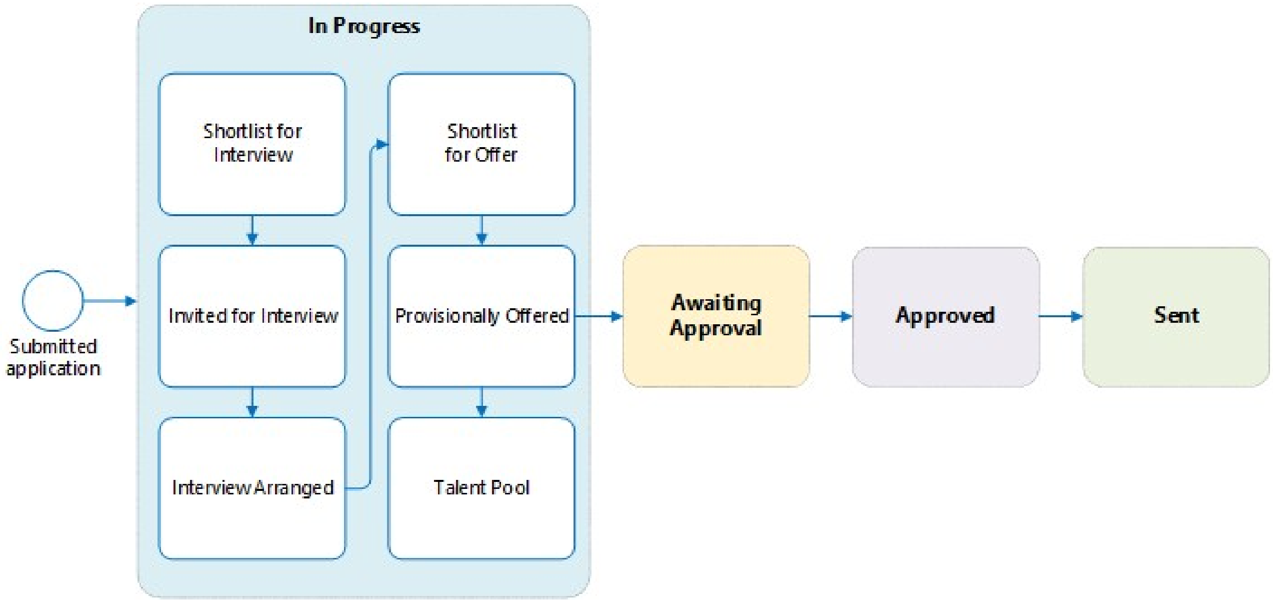
All applications and candidate records have a System Status assigned to them automatically by PDC reflecting where the application is in the process.



Sub-Statuses are a mechanism which can be used to customise the steps defining the recruitment process. By assigning an applicant a particular sub-status we can show that they have reached a particular point in the process.

The process flow above shows the system statuses and the stages of the process that they represent. Sub-Statuses are a configurable part of the "In Progress" system status and are used to define the recruitment process.

An example of this is shown below:



The System Status in this example are:

- In Progress
- Awaiting Approval
- Approved
- Sent

The Sub-Status (for In Progress) are:

- Shortlist for Interview
- Invited for Interview
- Interview Arranged
- Shortlist for Offer
- Provisionally Offered

- Talent Pool

In the example, during the recruitment process the Hiring Manager’s responsibilities could be:

- Review applicants for their suitability
- Actioning applicants by assigning sub-statuses or rejecting applications
- Editing applications when required, adding internal information to applications along with uploading documents to the system
- Approving the successful applications

GETTING STARTED

In this section, you will be guided through logging on to PDC as a Hiring Manager, navigating the interface and logging out. Before you can proceed, depending on how your company has set up Pass and PDC you will need your company's unique PDC website address. For Hiring Manager access, it will end with logon.aspx. Depending upon your configuration, you will also need your:

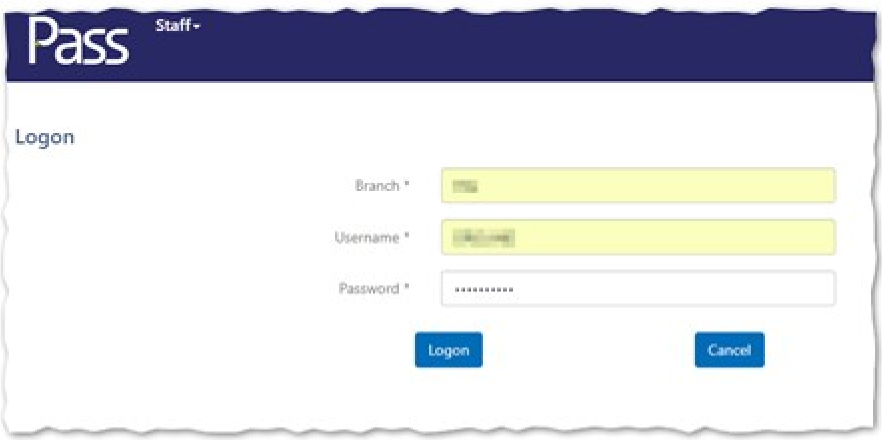
- **Branch, Username** and **Password** (if self-hosted)
- Registered **Email Address** and **Password** (if hosted on the FM Cloud)

If you're unsure how your company is set up, or do not have this information, please speak to your Pass Super User / Administrator or your TEAM Software representative.

Logging on as a Hiring Manager

Follow these simple steps:

- Open a web browser of your choice (for example Microsoft Internet Explorer, Microsoft Edge or Google Chrome)
- Open the PDC website using the address you have been given
- Enter your **Branch, Username** and **Password** as shown below (or if hosted on the FM Cloud, enter your **Email Address** and **Password** - there's no **Branch** to enter with this way of logging on
- Select **Logon**
- To reset the values entered, select **Cancel**



Tip: To gain rapid access to the PDC website, either bookmark it or store it as a short cut link

Logging off

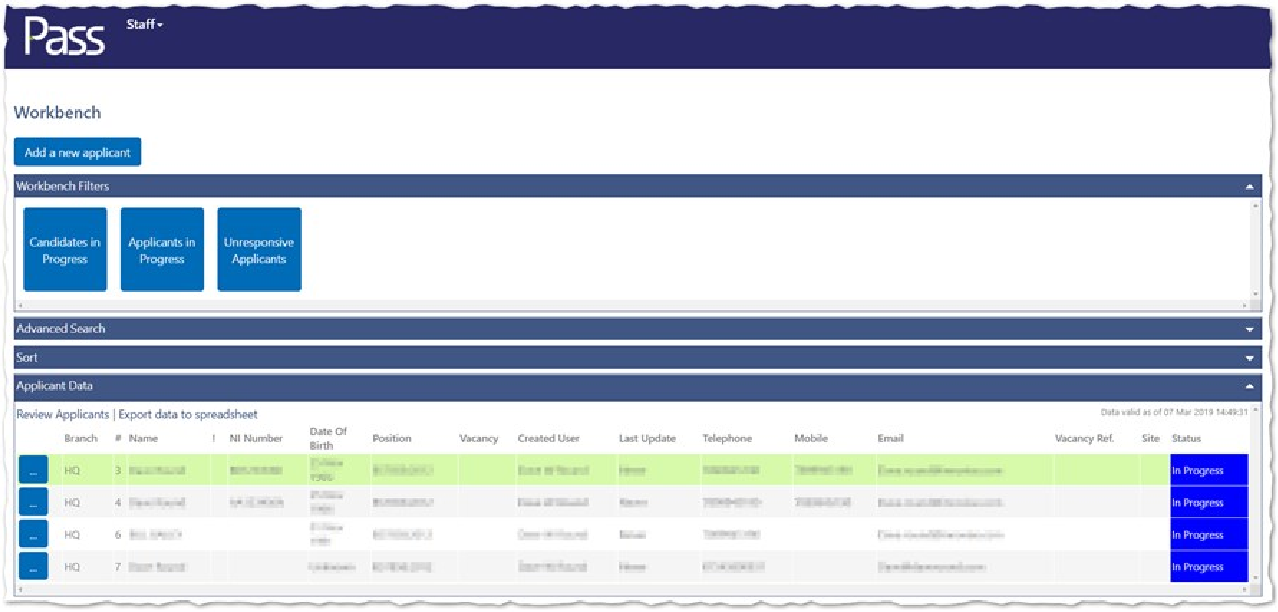
Follow these steps to log off:

- Select **Staff** from the menu
- Select **Log off here**. The page will be closed and you will be logged off

Tip: If you have logged off in error and wish to re-log on, select **Staff** and then **Staff Logon** from the menu

WORKBENCH

To access this part of the system, select **Workbench** from the **Staff** menu.



It is likely that the Workbench page within PDC (shown above) will be the page you use the most within PDC. It is best viewed as the PDC homepage. From this page, users can see the applications that have been made for the sites that they have security clearance for. The page comprises four collapsible sections that will be covered in detail in this section:

- **Workbench Filters** - that allows you to filter candidate / applicant data based on one of three choices
- **Advanced Search** - allows you to undertake both simple and advanced searches to determine which data is shown in the **Applicant Data** section
- **Sort** - allows you to sort the candidate / applicant data by the selected field in **Ascending** or **Descending** order
- **Applicant / Candidate Data** - displays the search results, in terms of candidate / applicant data in a tabular format

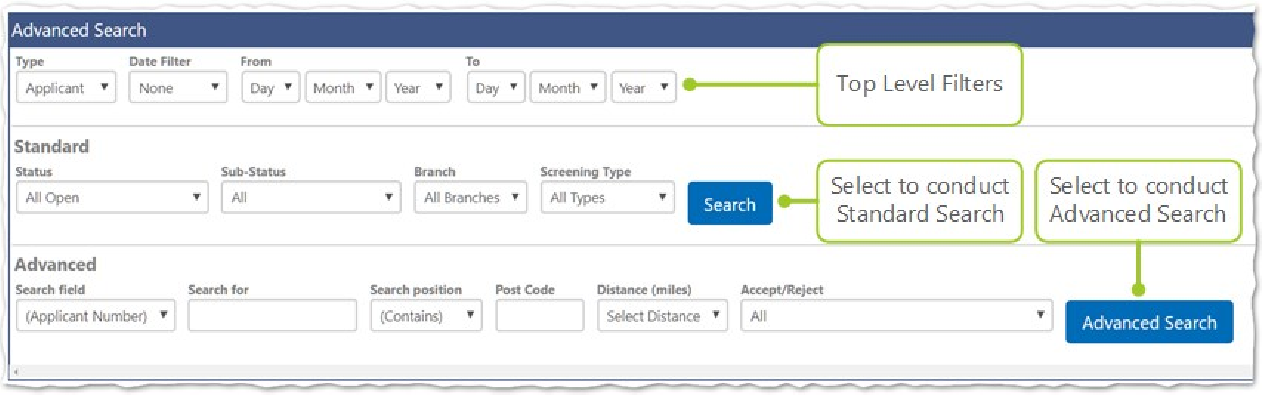
Workbench Filters Section

These top-level filters are used to select which applicant data to display. The filters let you choose one of three options:

- **Candidates in Progress** - show all applicants that have been passed on to PASS ready for screening, so that you can view their status
- **Applicants in Progress** - show all people currently applying in PDC that are still under the applicant process
- **Unresponsive Applicants** - show those applicants that have not responded to requests to make updates to their applications within a given number of days (as defined in a PDC System Setting- this is 10 days by default, but can be altered)

Simply select the appropriate filter to run it

Advanced Search Section



The advanced search section is broken down into three subsections, the Top Level Filters, Standard Search options and Advanced Search options. These are detailed below:

Top Level Filters Subsection

The top level filters comprise a Type and Date Filter:

- **Type** - select either **Applicant** or **Candidate**
- **Date Filter** - Select whether you wish to filter by **Created** or **Approved** date from **Date Filter**. Next, select your **From** and **To** date ranges using **Day, Month** and **Year**

Standard Search

The standard search allows you to define the applicants or candidates displayed in the workbench according to four commonly used fields:

- **Status** - lets you display applicants or candidates according to the PDC system status assigned to the applicant or Pass screening status assigned to the candidate. See the PDC and Pass Status lists below
- **Sub-Status** - lets you display applicants or candidates that have been assigned a configured sub-status. All - displays all applicants or candidates that either have no sub-status or have sub-status configured as **Include in Default Search** defined
- **Branch** - lets you display applicants or candidates for a selected branch
- **Screening Type** - lets you display applicants or candidates for a selected screening type. This defines the checks and references to be applied during screening

Common PDC System Status

All	Displays all statuses
All Open	Displays all “In Progress” and all sub-statuses configured as “Included in Default Search”
In Progress	Displays all “In Progress” regardless of sub-status
On Hold	Displays all that have been placed on hold
Cancelled	Displays all that have been cancelled
Awaiting Approval	Displays all applications that have been submitted with all mandatory fields completed and mandatory documents uploaded
Approved	Displays all applicants that have been approved but not yet sent to PASS for screening
Sent	Displays all applicants that have been flagged as sent, but have not yet been received in PASS

Common Pass System Status

All	Displays all statuses
All Open	Displays all except; Cancelled, Failed and Complete
Entered	The first stage of screening, the applicant has been transferred but screening has not yet commenced
Awaiting Approval	The applicants letter of authority has not yet been verified
In Progress	Screening is in progress
On Hold	The candidate has been placed on hold
Cancelled	The candidates screening has been cancelled
Awaiting Refs	Pre-checks have been completed and references have been sent awaiting replies from referees
Refs Failed	One or more references have failed
Time Failed	Screening has taken longer than the defined maximum period of time
Awaiting Sign Off	All pre-checks and references are complete, the candidate is awaiting sign off by an approved person
Failed	The candidate has failed screening
Complete	Screening is complete

Search Subsection

The advanced search allows you to display applicants or candidates:

- Matching a particular search term within a defined search field
- By proximity to a specified post code
- By an assigned approve or reject reason

Searching by Search Term

To conduct an advanced search on applicants or candidates, you must specify three items.

- **Search Field** - the data field to be searched
- **Search For** – the required search term
- **Search Position** – where within the data field to search for the search term

Searching by Proximity to a Specified Post Code

A post code search will let you display applicants or candidates with a home address within a specified distance of a post code. To display applicants or candidates with a home address within a specified distance of a UK post code, you need to complete:

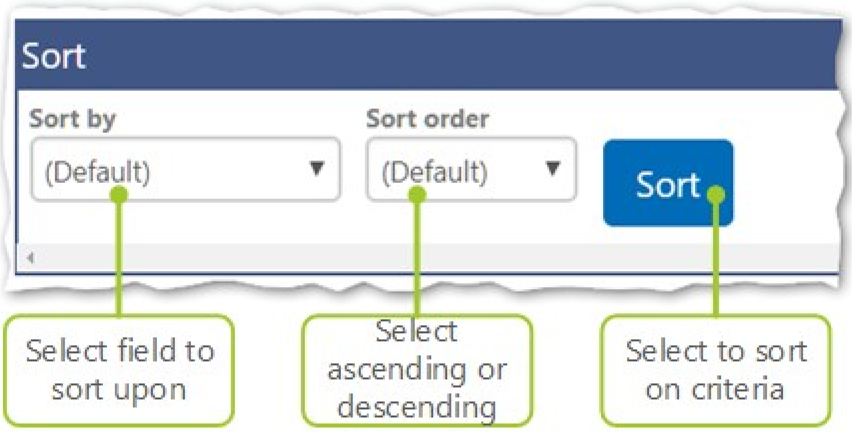
- A valid UK **Post Code**
- The **Distance (miles)** i.e. the radius from the applicant or candidates home address

Please Note: The Postcode Search feature is dependent upon the configuration of your system. If you wish for this feture to be configured, please speak to your TEAM Software representative to obtain further details

Searching by an Assigned Approve or Reject Reason

To search for applicants or candidates that have been assigned a particular approve or reject reason, select the reason for approval or rejection from the Approve / Reject. The values that you can select from are configured by your system super use.

Sort Section



To choose how applicants and candidates are going to be sorted:

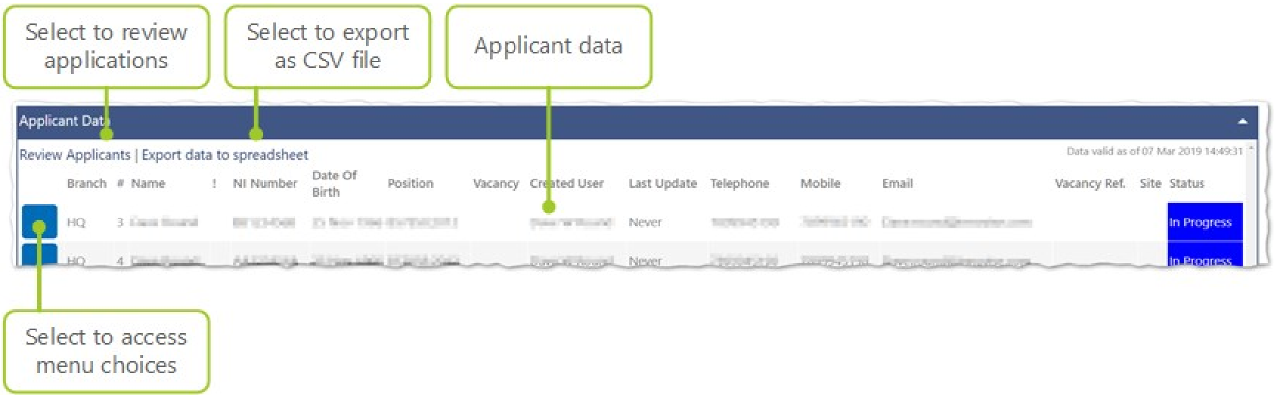
- Select what you are going to **Sort by** (see **Sort By Choices** below)
- Select the **Sort order** (be that **Ascending** or **Descending**)
- Select **Sort**

Sort By Choices

Application / Candidate Number	Unique number assigned by the system

Branch	The branch where the role is available
Date of Birth	The applicant or candidates date of birth
Name	The applicant or candidates name
NI Number	The applicant or candidates NI number
Position	The job role the applicant or candidate applied for
Last Updated	When the application / screening was last updated
Vacancy Reference	The reference number for the vacancy applied for (Only shown onscreen if the vacancies feature has been enabled)
Site Card Number	The Timegate Site Card Number (Only shown on screen if the vacancies feature has been enabled)

Applicant Data Section



Applicant Data

The **Applicant Data** screen shows the records for the applicants that meet with the search / filter criteria when either **Applicants in Progress** or **Unresponsive Applicants** are selected from the **Workbench Filters** part of the screen. These applicants can be actioned by selecting the light blue icon next to each row or by selecting the right-hand mouse button on the applicants record. Each applicant record can be reviewed and processed following selection. Additionally, the data can be exported for use outside of Pass/PDC in a spreadsheet format (see below). Basic information for each applicant is shown in each column. This comprises: **Branch, Number Name, NI Number, Date of Birth, Position, Vacancy, Created User, Last Update, Telephone, Mobile, Email, Vacancy Ref., Site and Status**.

Applicant Status

There are six different colours and associated status for the applicant status at the end of each row:

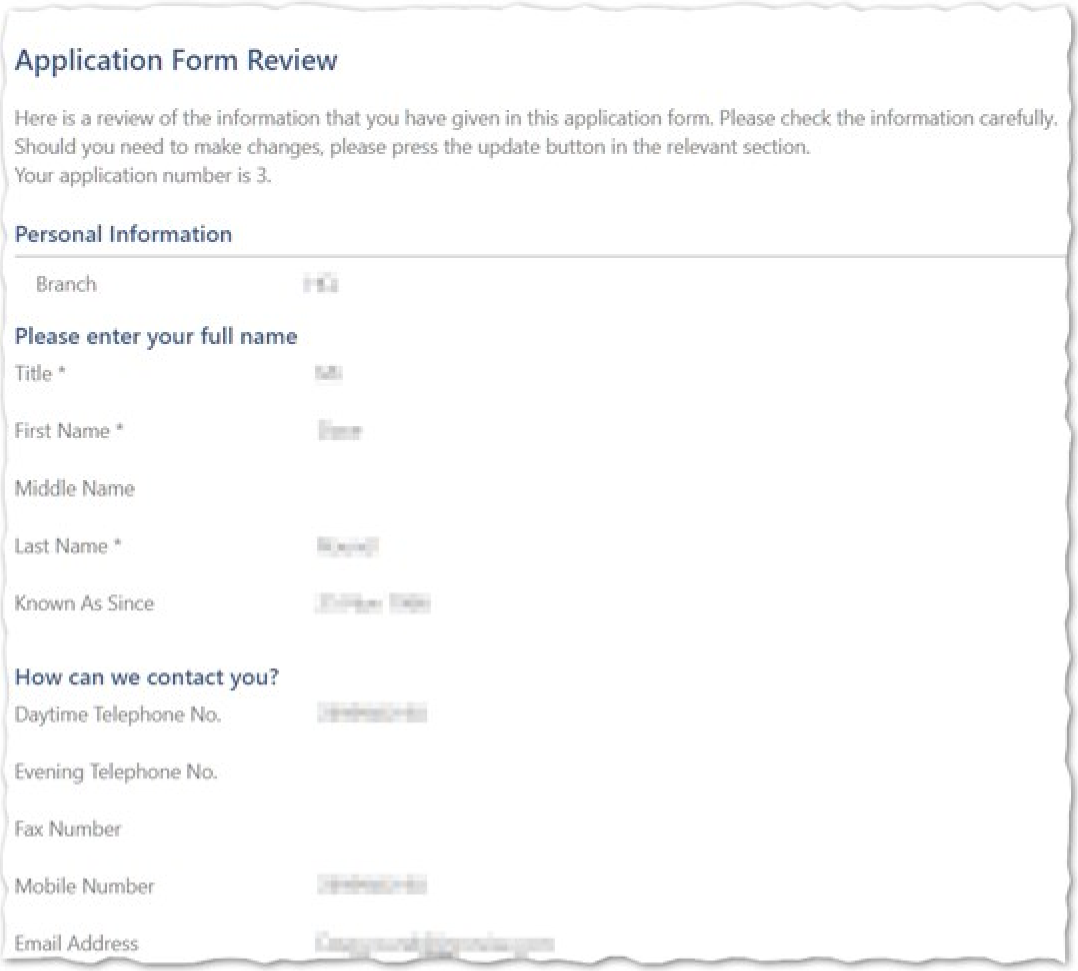
- Dark blue - In progress
- Light blue - Provisional confirmation has been gained
- Orange - On hold
- Purple - The particular reference or check has been completed but needs to be signed off by an authorised member of the screening team
- Green - The particular reference or check has been verified by a member of the screening team

- Yellow - The screening team have been unable to fully verify the information provided (i.e. it’s failed at the referencing stage) but the screening team hasve decided to accept the applicant
- Red - The reference has failed due to the screening team being unable to verify the information provided, or the information provided has not been acceptable.

The applicant status text shown with be replaced with sub status text, if a sub status is applied to an applicant’s status.

Review Applicants

At certain points during the recruitment process it will be necessary to assess applicants for suitability and action them appropriately. Review Applicants is a very quick way to gain summary information about whether an applicant is good not. It enables the user to see the current situation and determine the next steps. Select **Review Applicants**. Once selected, the records shown in the **Applicant Data** part of the **Workbench** can be viewed and reviewed by the user. All of the data for the first applicant on the list is shown:



Application Form Review

Here is a review of the information that you have given in this application form. Please check the information carefully.
Should you need to make changes, please press the update button in the relevant section.
Your application number is 3.

Personal Information

Branch

Please enter your full name

Title *

First Name *

Middle Name

Last Name *

Known As Since

How can we contact you?

Daytime Telephone No.

Evening Telephone No.

Fax Number

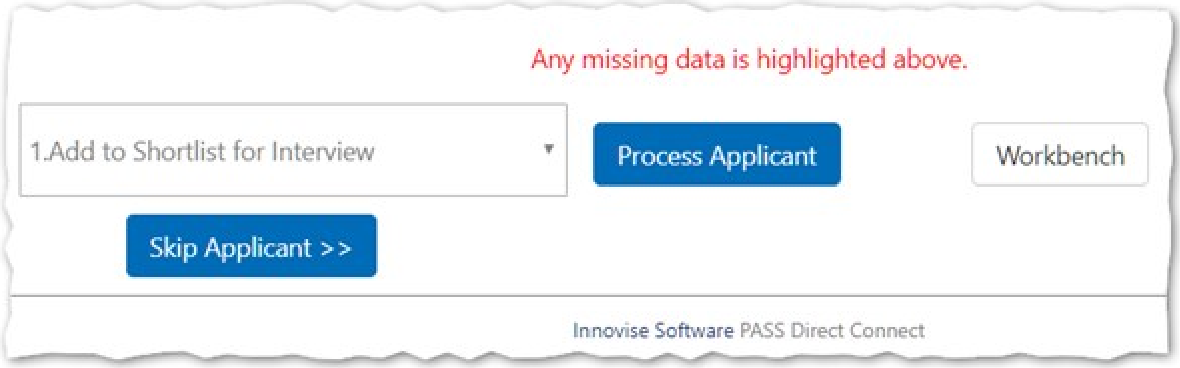
Mobile Number

Email Address

This information can be scrolled through. If the user wishes to move to the next applicant in the list, they can either process the current applicant, or skip them (as explained in the next section). Please Note: Review Applicants only works with applicants and not candidates.

Navigating the List of Applicants Opened for Review

Navigating through the list of applicants that are opened for review is undertaken using one of three options. Before proceeding, please note that if there is any missing data, it will be highlighted on the screen. The three options are:



1. Process an application:
    - Select the **Sub-Status**, or reason to **Reject** the applicant from the drop-down list
    - Once selected, select **Process Applicant**
2. Move to the next applicant record - select **Skip Applicant**
3. Return to the Workbench view - select **Workbench**

Rejecting Applicants from the Review Applicants Screen

- Select **Review Applicants**
- Select the reason to Reject the applicant from the drop-down list
- Select **Process Applicant**

The reason is assigned, the applicant cancelled and the next applicant in the list is opened. This is a very quick process, Rejection can only be done in this way, in this part of the system. There is no where else in the system that it can be undertaken in the same way.

Approving Applicants from the Review Applicants Screen

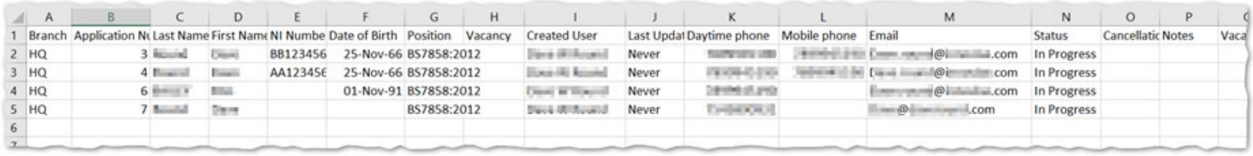
Applicants can only be approved and sent on to Pass if all mandatory information has been provided and all mandatory documents uploaded. Applicants can be approved with an approval reason applied from the **Review Applicants Screen** as follows:

- Select **Review Applicants**
- Select the required reason (Sub Status) for approval from the drop-down list
- Select **Process Applicant**

The reason is assigned, the applicant approved and sent to Pass for screening. The next applicant in the list is then opened.

Export Data to Spreadsheet

Select **Export data to spreadsheet** to generate a CSV file comprising all customer applicant and candidate information that is shown in the Applicant Data list (across the multiple pages). The CSV file will be created and downloaded by web browser. This can then be opened using a spreadsheet. An example of an exported CSV file is shown below:

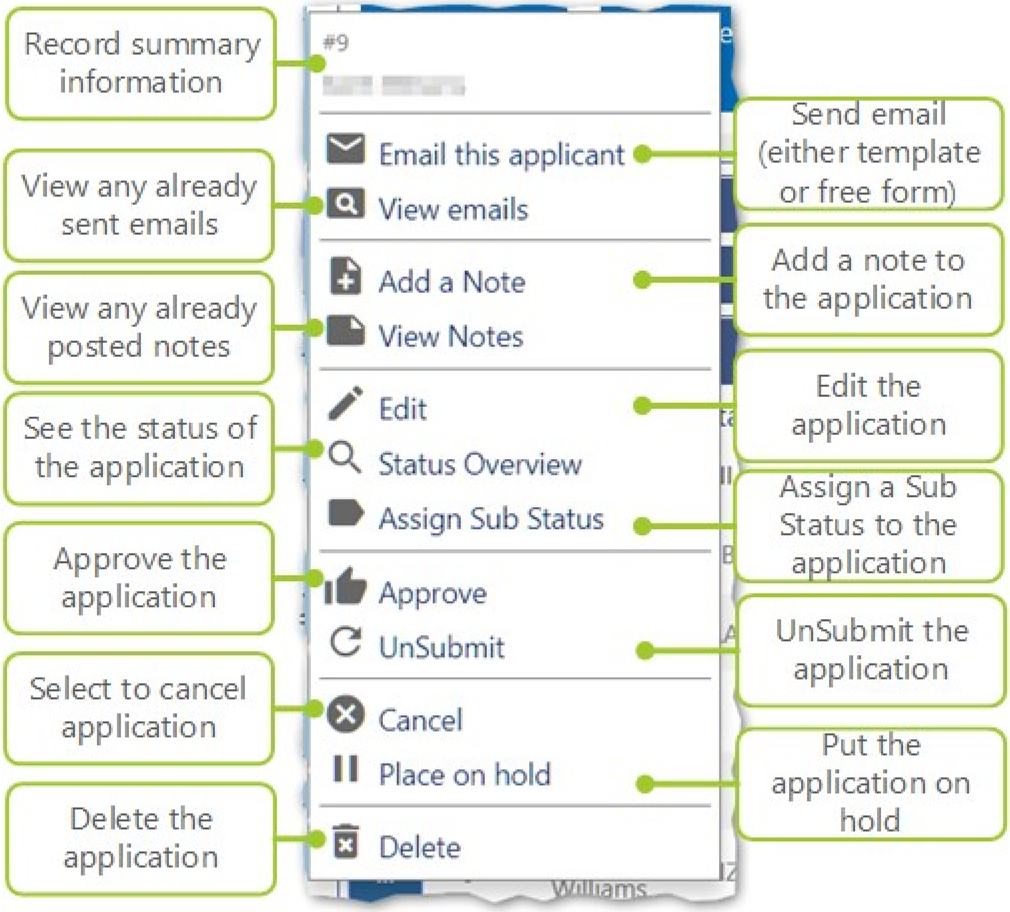


	Branch	Application Nu	Last Name	First Name	NI Numbe	Date of Birth	Position	Vacancy	Created User	Last Updat	Daytime phone	Mobile phone	Email	Status	Cancellatic	Notes	Vaca
2	HQ	3	[illegible]	[illegible]	BB123456	25-Nov-66	BS7858:2012		[illegible]	Never	[illegible]	[illegible]	[illegible]@[illegible].com	In Progress			
3	HQ	4	[illegible]	[illegible]	AA123456	25-Nov-66	BS7858:2012		[illegible]	Never	[illegible]	[illegible]	[illegible]@[illegible].com	In Progress			
4	HQ	6	[illegible]	[illegible]		01-Nov-91	BS7858:2012		[illegible]	Never	[illegible]		[illegible]@[illegible].com	In Progress			
5	HQ	7	[illegible]	[illegible]			BS7858:2012		[illegible]	Never	[illegible]		[illegible]@[illegible].com	In Progress			

Application Actions

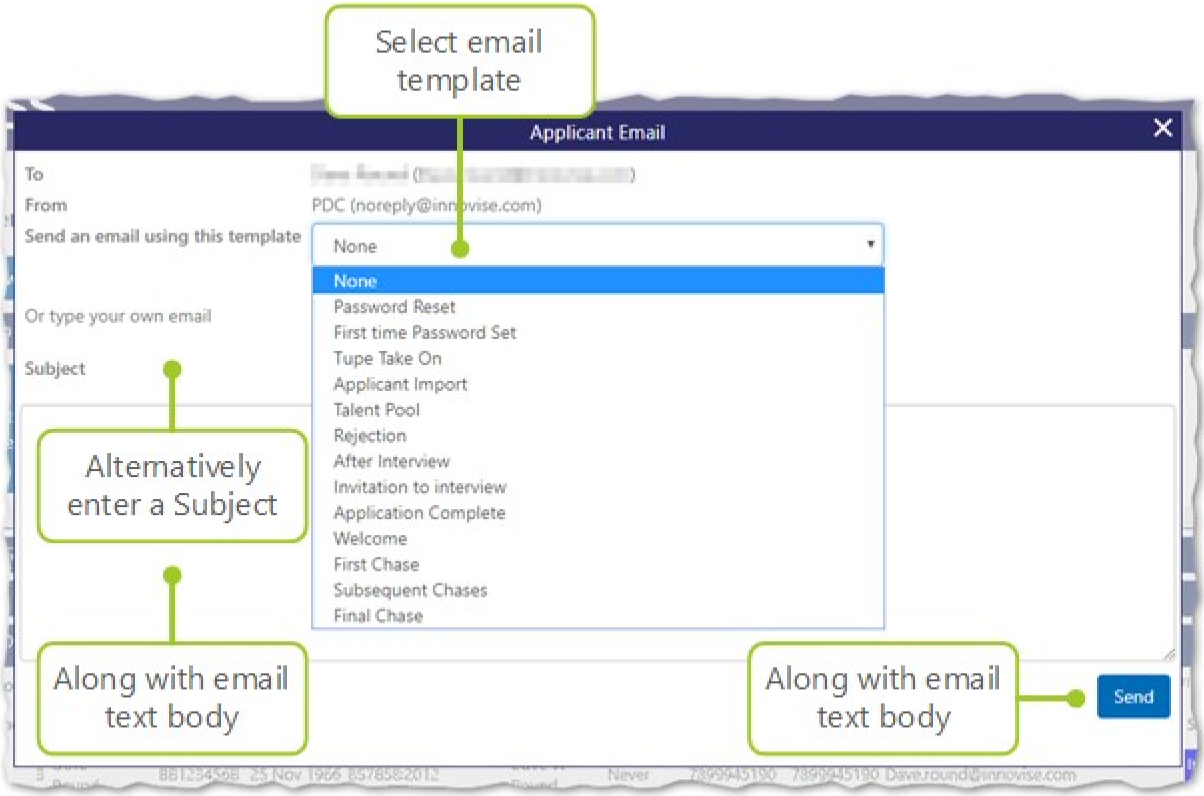
Accessing the Actions

When you select an application from within the **Applicant Data** window, there are a variety of actions that you can undertake. These are accessible by selecting **[...]** next to the application you wish to action. Alternatively, you can use your right-hand mouse button to access the action menu. The following is shown with a variety of choices:



Please be aware that there are further choices available from this menu that are context specific e.g. **Take off Hold** (in place of **Place on Hold**); **Unapprove** (instead of **Approve**) and, **Re-instate** (instead of **Cancel**).

Email this Applicant



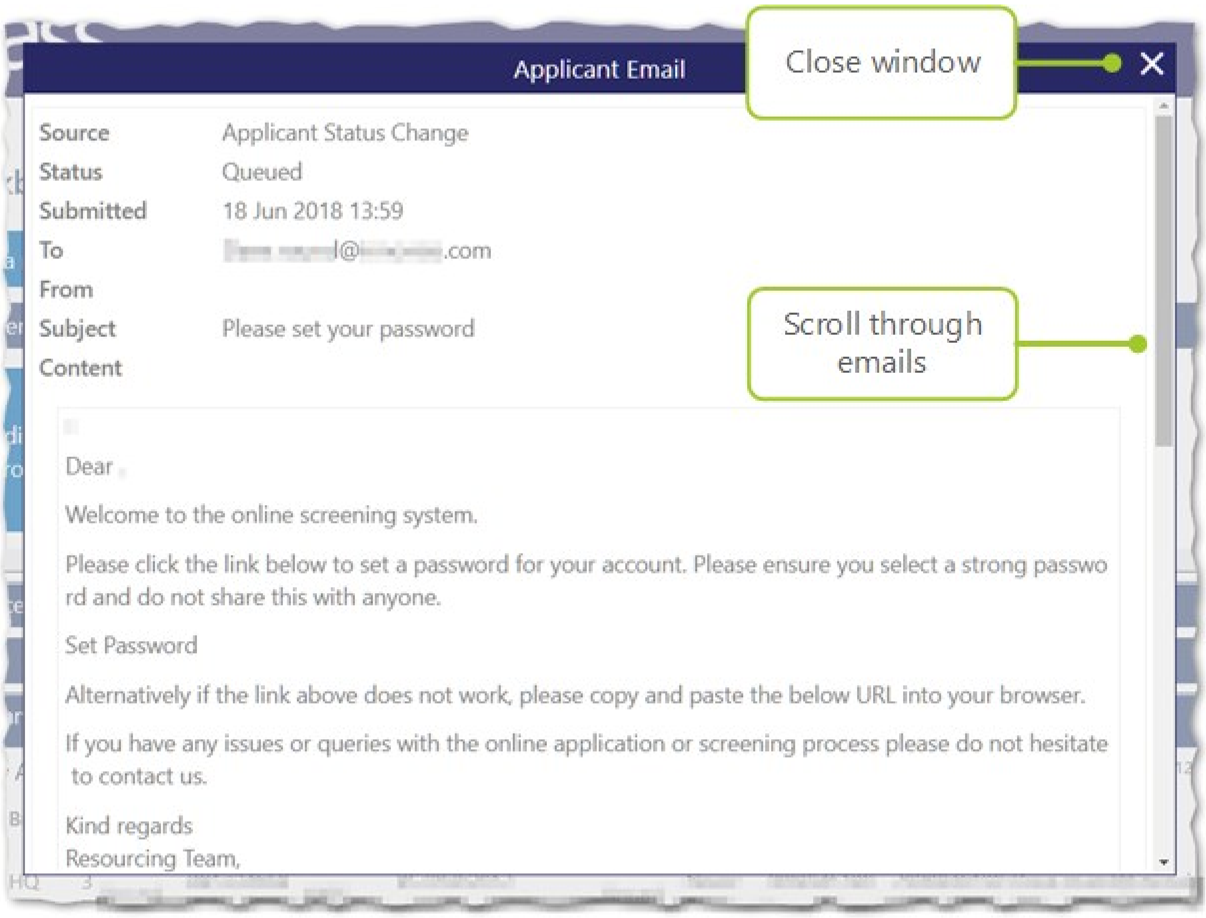
Having selected this menu option, you can either send an adhoc email to the applicant using a template, or by entering an email subject and message text body. Once you have selected a template from the drop-down list, or entered your text, select **Send**. Adhoc emails can be sent to the applicant at any stage.

Email templates are created from **Staff | Admin Email Template**. They may vary from those shown above. This option is dependent upon your security level. If you need this functionality and it has not been enabled, speak to your Super User.

Please Note: Any notes or emails that are sent out in PDC are not sent over to Pass in the future.

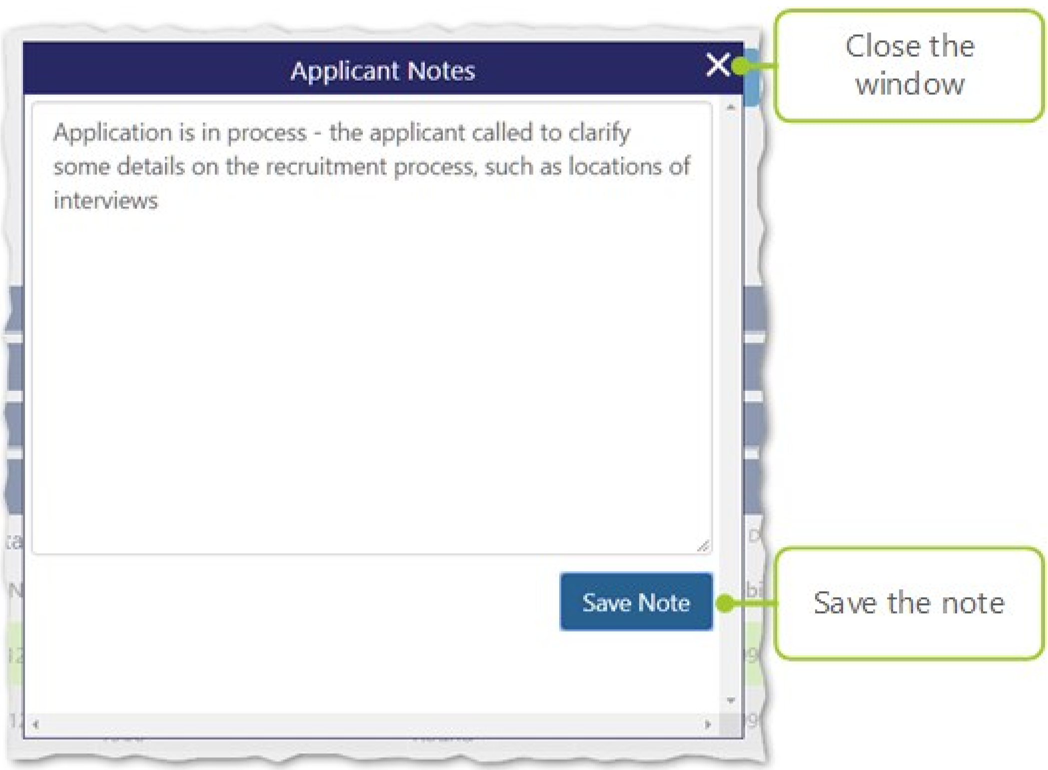
View Emails

This menu option enables you to scroll through the various emails that you have sent to the applicant as shown below:



Add a Note

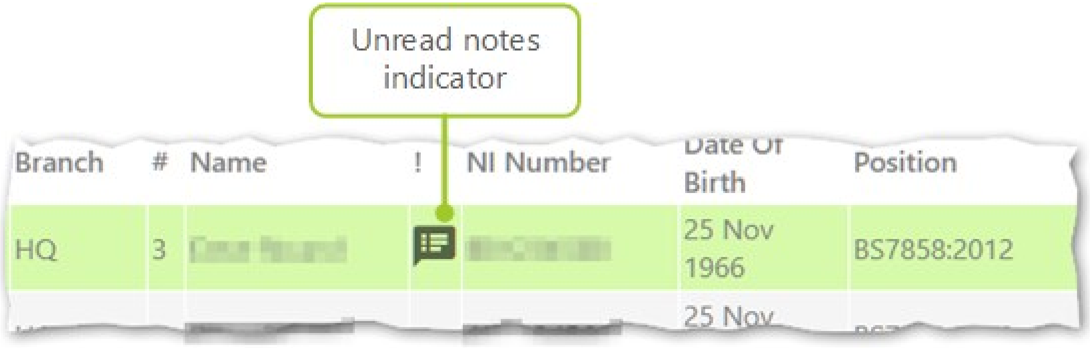
At any point in time, you may wish to add notes to the application, for example, interview dates and times. Please be aware that these notes are not transferred over to Pass. An example of the **Add Note** screen is shown:



Having selected **Add Note**, enter your note text and then select **Save Note**. You will see a message stating "Message Saved Successfully". Select **X** to close the window.

Please Note: Any notes or emails that are sent out in PDC are not sent over to Pass in the future.

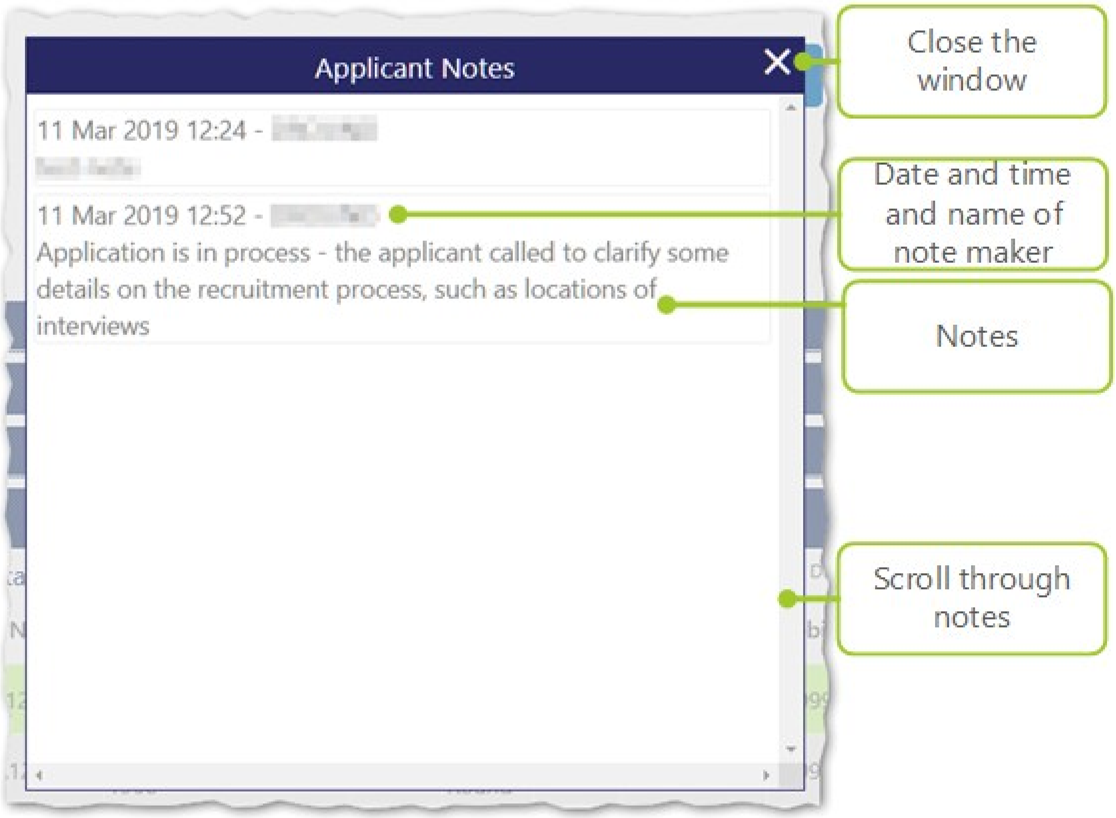
Unread notes are denoted as shown:



To view these, follow the guidance in the next section.

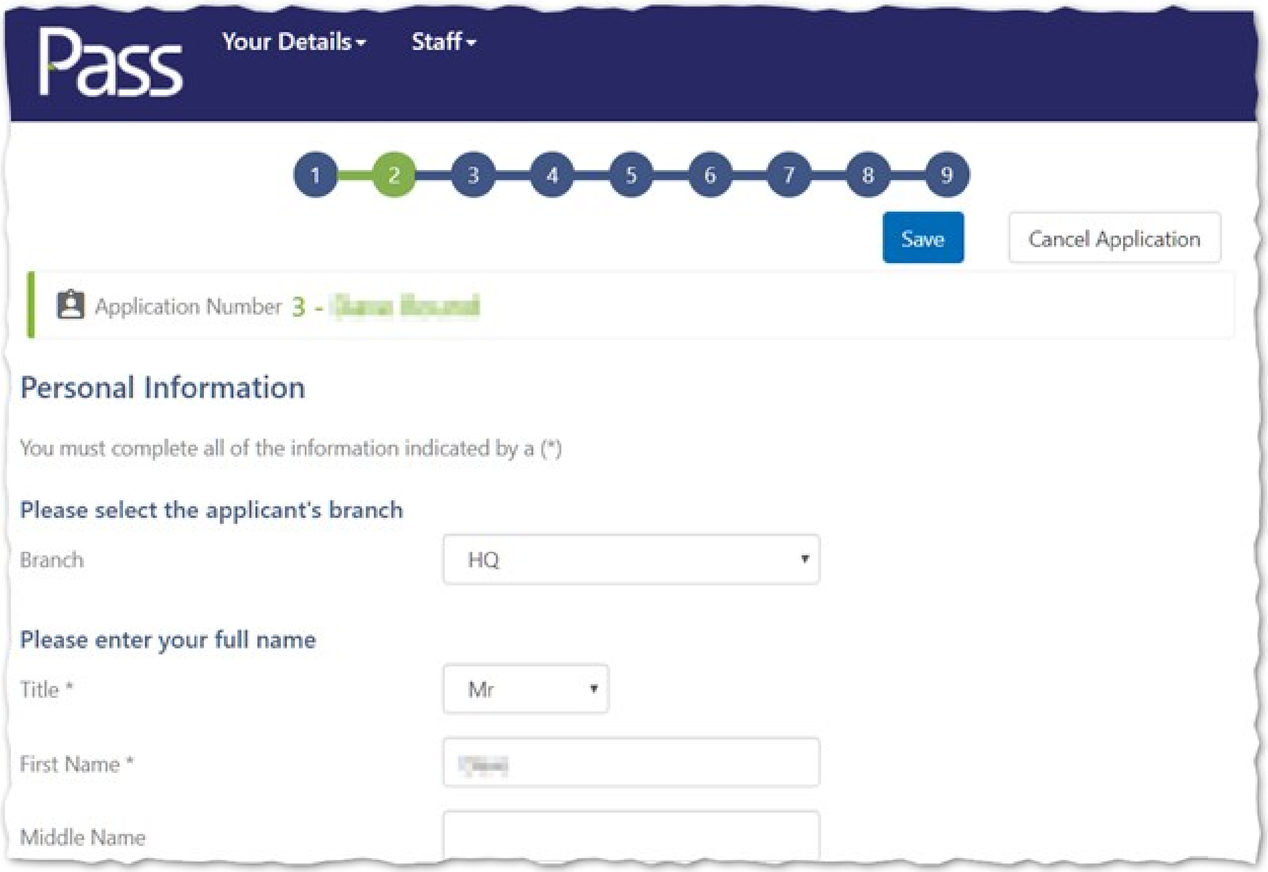
View Notes

When a note is added, the option to **View Notes** is displayed in the menu. This menu option enables you to scroll through the various notes that have been attached to the application as shown below:



Edit

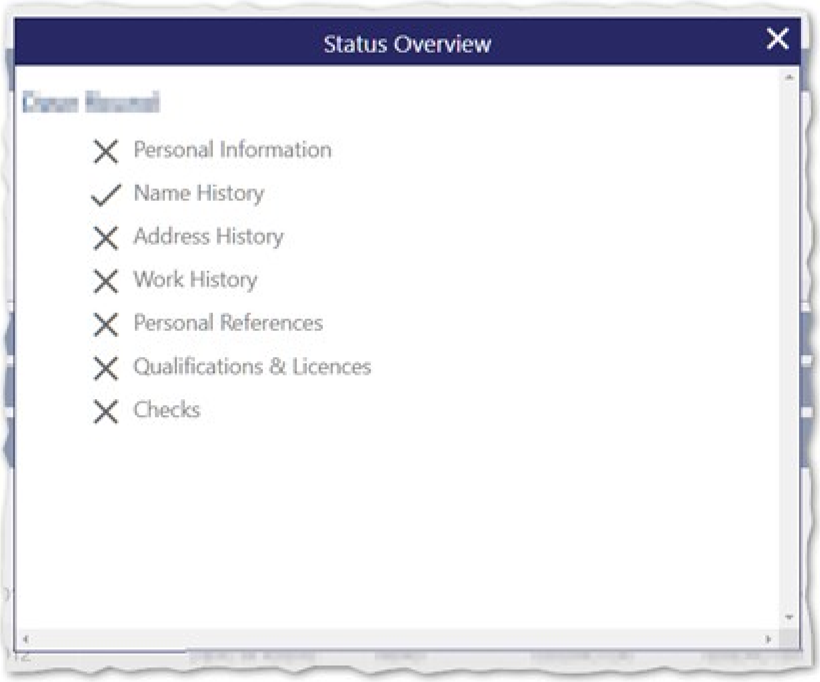
By selecting the **Edit** menu option, you will be able to edit the application. This is shown below:



For more details, see the section of this guide called **Editing an Application**

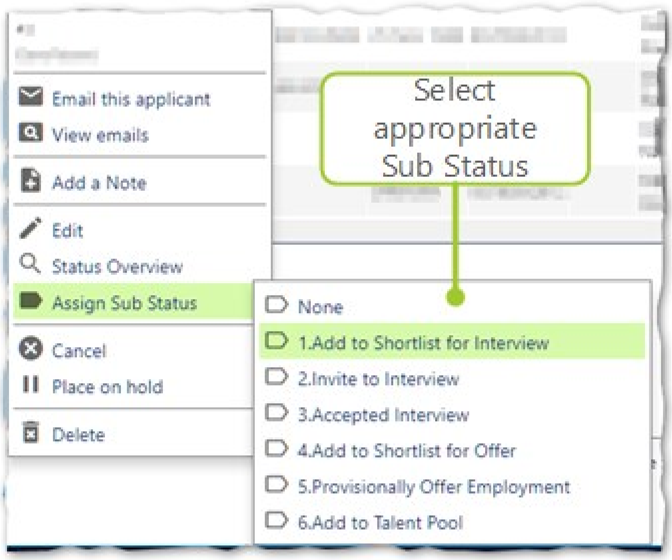
Status Overview

By selecting **Status Overview**, you will be able to see the status screen as shown, whereby a tick shows that part of the application is completed and, a cross denotes that more needs to be done to complete the task:



Assign Sub Status

A Sub Status can be added using the **Assign Sub Status** option. Sub Status could be used, for example, to send out e-mails to applicants and / or hiring managers. From the sub menu that is presented on screen, select the Sub Status of choice. Once selected, it will have been added to the application. The screenshot below shows the sub menu for a given example:



Unsubmit

This option becomes available on the menu when an applicant has submitted thir application form for consideration. . Should an applicant have submitted incorrect information, select **UnSubmit** to provide the opportunity to go back into the application, change the information and resubmit it as new for consideration.

Approve

This option becomes available on the menu when an applicant has assigned a sub status and submitted their application. Select **Approve** to approve the applicant. Once selected, the applicant is approved and sent to Pass for screening.

Un approve

This option becomes available on the menu when an applicant has been approved. Be aware, this option is only available for a very limited amount of time, prior to the approved applicant being sent to Pass for screening.

Cancel

Select this option to **Cancel** an application. Once selected, for audit purposes, you will need to enter a reason for cancelling. Once entered, select **OK** to complete. Alternatively, select **Cancel** to revert back to previous state, without making changes:

Cancelled applications will show as red on the work bench

Re-instate

Select this option to revert an application that has been cancelled.

Place on Hold / Take off Hold

Select this option to toggle between putting the application on hold, or taking it off hold. When the application is placed on hold, this is shown in the **Status** column as **On Hold** rather than **In Progress**. When the application is put on hold, it shows as orange on the workbench

Delete

Select this option to **Delete** the selected application. Once selected, you will need to confirm that you wish to delete the application. Select **OK** to delete, or select **Cancel** to return without deleting the application. Please be aware that deletion of documents in the system is permanent. Once an item has been deleted. There is no back-up or ability to roll back. There is no undelete option as content is removed from the system for GDPR purposes.

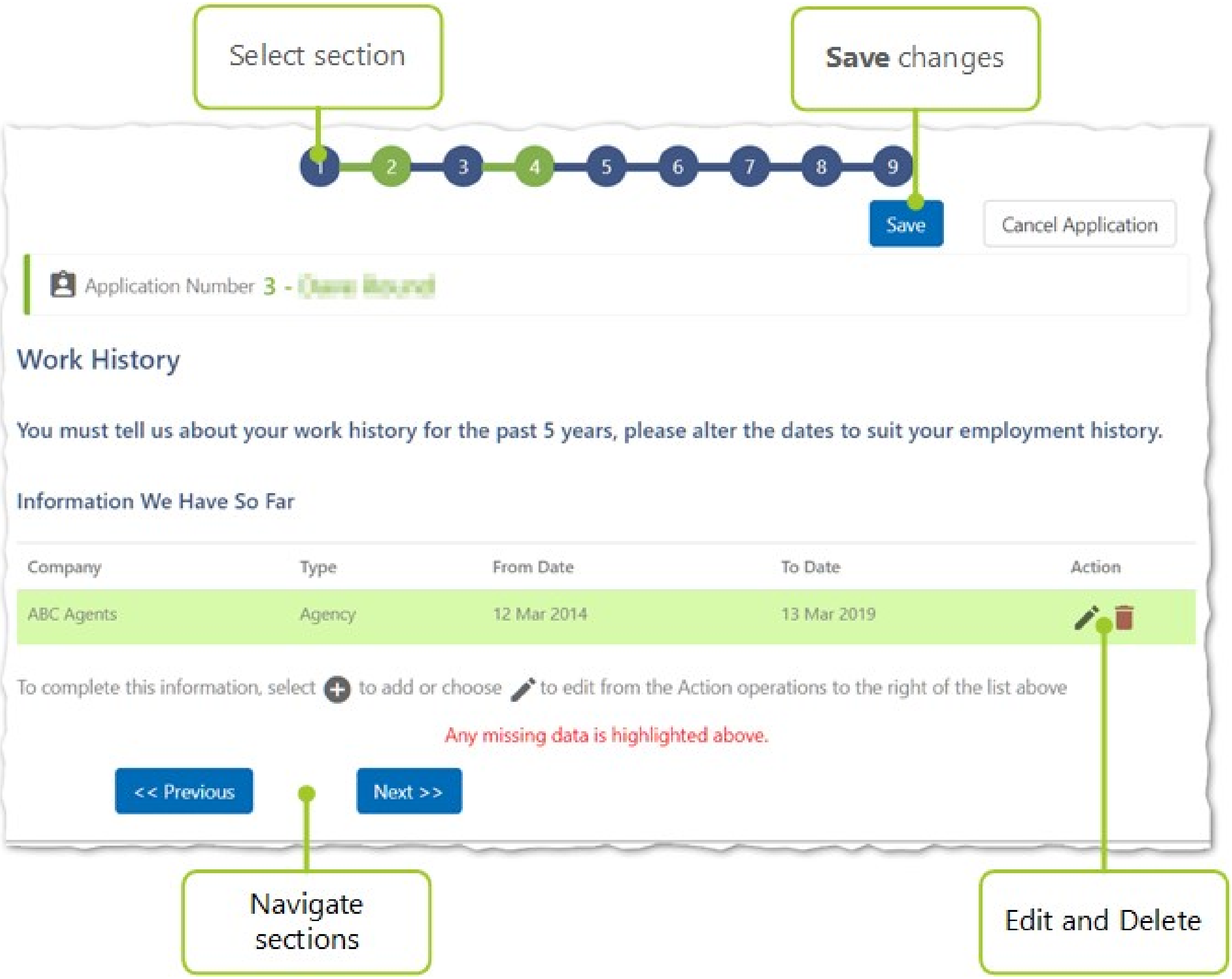
Editing an Application

It is often necessary to edit your applicant provided information. This may involve making modifications or additions, completing office facing references or uploading copies of the documents provided by the applicant. From the Workbench:

- Select **[...]** next to the application you wish to action. Alternatively, you can use your right-hand mouse button to access the applicant
- Select **Edit**
- The application is now opened ready for editing. By default, the application opens on the first screen, however, depending upon how the system is configured, it may go to the review screen (to give the hirining manager rapid access to the high-level details)

Updating information

The application consists of a number of references split into sections. These are configured when the system is set up in Pass. They align to the recruitment process. An example screen is shown below:

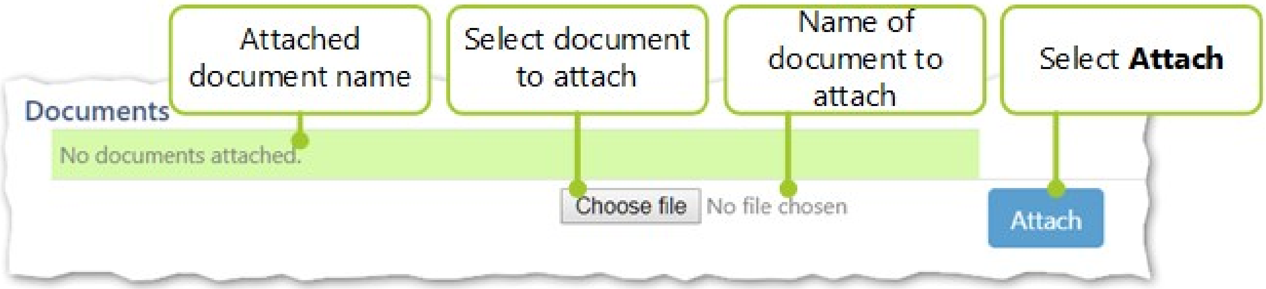


To update information:

- Select the **Numbers** at the top of the page to move from section to section so that you can make your updates. As you scroll over the numbers, you will notice that they have help text attached to them so that you know what is in the content of the screen
- Alternatively, use **<<Previous** and **Next>>** to navigate through each section
- Update the desired section(s) as you navigate the **Numbers**, following the on screen guidance
- For sections with only one reference the reference edit page will open. For sections with more than one reference required, the section summary page will open. From the reference page:
    - Select the **pencil icon** to add the required reference. The reference page will then open
    - Alternatively, select the plus **sign in a circle icon** to add a new reference. Again, the reference page will open
    - Update the fields as required, uploading any documents as you work through the application
    - Any mandatory fields are indicated with an asterisk (*****)
    - Select **OK** once completed
- Select **Save**

Uploading documents

Documents can be uploaded directly from the review page or by accessing the reference pages, if the reference has the documents upload setting enabled. The uploading of documents can be both mandatory and optional, based upon configuration. Additional upload options are available to mobile devices.



To upload a document:

- Select **Choose file**
- From the file selection dialog box, navigate to the document you wish to upload
- Select the file
- Check the text next to **Choose file**. It should indicate the name of the file you have just selected
- Select **Attach**
- On successful attachment, the document name should be displayed, where it says **No documents attached** in the image above

If you are using a mobile device, there will be a variety of upload actions. These may include: Camera, Camcorder, Sound Recorder, Documents, Photos / Gallery, Google Drive, One Drive, Dropbox etc.

Candidate Data Section

Candidate Data

The Candidate Data part of the screen shows the applicants that have been submitted to Pass for screening that meet with the search / filter criteria when **Candidates in Progress** is selected from the **Workbench Filters** part of the screen:. This part of the screen can also be accessed via the **Advanced Search** part of the screen when the **Type** selected is **Candidate**. An example of **Candidate Data** is shown below:

Details of the Candidate's application can be viewed by selecting the light blue icon next to each row or by selecting the right-hand mouse button on the candidate record. Each candidate record can be viewed in two ways - their original application and their present application. Their records can be assigned a sub status. Additionally, the data can be exported for use outside of Pass/PDC in a spreadsheet format. Basic information for each applicant is shown in each column. This comprises: Branch, Number Name, NI Number, Date of Birth, Position, Vacancy Ref., Site, Status and Progress.

Status colours are coded as follows:

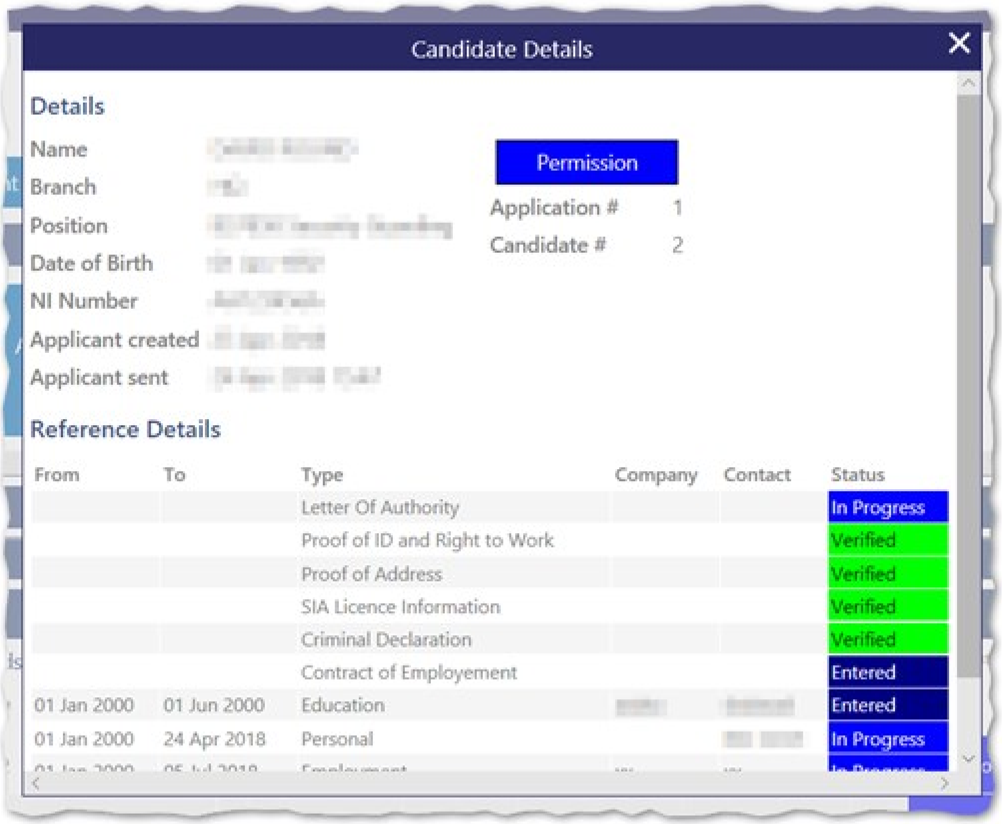
- Dark blue - The reference has not yet been started
- Light blue - The reference is in progress, on hold or provisional/verbal confirmation has been received
- Green - The reference has been accepted by a user
- Yellow - The reference has been conditionally accepted by a user
- Orange - The reference requires action by the user
- Pink - The reference has not yet been accepted
- Red - The user has failed the reference

View Original Application - Candidate

This screen shows where you are in the screening process, without the need to telephone the recruiters. Select **View Original Application** (using either the right-hand menu or from the **[...]** menu). Once selected, the candidates original application details are displayed in a form format. This is shown below:

View Application (Screening Status) - Candidate

Select **View** (using either the right-hand menu or from the [...] menu). Once selected, the candidates current application details are displayed in a window with a status alongside the various different pieces of information requested. This clearly highlights where candidates are in the screening process (without the need to telephone recruitment) as shown:



Status colours are coded as follows:

- Dark blue - The reference has not yet been started
- Light blue - The reference is in progress, on hold or provisional/verbal confirmation has been received
- Green - The reference has been accepted by a user
- Yellow - The reference has been conditionally accepted by a user
- Orange - The reference requires action by the user
- Pink - The reference has not yet been accepted
- Red - The user has failed the reference

Export Candidate Data to Spreadsheet

Select **Export data to spreadsheet** to generate a CSV file comprising all candidate information that is shown in the Candidate Data list. The CSV file will be created and downloaded by web browser. This can then be opened using a spreadsheet. An example of an exported CSV file is shown below:

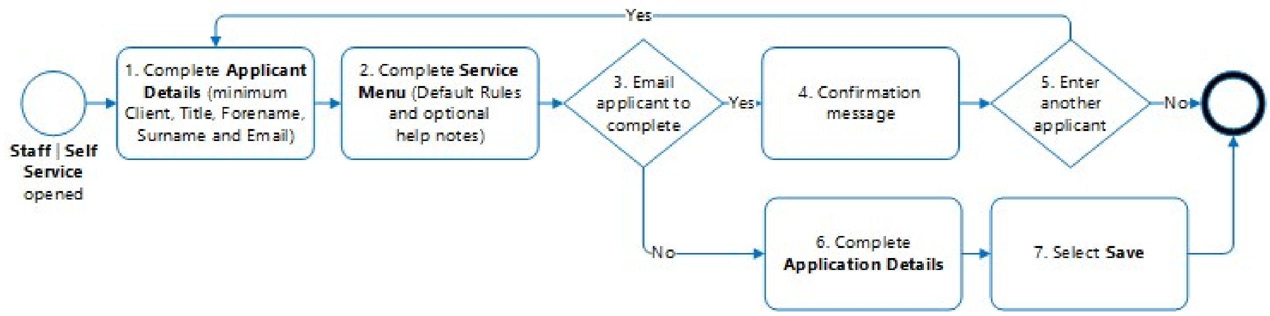
SELF-SERVICE

To access this part of the system, select **Self Service** from the **Staff** menu

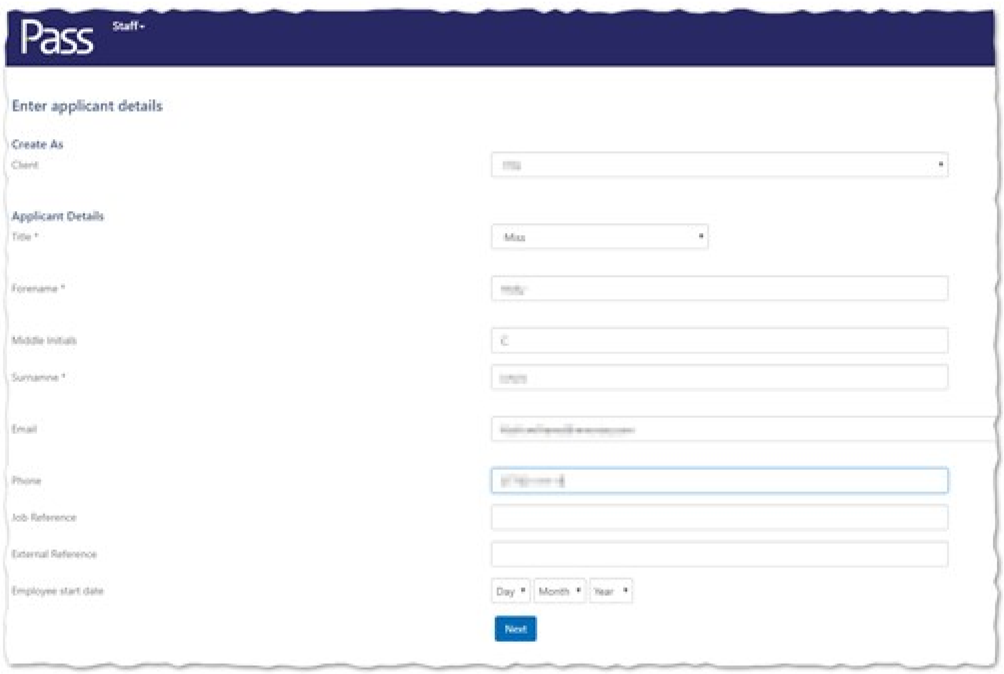
The self-service part of PDC enables you to create a talent pool of applications for individuals based on a series of default rules. You could use this on a tablet for example at recruitment events, to take basic information ready for completion at a later date. Alternatively, you could use it to send out application forms electronically when they are requested by e-mail or over the telephone for example. In terms of functionality, you can:

- Enter in basic applicant details including a name and e-mail address, to send the individual an e-mail requesting that they complete their details online
- Enter in applicant details on an adhoc basis

The following outlines the Self Service process from end-to-end:



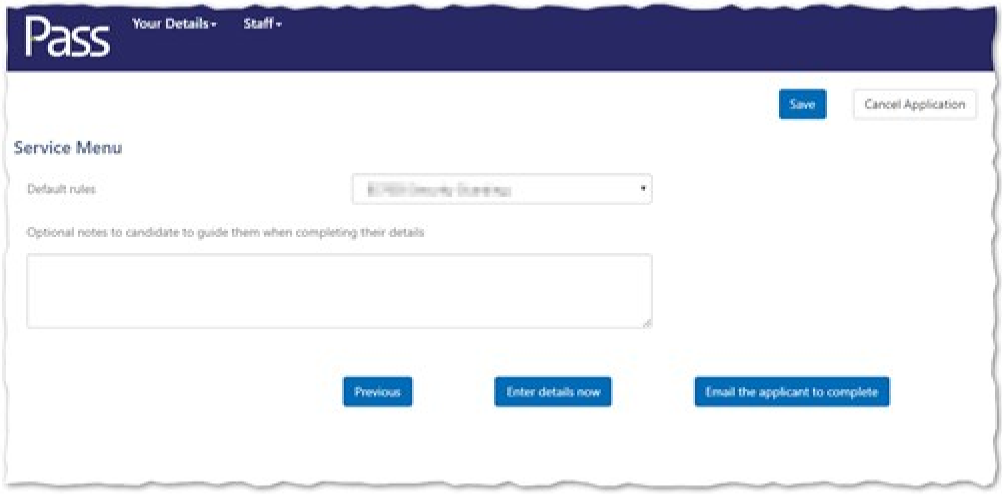
Step 1 - Complete Applicant Details



After opening the **Self Service** page from the **Staff** menu, you will be prompted to enter **Applicant Details** as shown above. This screen, like all of those in PDC is configurable in PASS and using the PDC Admin Tool. As a result, what a user may see and need to enter may differ from the example shown. As a minimum, you will generally need to enter a **Client / Customer / Branch, Title, Forename, Surname** and **Email address** for the applicant.

Without entering an Email address, you will not be able to send an email to the applicant to complete the application (Step 3). Once completed, select **Next**.

Step 2 - Complete Service Menu



The next step involves completing the **Service Menu**. Select the **Default Rules** for the application. The **Default Rules** are set up in Pass. These screening type rules dictate the journey an applicant will take in terms of the information that they will need to supply along with when, to support their application. Once the Default Rule has been selected, you can enter some optional guidance notes to help the applicant as they start to complete the online application form.

Step 3 - Email Applicant?

Having completed Step 2, you have two choices. One is to **Email the applicant to complete**. The other is to **Enter details now**. If you choose to send the email, move onto Step 4. If you wish to enter details for the applicant, move onto Step 6

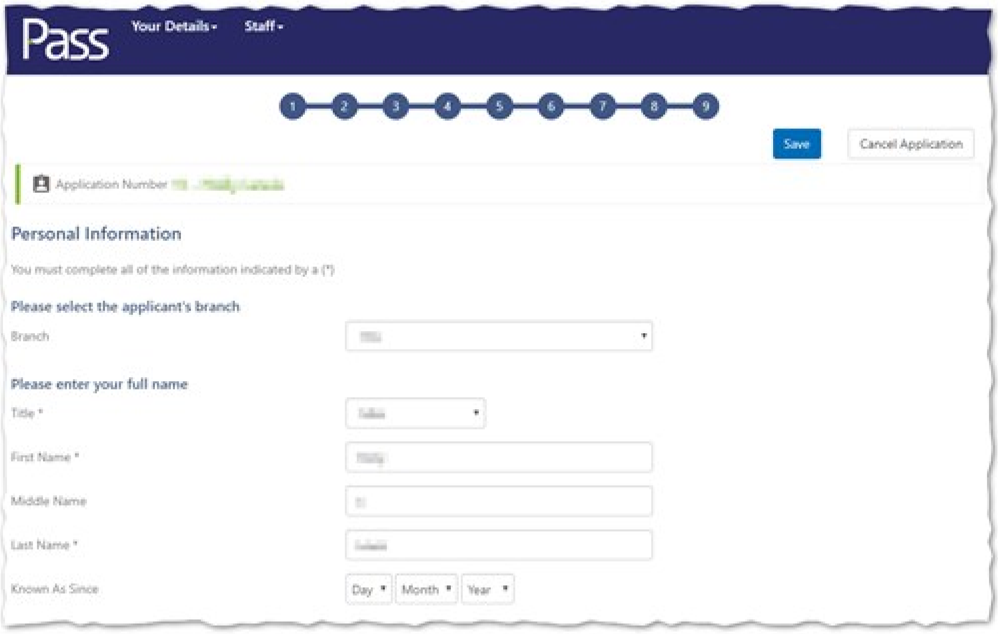
Step 4 - Confirmation Message

If you have selected **Email the applicant to complete**, the next screen you are presented with confirms the email has been sent.

Step 5 - Enter another applicant?

Once you have read the Confirmation Message, you have the choice to either select **Enter Another Applicant** or move onto another task. If you select **Enter Another Applicant** you are returned to Step 1.

Step 6 - Application Details



If at Step 3 you decide to **Enter details now**, you are sent to a screen similar to the one shown above. Complete the details, stepping through the sections you wish to update.

Please Note: The details that you (or the applicant) will need to complete will be dictated by the screening type rules that your organisation will have defined in Pass, along with the settings that have been applied to the various attributes in the PDC Admin Tool.

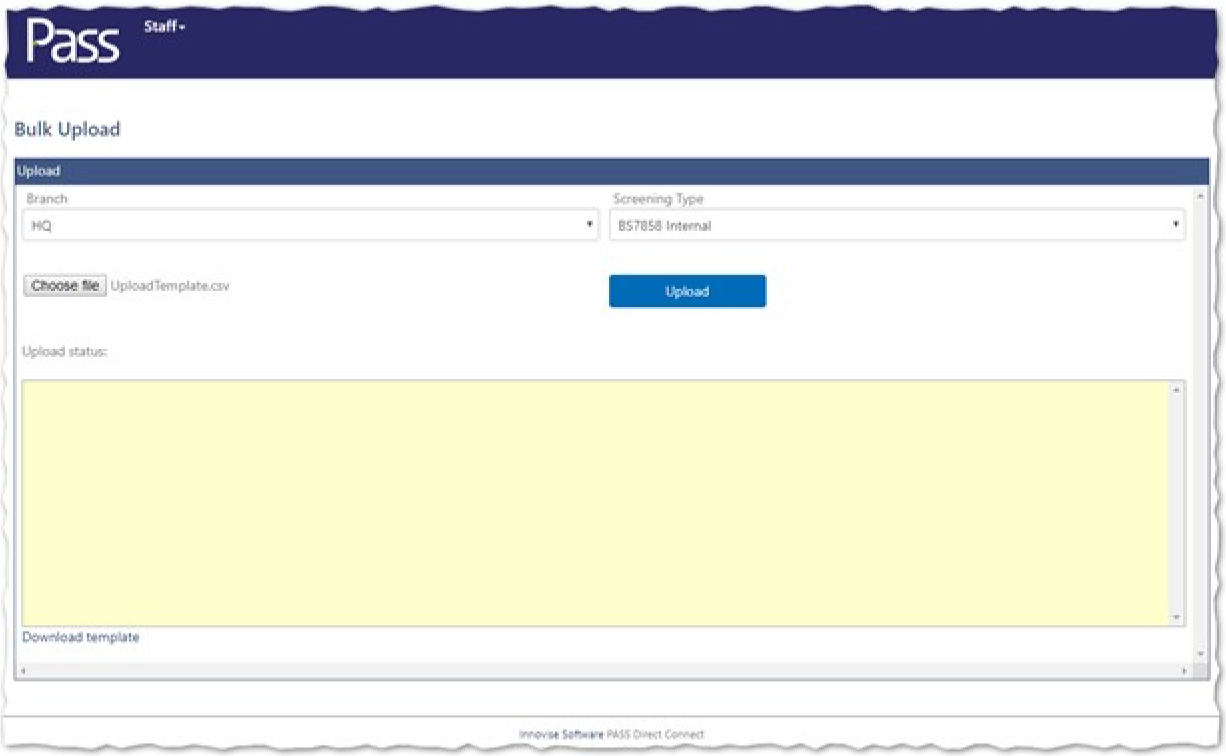
Step 7 - Save

Once you have made your updates, select **Save**.

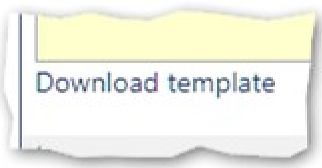
SELF-SERVICE BULK UPLOAD

To access this part of the system, select **Self Service - Bulk Upload** from the Staff menu

The **Self Service - Bulk Upload** screen is particularly useful for example when doing TUPE take ons or when you are attending a job show and you have captured details of people who are showing an interest in making an application for roles. It enables you to upload lots of application records using a CSV format template that is easily downloadable from the page. The page looks as follows:



Downloading the template



To download the template, simply select **Download template** and follow the instructions on your browser

Editing the template

	A	B	C	
1	applicantName.Title	applicantName.Last	applicantName.Fore	applic
2	Mr	Smith	Andy	
3	Mrs	Green	Elle	
4	Miss	Spencer	Laura	
5	Mr	Lewis	James	
6	Mr	Hunter	Will	
7				

Follow these instructions to edit your template:

- Using a text editor or spreadsheet application, open **UploadTemplate.csv**
- Add the applicant records as per your needs. Ensure you take into account the **CSV File Format** guidance detailed in the section of this guide below
- Save as a CSV file ready to upload as explained below

> **Please Note:** If you are using certain spreadsheet applications to edit your CSV file, you need to be aware of how it handles dates. When updating the **applicant.DateOfBirth** field, by default it will change it to be in the format DD/MM/YY. The date needs to be expressed in the DD-MMM-YYYY format

CSV File Format

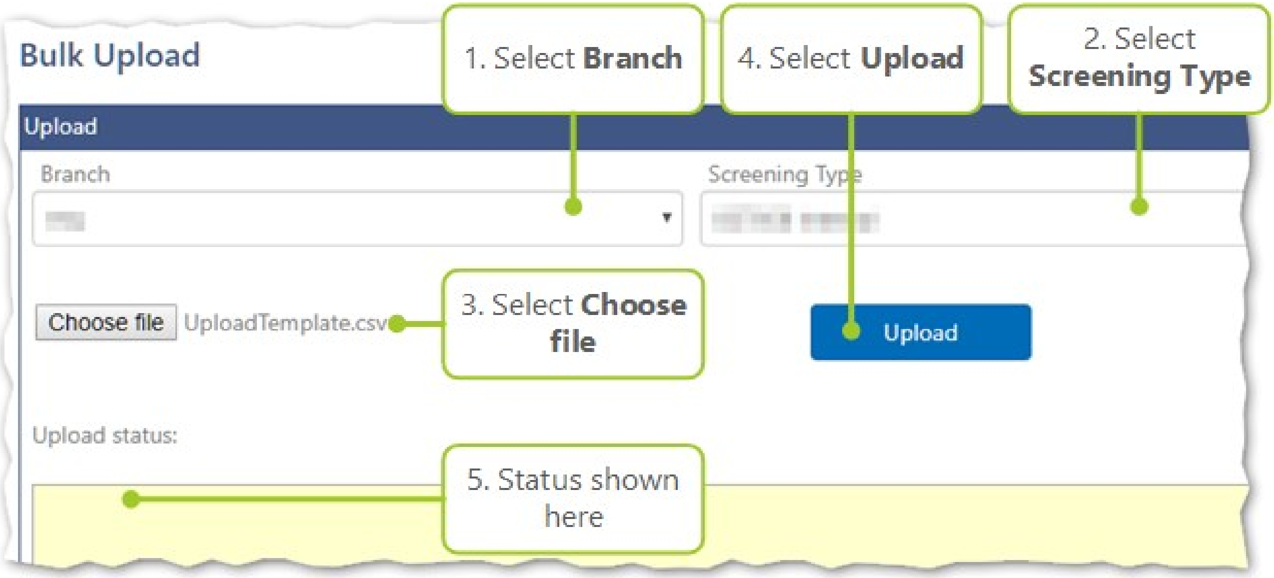
The CSV file template is fixed in field order and the first line is treated as a header and ignored:

- **Mandatory** fields must be present and contain values. If you have no value to include in a field that is mandatory, you could enter a - if you don't have values. In the case of fields that are validated such as email addresses, you could enter a@a.com for example.
- **Non-Mandatory** fields must be present but need not contain a value
- The **Constraint** column indicates the validation applied to the field in the CSV file
    - Maximum field lengths must be respected
    - The **county** must be one of the recognised list of counties from within PDC / PASS. If they do not exist in there, they will cause import errors
    - The **country** must be one of the recognised list of countries. If they do not exist in there, they will cause import errors
    - **Postcode, email** and **National Insurance number** must be in the correct format
- Fields must be separated from each other with a commas

Field	Mandatory	Constraint
applicantName.Title	Yes	Max 50 characters
applicantName.Last	Yes	Max 50 characters
applicantName.Fore	Yes	Max 50 characters
applicant.DateOfBirth	Yes	Valid and makes age between 14 to 100 years in the format DD-MMM-YYYY
applicant.AgencyApplicationNumber	Yes	Max 50 characters. If you do not use Agency Application Numbers, simply set as 0 (Zero) for every record
applicantAddress.House	No	Max 30 characters
applicantAddress.Address1	Yes	Max 50 characters
applicantAddress.Address2	No	Max 50 characters
applicantAddress.City	No	Max 50 characters
applicantAddress.County	Yes	Max 50 characters. Has to be valid (based on those in PDC /

		Timegate)
applicantAddress.Country	Yes	Max 50 characters. Has to be valid (based on those in PDC / Timegate)
applicantAddress.PostCode	Yes	Max 50 characters. Must be a valid UK postcode
applicant.EmailAddress	Yes	Max 50 characters. Has to be valid email format
applicant.PositionCode	Yes	Max 10 characters. Has to be valid (based on Rank field in PDC / Timegate)
applicant.NationalInsurance	Yes	Max 50 characters, Must be a valid UK National Insurance number
applicant.ExternalReference	Yes	Max 50 characters

Upload your CSV file



To upload your CSV file into PDC from the **Bulk Upload** window:

- Select your **Branch** to upload into
- Select the **Screening Type** you wish for your applicants to be screened under
- **Choose file** that you wish to upload. Once selected, you will be able to use your device to find the file that you wish to upload. Once selected, the file name will be shown alongside **Choose file**
- Select **Upload**. At this point, the CSV file is read and the individual records validated
- If successful this will be shown in the **Upload Status** window
- If there are any errors then none of the records will be imported. Error messages will be shown in the **Upload Status** window

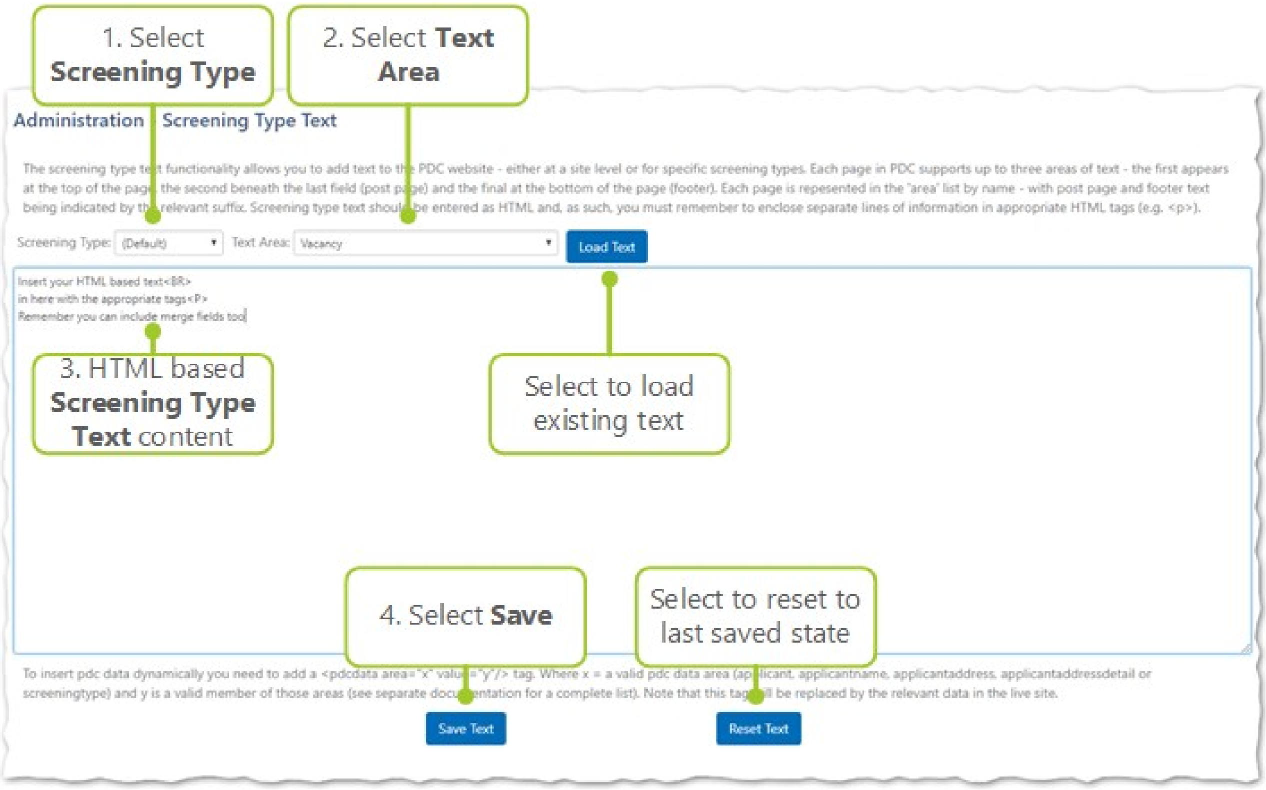
Please Note: If you upload a file of for example, 1000 applicants and 5 fail to import, you will only need to modify the 5 to correct the errors. The other 995 entries can be discarded. If you retain those 995 entries, they will be duplicated. We recommend that you test your upload file first with a small subset of entries as it can be difficult to see where import errors have occured. The system will only tell you about the line where the first error occurs. You will not be provided with details about any further errors. It is also important to realise that if you navigate away from the screen showing the error details, you will not be able to check through the log for errors - it disappears off the screen and cannot be reloaded. If you found yourself in this scenario, you would be checking every record that you have tried to import against those records that have actually been saved in the database. This would be very time-consuming and frustrating.

ADMIN - S/TYPE TEXT

To access this part of the system, select **Admin - S/Type Text** from the **Staff** menu.

From this page, you can customise screening text to the PDC website, either at a site level or for specific screening types. If you do not customise the content, the default content will be applied to all screening types. Within each PDC page, text can be added in up to three areas:

- At the top of the page
- After the last field on the page (post page)
- At the bottom of the page (footer)



To add screening type text to your PDC website:

- Select **Screening Type** from the choices available
- Select **Text Area** where you wish to add text. When doing this please note that the area:
    - At the top of the page is referred to as the **Page Name** e.g. Vacancy
    - After the last field that is completed on the page is suffixed **PostPage** e.g. Vacancy_PostPage
    - At the bottom of the page is suffixed **Footer** e.g. Vacancy_Footer
- Within the **Screening Type Text** box under the **Screening Type** and **Text Area**, enter the text you wish to display. You can enter plain text in here, however, the **Screening Type Text** box is designed for the entry of HTML. Therefore, to ensure your messages look effective, professional and well formatted, it is essential to use tags like
 to force a line break, or <P> to create paragraph breaks when entering text. You can also include mail merge fields, to customise the content for your users. To find out more about the various

mail merge fields available, please see "Admin - Email Template" on page 41.

- Select **Save Text**

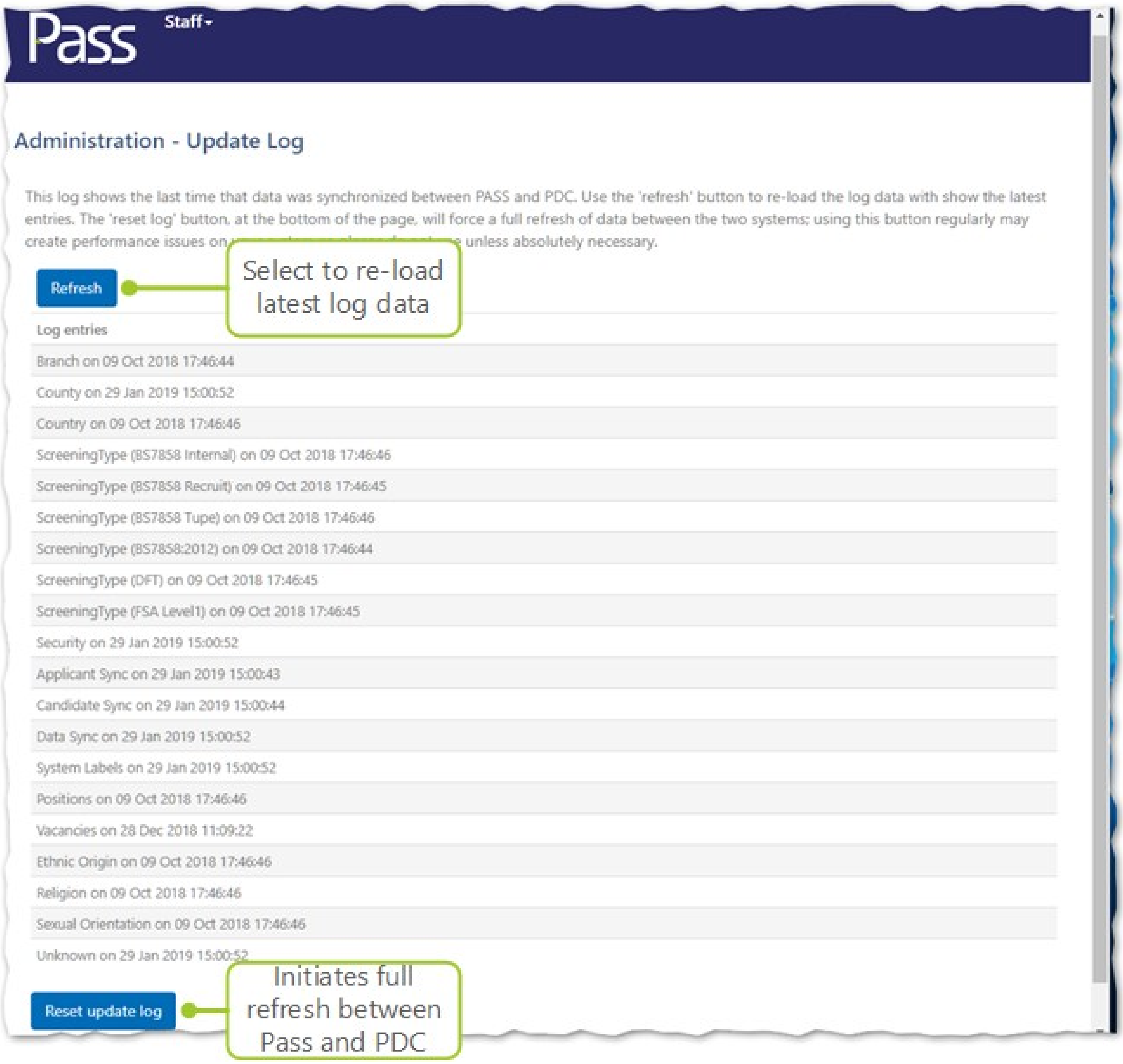
To reset the value in the text box to the original value, select **Reset Text**

To load up any text, that has been previously entered into the **Screening Type Text** area, for a given **Text Area**, select **Load Text**

Tip: If you are unfamiliar with HTML, take a look at the website WordHTML (www.wordhtml.com). You can create and format your text using a simple word-processor in one tab. This is then converted into HTML in an adjoining tab that you can copy and paste into PDC.

ADMIN - UPDATE LOG

To access this part of the system, select **Admin - Update Log** from the **Staff** menu



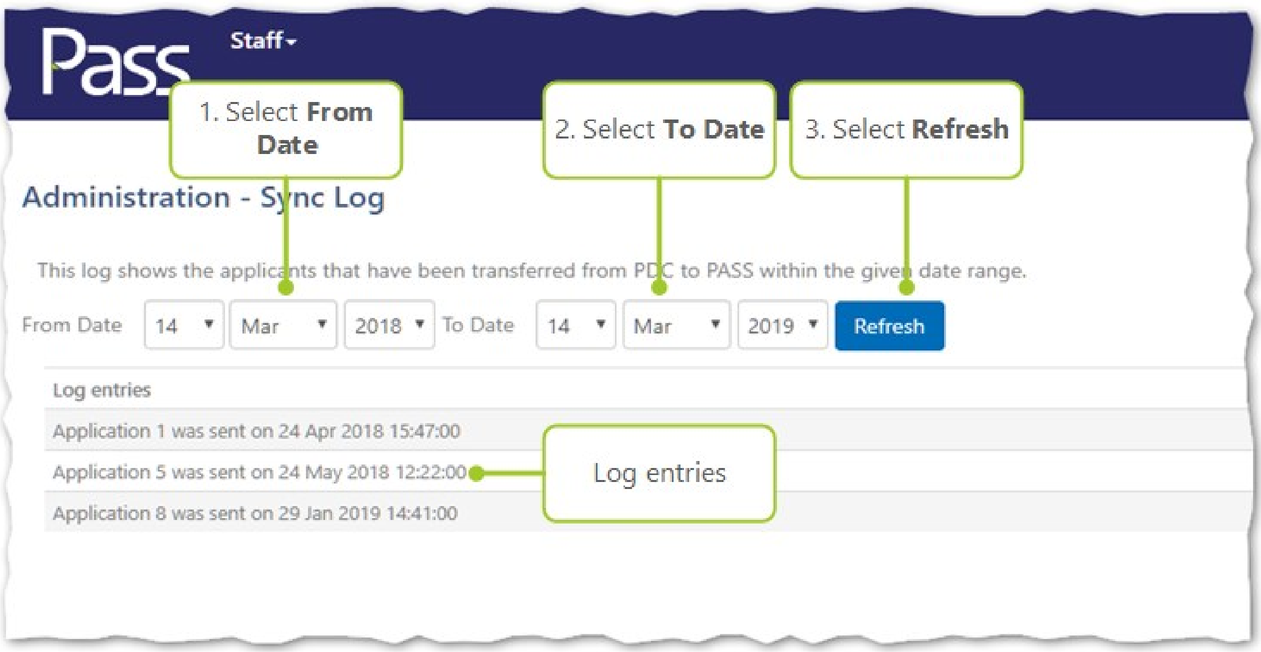
This screen, the **Admin - Update Log** records the last time information was synchronised between Pass and PDC. Most things are updated back to PDC only when they have changed in Pass. The screen is used when there are performance issues. It is used to see when items have been synchoronised.

Select **Refresh** to see the latest Log entries

Select **Reset update log** to force a full refresh of data from Pass to PDC including things such as screening types and branches for example. Please be aware that regular selection of this option may create performance issues.

ADMIN - SYNC LOG

To access this part of the system, select **Admin - Sync Log** from the **Staff** menu



The Sync Log shows when applicants were synchronised from PDC to Pass to be created as new applicants, who will subsequently be converted to candidates when they are ready to be screened.

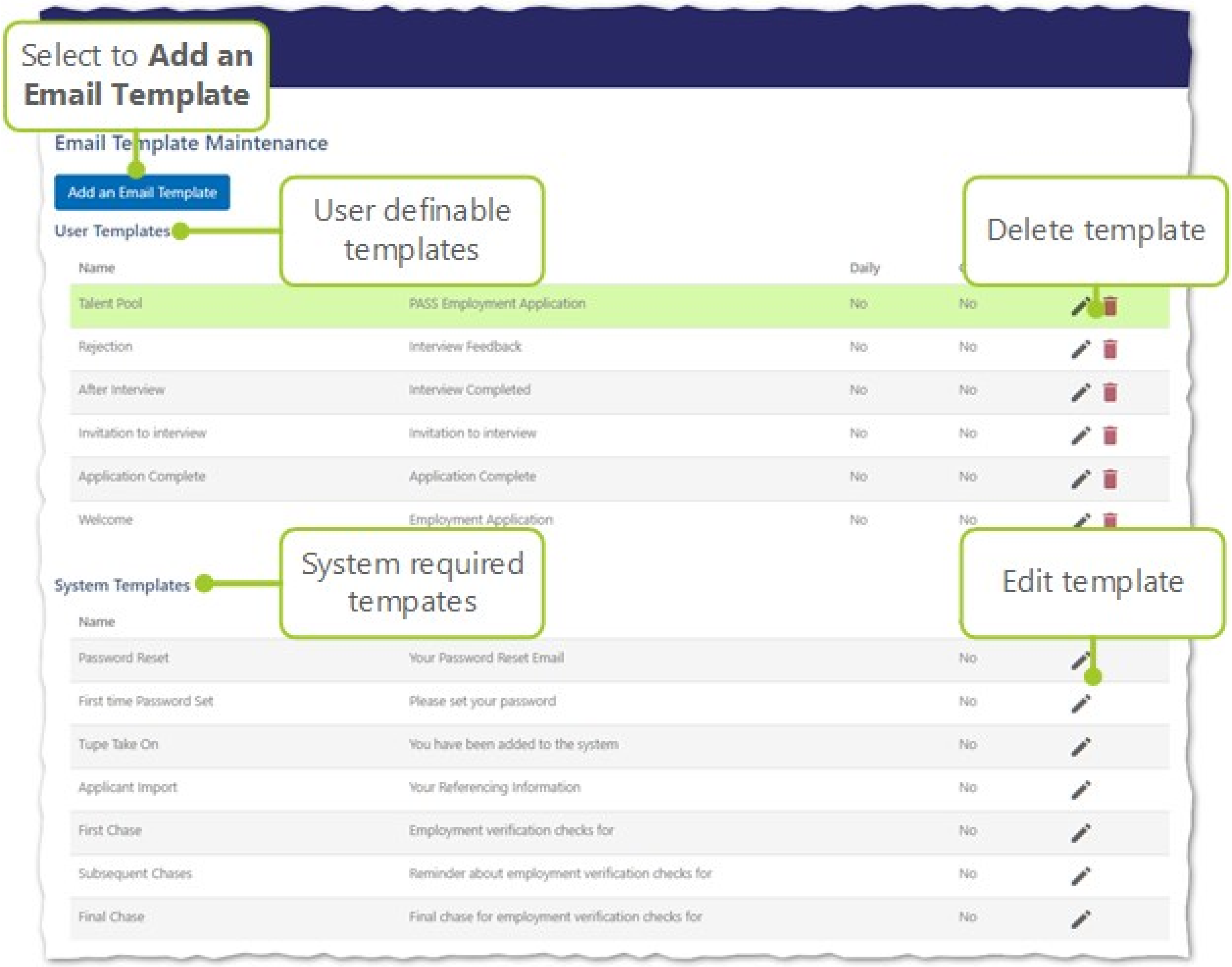
To view the log entries:

- Select **From Date** from the three date selectors
- Select the **To Date** from their respective three date selectors
- Select **Refresh**

You can update the results to monitor synchronisation by selecting **Refresh**.

ADMIN - EMAIL TEMPLATE

To access this part of the system, select **Admin - Email Template** from the **Staff** menu



Emails can be automatically generated through PDC for a variety of functions ranging from resetting passwords, through inviting applicants for interview to welcome letters.

Email templates provide consistency in terms of structure, format and content for emails created. They can include mail merge fields (detailed later in this section) to customise the messages that are sent to applicants.

From this screen, email templates are created along with their associated actions.

Within PDC there are two types of Email template that are shown in their own sections:

- **User Templates** - those set up by yourself or an administrator, customised specifically for your organisation
- **System Templates** - those already set up as an integral part of PDC that are required for PDC to work correctly. These can be edited and configured to meet with your exacting organisation needs

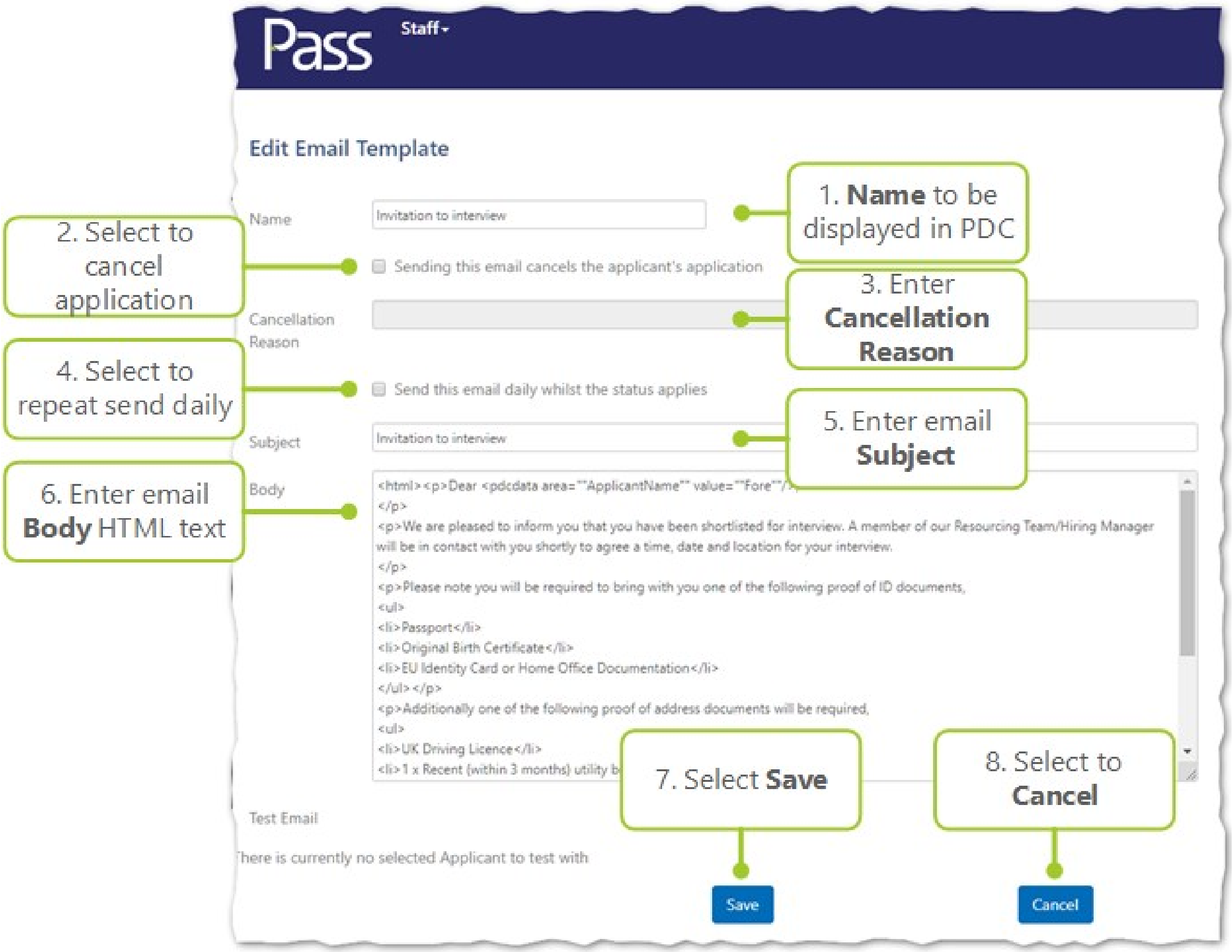
From the initial screen, you have three actions that are described in the sections over the next few pages:

- **Add an email template** (user template)
- View / edit an existing email template (user template or system template)
- Delete an existing user email template

Add a new email template

To add a new email template:

- Select **Add an Email Template**. This will open a blank copy of the **Edit Email Template**
- Complete the template by following Steps 1 through 6 below:



- **Step 1** - Enter the Name for the template to be displayed in PDC (for example in drop-down lists)
- **Step 2** - Select Sending this email cancels the applicant's application If you wish for the applicant's application to be cancelled following the sending of the email based on this template. This is particularly useful, for example, where the applicant / candidate has failed their interview process, and no further actions will be made
- **Step 3** - This option is by default not editable. If, however, you select Sending this email cancels the applicant's application, you are given the opportunity to enter a Cancellation Reason within this text box. This is recorded on the applicants record. Additionally, the text is displayed following cancellation in the Workbench, when the cancelled status is rolled over for the cancelled application.

  An example of this is shown:

- **Step 4** - Select to Send this email daily whilst the status applies - i.e. until the status changes, the email will be reissued daily
- **Step 5** - Enter a Subject for the email
- **Step 6** - Enter the main Body of the email (see next section to find out more about the content you can enter in this field). You can enter plain text in here or use HTML text. You can also include mail merge fields, to customise the content for your users. To find out more about the various mail merge fields available, please see “Available merge fields and their usage”.
- **Step 7** - Select **Save**. To exit without saving changes, select **Cancel**

Please Note: If required an override template can also be added at the screening type reference level. The system will firstly look for a screening type reference email template and use it, if found. If it is not found, the system will look for a branch level email template and use that if it has been defined. Once a branch level email template is defined then any emails created during reference chasing for an applicant that belongs to the branch, will have the template applied

Main body content

The main body content of an email can range from simple e.g.

> We are pleased to inform you that you have been shortlisted for interview. A member of our Resourcing Team will be in contact with you shortly to agree interview time, date, location and proof of ID documents. We wish you the best of luck with your application.

To a more complex structure and context e.g.

Dear Kate,

We are pleased to inform you that you have been shortlisted for interview. A member of our Resourcing Team will be in contact with you shortly to agree interview:

- Time
- Date
- Location
- Proof of ID Documents

We wish you the best of luck with your application.

Kind regards,
Resourcing Team

In the first example, the body will literally just contain the text as shown above.

In the second example, there is formatting and a series of values that are being extracted from the application.

Simple HTML is used to format the text within the email template i.e. to make the text bold, to put spaces between the lines and to create the bullet point list.

Customised data is created using a number of place holders called Merge Field Codes.

When the system processes the template, it reads the codes, translates their meaning and substitutes them with values from the application accordingly.

In this example, the forename “Kate” is created using a Merge Field

The exact context of what will be displayed using the merge fields will clearly depend on the data held on the associated fields so based on this, the email template can be created tailoring the use of merge fields to meet requirements.

The text below shows the text, the HTML and merge fields. HTML is highlighted in blue, whilst the merge fields are shown in green:

```
<HTML><P>Dear <PDCDATA AREA=""ApplicantName"" VALUE=""Fore""/>,
</P>
<P>We are pleased to inform you that you have been shortlisted for interview. A member of our
Resourcing Team will be in contact with you shortly to agree interview:
<UL>
<LI>Time</LI>
<LI>Date</LI>
<LI>Location</LI>
<LI>Proof of ID Documents</LI>
</UL></P>
We wish you the best of luck with your application.
<P>Kind regards,<BR>
<B>Resourcing Team</B>
</P>
</HTML>
```

Available merge fields and their usage

The following merge fields are available for use in screening type text and email templates. To use them, simply use this format in your HTML:

```
<PDCDATA AREA=”area” VALUE=”value”/>
```

where area is from the first column below and value is from the second column e.g.

```
<PDCDATA AREA=”Applicantaddressdetail” VALUE=”Address1”/>
```

Area	Note	Value
Applicant or **Candidate**	Use **Applicant** for areas shared between **Applicants** and **Candidates**	**AgencyApplicationNumber**
		AgreedToApply
		ApplicationNumber
		Approved
		BranchCode
		CancellationReason
		CancellationUser
		Cancelled
		CancelledDate
		CreatedDate

		CreatedUser **CreatedUserId** **ExamScore** **ExternalReferencesComplete** **ImportSourceCode** **Instructions** **JobTitle** **OnHold** **PositionCode** **ScreeningTypeCode** **VacancyReferenceNumber**
ApplicantNameor **CandidateName**	Use **Applicantname** for areas shared between **Applicants** and **Candidates**	**From** **To** **IsCurrent** **Fore** **Last** **Middle** **Title** **ToShortString**
Applicantaddress or Candidateaddress	Use **Applicantaddress** for areas shared between **Applicants** and **Candidates**	**From** **To** **IsCurrent**
Applicantaddressdetail		**House** **Abode** **Address1** **Address2** **City** **County** **PostCode** **Country** **AddressString**
Screeningtype		**GapDays** **PersonalReferences**

	PersonalWeeks
	ScreeningWeeks
	ScreeningTypeCode
	Description
	NameHistoryWeek
	AddressHistoryWeeks
	ExamCode
	ExternalSystemID
Branch	Code
	Description
	Label_NIN
	Label_PostCode
	Label
	County
	Label_Branch
	Label_Customer
	Label_Employee
	Contact
Reference	Description
	Question
	SystemCode
Vacancy	Reference
	Title Description
	StartDate
	CloseDate
	ScreeningTypeCode
	BranchCode
	SiteCode
	City
	InternalScreeningTypeCode
	JobDuration
	JobStartDate

	JobSalary
	WorkingHours
	AdditionalText
Resource	General.WebsiteURL
Fasttrack	Number
System	GDPRLink
	SensitiveInfoConsent DataProtectionMessage RetentionConsentMessage_ Applicant DataProtectionLink

View / edit an existing template

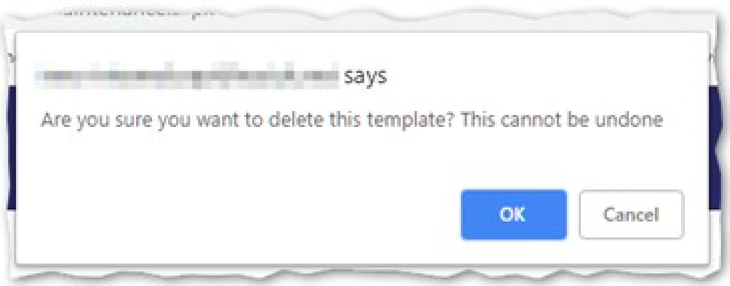
To view or edit an existing template follow these steps:

- Select the **pencil icon** to edit or view an existing template (either a **User Template** or **System Template**)
- Edit the template using the guidance in the previous section as required
- Select **Save** to save the changes
- Select **Cancel** to revert to the last saved state or if you have not made any changes (i.e. just viewed the template)

Delete an existing user template

To delete an existing **User Template**:

- Select the **trash can (delete icon)**next to the **User Template** of your choice. The following message will be displayed:

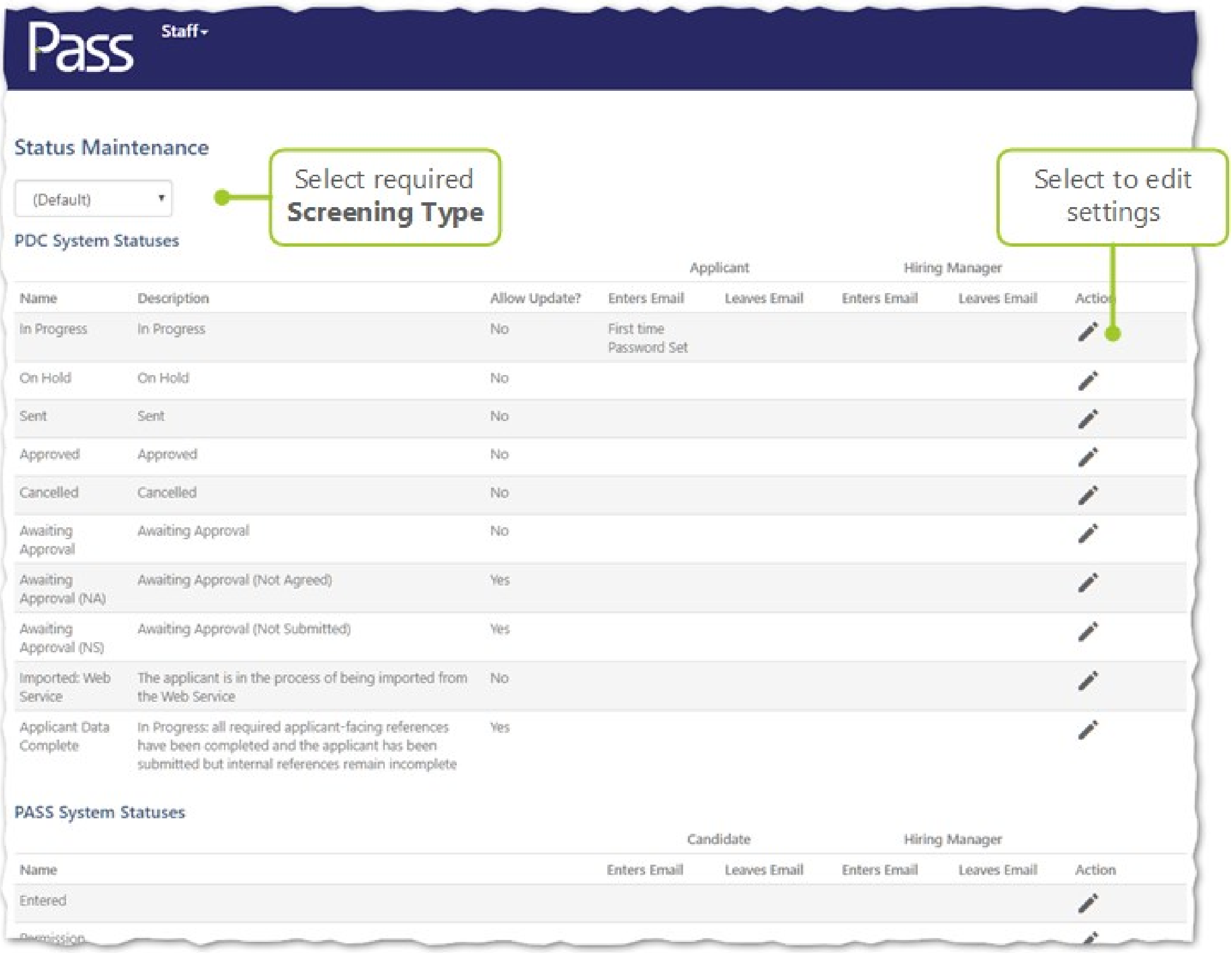


- Select **OK** to confirm the deletion, or **Cancel** to return to the **Email Template** screen

ADMIN - STATUS MANAGEMENT

Summary screen

To access this part of the system, select **Admin - Status Management** from the **Staff** menu



The Status Management screen comprises **PDC System Statuses, PASS System Statuses** and **Sub-Statuses**. From this screen you are able to manage which communications are undertaken at various parts of the recruitment process and to whom emails based on templates are sent.

The default settings are used as standard.

You can select

- Which email template is used to send an email when an application “enters” a system status (**Applicant Enters Email**) e.g. someone who has had a successful interview and is being congratulated
- Which email template is used to send an email when an application “leaves” a system status (**Applicant Leaves Email**) e.g. status changes changes to something else e.g. someone has been put on hold and are being taken off it
- Which email template is used to send an email to the Hiring Manager (who is assigned to the Applicant) when an applicant “enters” a system status (**Hiring Manager Enters Email**)

- Which email template is used to send an email to the Hiring Manager (who is assigned to the Applicant) when an applicant “leaves” a system status (**Hiring Manager Leaves Email**)

PDC System Statuses and **PASS System Statuses** can be configured to the individual screening type in terms of what emails are sent and to whom they are sent. The System Statuses could be different for every screening type that you configure, to meet with your business needs.The **PDC System Statuses** and **PASS System Statuses** are a standard part of the PDC / Pass. They are “hard-coded” into the system. They cannot be deleted or added. They can, however, be switched off. To switch between different **PDC System Statuses** and **PASS System Statuses** for your screening types, select the screening type from the drop-down list.

Meanwhile, **Sub-Statuses** are independent of any PDC and Pass screening types. They are defined by the business. They enable you to add an extra level of detail to where the applicant is in the recruitment process. The amount of **Sub-Statuses** are determined by you and your organisation. In addition to editing these, you can add or delete these to meet with your business needs. **Sub-Statuses** are generally flags / tags. They are used largely for categorisation and not for their functionality (with one or two exceptions).

The Status column under PDC System Statuses detail the different stages the Applicant will progress through. The different stages are:

- **Imported Web Service** - The Applicant has been imported by the PDC web service from a Candidate Attraction Stystem or another HR System that is in use within your organisation
- **In Progress** - The applicant is currently completing the application
- **Applicant Data Complete** - In Progress: all required applicant-facing references have been completed and the applicant has been submitted but internal references remain incomplete
- **Awaiting Approval** - The particular stage has been completed but needs to be approved by an authorised user
- **Awaiting Approval (NA)** - The particular stage has been completed but its outcome is not presently agreed i.e. it’s not yet approved
- **Awaiting Approval (NS)** - The particular stage has been completed but it has not been submitted e.g. it’s complete, but the user hasn’t pressed submit
- **On Hold** - At this point in the stage, the application has been put on hold
- **Cancelled** - The application has been cancelled
- **Approved** - The application has been approved
- **Sent** - The applicant has been sent to Pass for screening

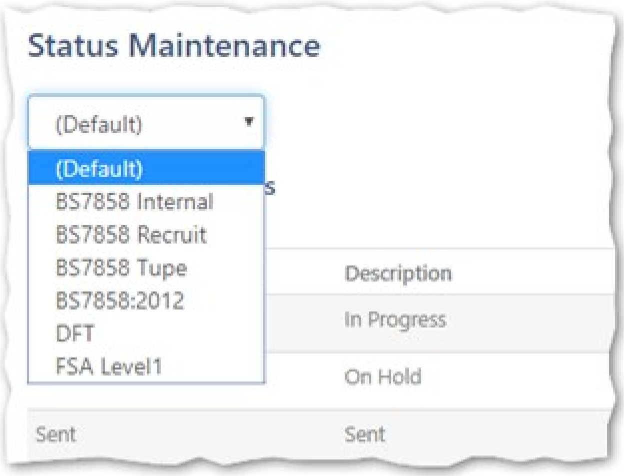
The Status column under PASS System Statuses detail the different stages the Applicant / Candidate will progress through. The different stages are:

- **Entered** – The applicant has been converted into a candidate using the PASS Workbench (either manually, or automatically), but the next stages of the screening process is yet to start
- **Permission** – The “Letter of Authority” reference is yet to be verified by the screening team
- **Pre-Checks** – Pre-Checks are being carried out by the screening team

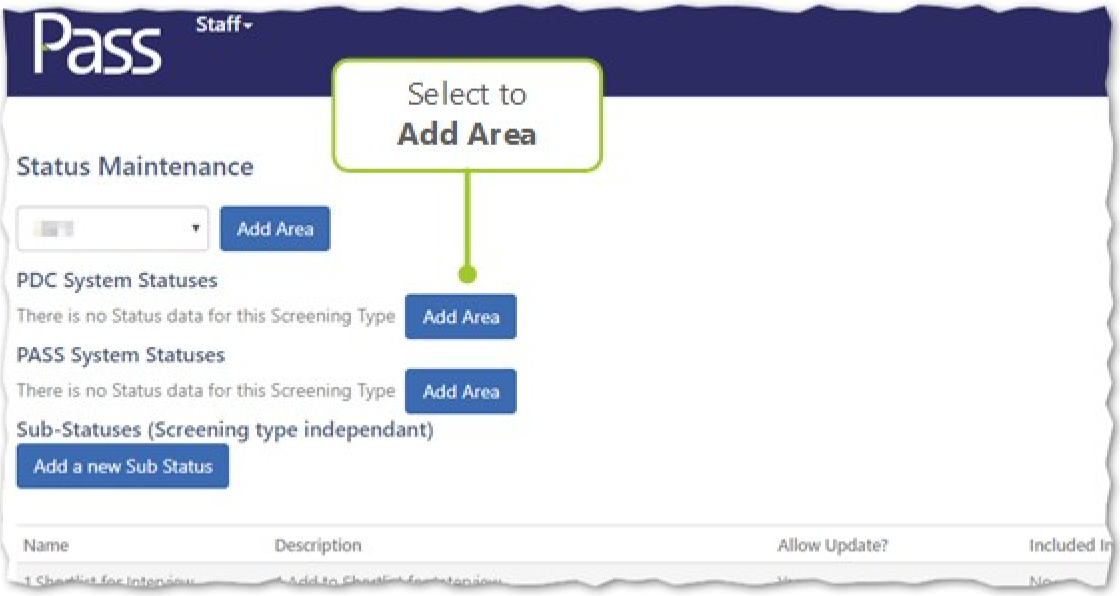
- **Provisional** – Provisional confirmation of references has been received by the screening team (i.e. a verbal confirmation may have been given to the candidate at this stage - although not all businesses use verbal confirmation of status)
- **Final** - Confirmation of references has been sought by the screening team (i.e. a written confirmation may have been given to the candidate at this stage)
- **Outstanding Actions** - Candidate Actions have been sent from PASS for the candidate to complete and are currently outstanding
- **Awaiting Sign Off** – Candidate's status cannot proceed until written approval by an authorised user
- **Complete** – Screening is complete
- **Cancelled: Candidate Left** - The first of three reasons for the candidate's status to be cancelled - decided to withdraw from the process
- **Cancelled: Unable to Complete** - The second of three reasons for the candidate's status to be cancelled - they are not able to complete the necessary steps to move to the next system stage in the recruitment process
- **Cancelled: Other** - The final reason for cancellation - a catch all field for reasons that are different to the previous two system statuses detailed above
- **On Hold** - When a candidate is put on hold

Screening Types - Adding your own Screening Type Specific Status

Default screening type values are shown as standard when you load the **Admin - Status Management** page. These are the main ones used. To add or update the system maintenance values attributed to your own different screening types, you select the screening type from the drop-down list as shown in the screenshot on the screenshot below:

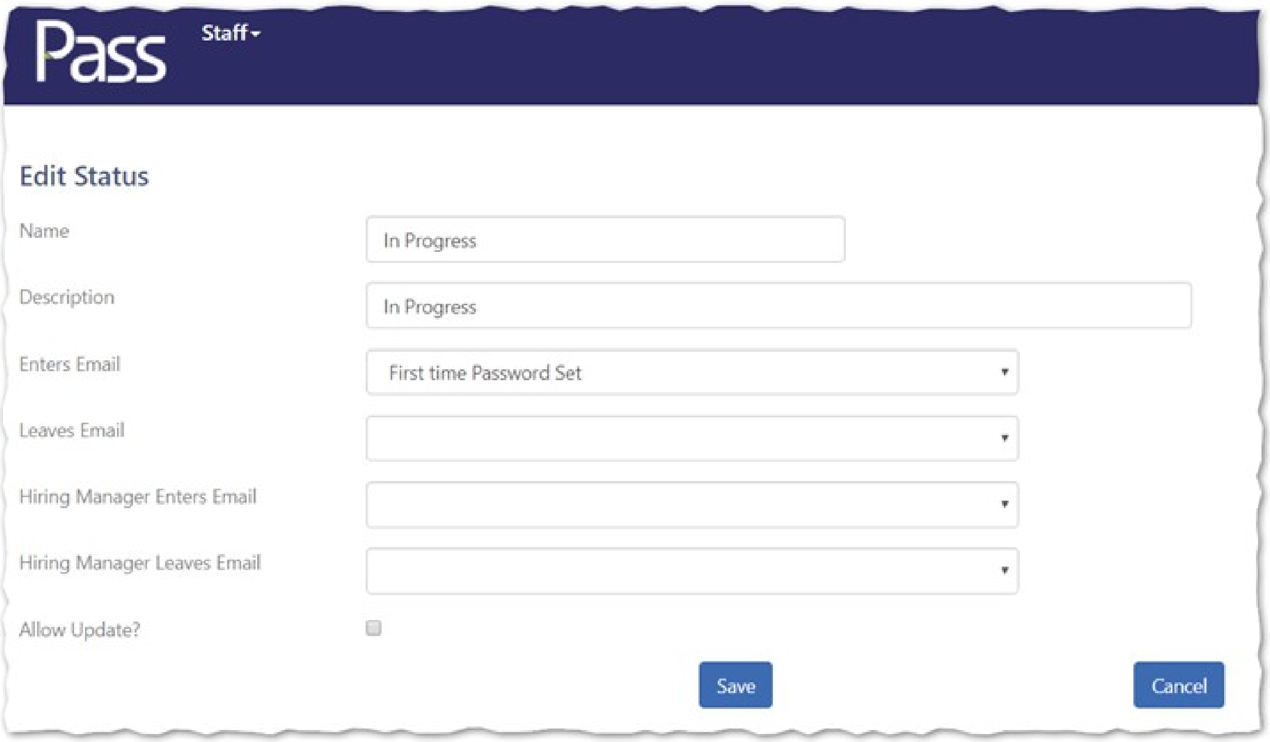


If there are no statuses attributed to the screening type, the following screen is loaded. Select Add Area to load up a blank matrix for completion with statuses and email updates:



Editing PDC or Pass system status

From the main screen, **Admin - Status Management**, select the **pencil icon** to edit or view the existing settings. A page similar to the one below will open:



Enter / edit the values in the fields:

- **Name** - Status name
- **Description** - Brief description of the status
- **Enters Email** - Select template (as applicable) for email that is sent to applicant (PDC Statuses) / candidate (PASS Statuses) when entering status

- **Leaves Email** - Select template (as applicable) for email that is sent to applicant / candidate (PDC Statuses) / candidate (PASS Statuses) when leaving status
- **Hiring Manager Enters Email** - Select template (as applicable) for email that is sent to hiring manager when entering status
- **Hiring Manager Leaves Email** - Select template (as applicable) for email that is sent to hiring manager when leaving status
- **Allow Update?** - When selected, the applicant is allowed to log back in to PDC and update their details. If Allow Update? is not selected, then the applicant is not allowed to log back in and update their details

Once completed, select **Save**

If you wish to revet to the old, last saved settings, select **Cancel**.

Please Note: Within the PDC system status page, you are given the opportunity to **Allow Update?** This option is not available in Pass. Candidate Actions are used instead.

Creating a Sub-Status

Sub-Status allow hiring managers to track where their candidates are in the recruitment process, for example, short-listed for interview, invited for interview, short-listed for offer, provisionally offered, talent pool, interview failed etc.

To create a new Sub-Status:

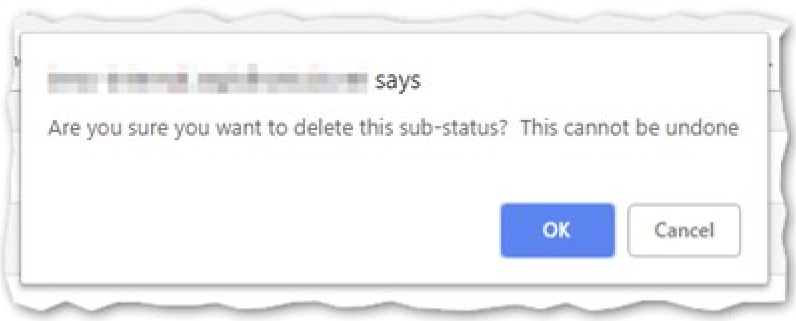
- Select **Add a new Sub Status**
- Complete the values on the screen that loads up, in the same way that you would edit PDC or Pass system status values (as detailed in the section about). The screen layout is as follows:

- In addition to those values, you should complete the following ones:
    - **Name** - The name of the Sub-Status
    - **Description** - A description of the Sub-Status (this will be displayed when selecting **Sub-Status**, not the name)
    - **Allow Update?** - When selected, the applicant is allowed to log back in to PDC and update their details. If **Allow Update?** is not selected, then the applicant is not allowed to log back in and update their details
    - **Include in Default Search** - Select if you wish for the sub-status to be used in the default search
- Select **Save**. If you decide not to save your changes, select **Cancel**.

Deleting Sub-Statuses

From the **Admin - Status Management** screen, if you decide to delete a **Sub-Status**:

- Select the **trash can (delete icon)** next to the **Sub-Status** of your choice. The following message will be displayed:



- Select **OK** to confirm the deletion, or **Cancel** to return to the **Admin - Status Management** screen

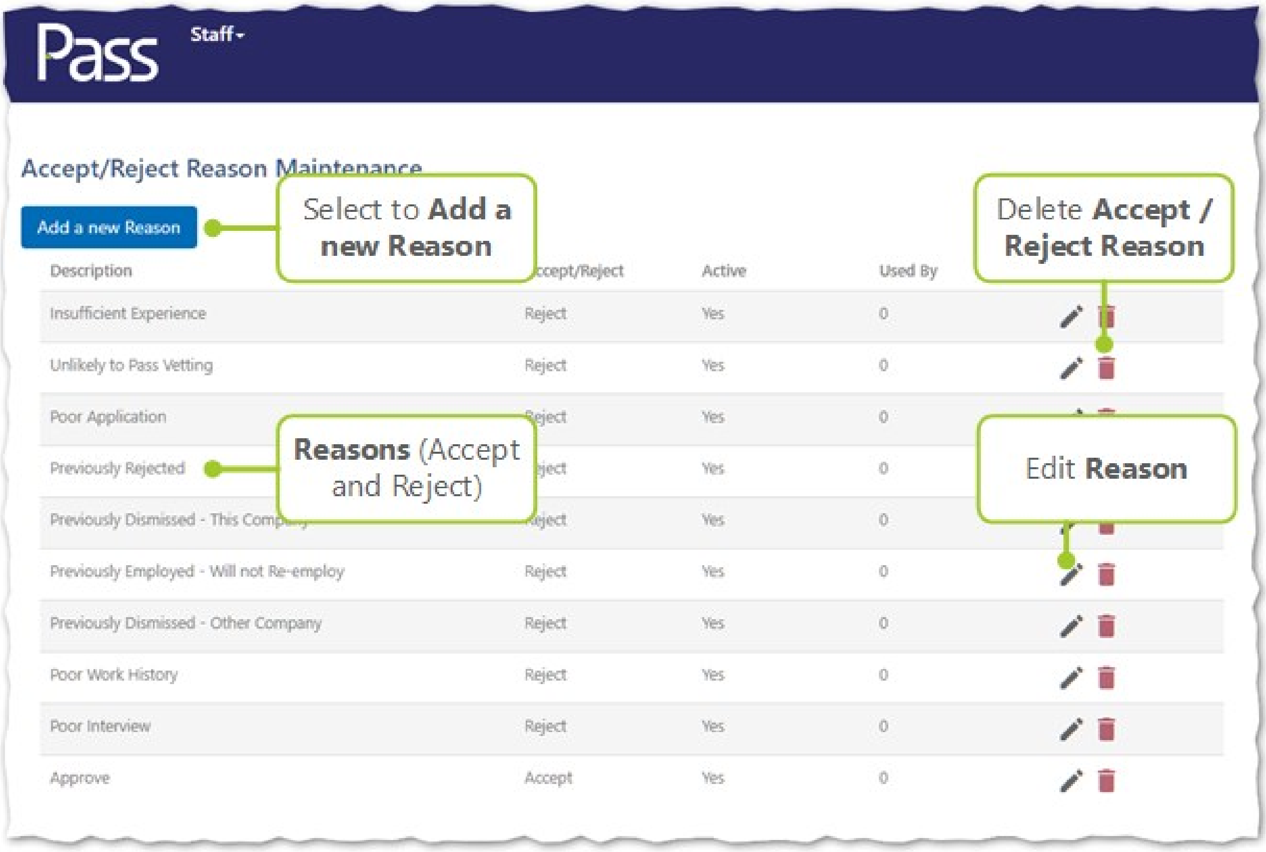
Please Note: Sub-Status that are presently in use by the system cannot be deleted. The following message is shown: 

ADMIN - ACCEPT/REJECT REASON MANAGEMENT

To access this part of the system, select Admin - **Accept/Reject Reason Management** from the **Staff** menu

Accept / Reject Reasons allow hiring managers to tag why their candidates have been accepted or rejected within the recruitment proces, for example, Poor work history, Insufficient Experience, Approved etc,

The **Accept/Reject Reason Management** administration screen is presented as shown below:



From the initial screen, you have three actions that are described in the sections over the next few pages:

- **Add a new reason**
- View / edit an existing accept or reject reason
- Delete an existing accept or reject reason

Add a new reason

To add a new reason:

- Select **Add a new Reason**. This will open a blank copy of the **Edit Accept/Reject Reason** as shown:

- Complete the reason by following Steps 1 through 4 below:
  - **Step 1** - Enter the **Description** for the reason to be displayed
  - **Step 2** - Select whether this is going to be an **Accept** reason or a **Reject** reason
  - **Step 3** - If you would like the reason to initially be Inactive (and not visible within the system), select the **Inactive** option, otherwise leave this unselected
  - **Step 4** - Select **Save**
- If you wish to cancel without saving your **Accept/Reject Reason**, select **Cancel**

View / edit an existing accept/reject reason

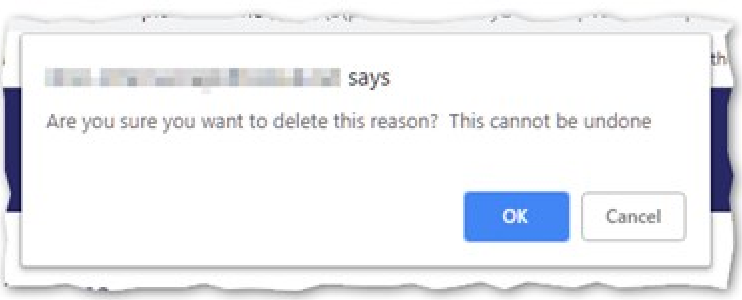
To view or edit an existing reason follow these steps:

- Select the **pencil icon** to edit or view an existing reason
- Modify the reason i.e. the **Description**, the **Accept/Reject** status and the **Inactive** option
- Select **Save** to save the changes
- Select **Cancel** to revert to the last saved state or if you have not made any changes (i.e. just viewed the reason)

Delete an existing reason

From the **Edit Accept/Reject Reason** screen, if you decide to delete an existing **Accept/Reject Reason**:

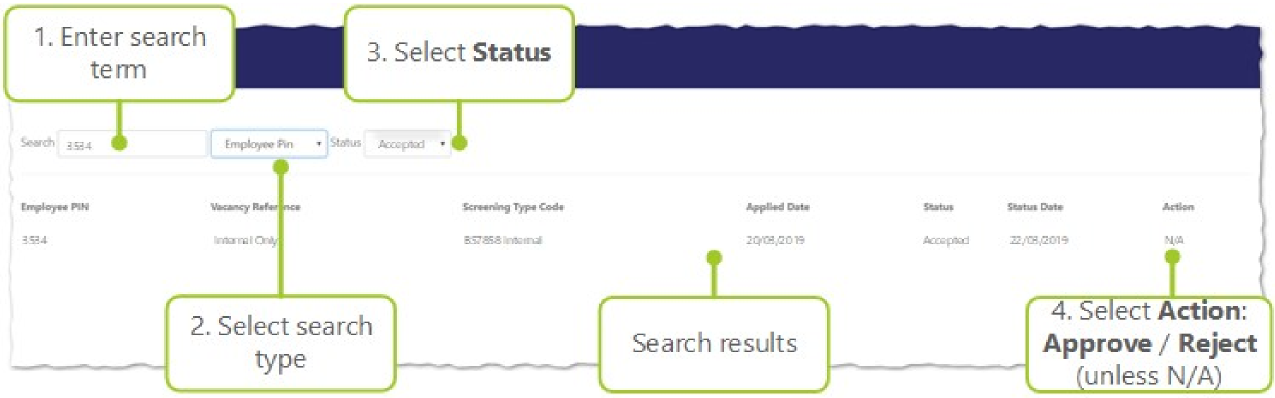
- Select the **trash can (delete icon)** next to the **Accept/Reject Reason** of your choice. The following message will be displayed:



- Select **OK** to confirm the deletion, or **Cancel** to return to the **Accept/Reject Reason Maintenance** screen

INTERNAL APPLICANTS

To access this part of the system, select **Admin - Internal Applicants** from the **Staff** menu:



The Internal Applicants screen, shows all internal vacancy applications that are waiting to be processed (those with a status of Applied). These applicants will have come from the Employee Portal in Timegate.

This screen is only accessible when the Vacancy Module is used and the vacancy is enabled on the Employee Portal.

The above is the default view when loaded, however, it can be filtered. The screenshot shows the results when a search term along with filters are applied for displaying accepted applications that aren't yet in Pass, where the Employee PIN is 3534.

To filter your results:

- Enter your **Search** term
- Select what you are filtering / searching by from the choices in the drop-down list: **Employee PIN, Vacancy Reference, Screening Type, Applied Date or Status Date**. These are straight text searches for any records containing the search text in the specified field. The following fields benefit further explanation:
  - The **Applied Date** is the date on which the employee applied for the vacancy.
  - The **Status Date** is the date on which the status of the application changed, to either **Accepted, Rejected** or **Sent**. Details of **Rejected** applications are never sent to Pass so those with a status of **Sent** have all been **Accepted**.
- Select the **Status** from the choices in the drop-down list: **All, Applied, Accepted** (but not yet sent to PASS), **Rejected**, or **Sent** (to PASS)

You are able to action applications from this screen. Applications that can be approved or rejected, have the two options available to you from under the **Action** header. If there is not a valid action, **N/A** will be displayed (as in the example above)

- To approve an employee's application select **Accept** on the line in the table against their PIN
- To reject an application, select *Reject* on the line in the table against their PIN

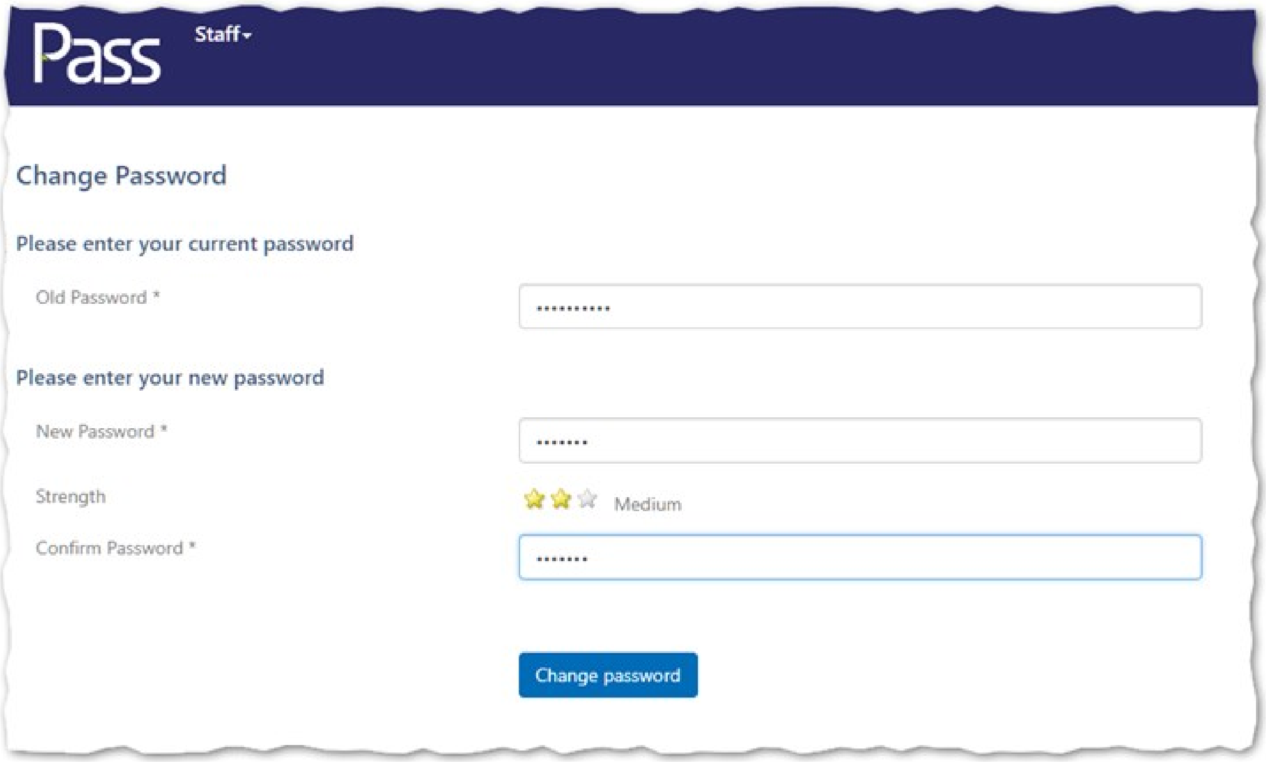
Please Note: Your decision can be reversed up to the time at which the page is refreshed and subsequently the application is sent. This eliminates problems if the wrong option is accidentally selected. After this time the decision cannot be reversed, and the applicant can only be removed via Pass.

Please Note: Pass only processes one application at a time so approving multiple vacancies for the same employee will cause all but one of them to be lost.

CHANGE PASSWORDS

Those customers who run Pass on Premise (rather than through the FM Cloud) have access to this page, where they can change their password.

To access this part of the system, select **Change Password** from the **Staff** menu



To change your password:

- Enter your **Old Password**
- Enter your **New Password**
- Confirm **Password**
- Select **Change Password**

When entering your **New Password**, you will see a strength indicator on screen. **Strength** is assessed from *Weak* (one star), through **Medium** (two stars) to Strong (three stars)

Please Note: If you are an On Premise customer and forget your password for Pass / PDC, you must contact your system administrator who will be able to reset your password.

Please Note: If you are an FM Cloud customer, to recover your password, you can do this via the FM Cloud.