Recruiting: Manage Candidates

Candidate Actions

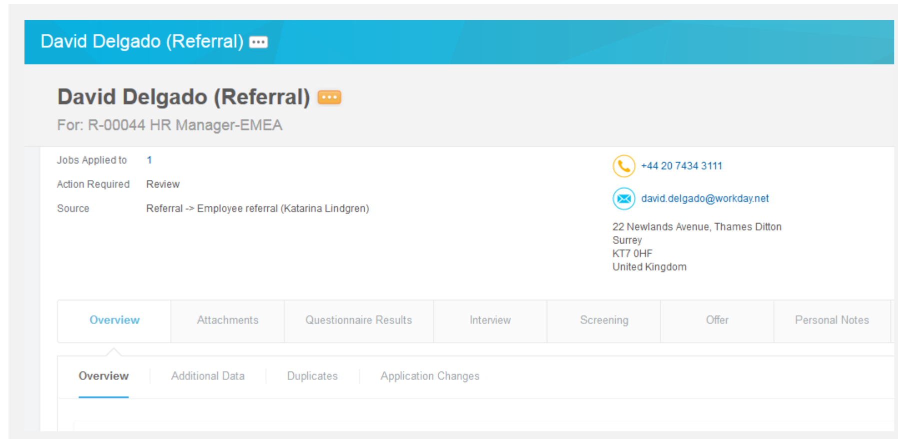
Once a prospect or candidate is entered in Workday, there are various actions you can take on their record, depending on your role. These include:

- Candidate Communication
- Create Job Application
- Edit Job Application
- Find Duplicates
- Invite to Apply
- Move Candidate
- Move to Linked Job Requisition
- Reactivate Job Application
- Send Message
- Set Do Not Hire Status
- Set Withdrawn Status
- Share Candidate
- Unlink Prior Worker
- Unmerge Candidate
- Undo Move

Navigate Candidate Tabs

From the Recruiting worklet access your candidates using the My Candidates action. Each candidate is attached to a record. Within this record, the information is organized into tabs, including:

- Overview tab
  - Overview (Work Experience, Education, Activity Stream, etc.)
  - Additional Data
- Screening tab
  - Assessments
  - Background Check History



- Questionnaire Results tab
- Interview tab
- Attachments tab
- Personal Notes tab
- Offer tab

Compare Candidates

From the Home screen:

1. Click the **Recruiting** worklet.
2. Click My Recruiting Requisitions

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3. Select the Job Requisition Status and click **OK**.
4. Click the job requisition link.
5. Click the Active Candidates **number**.
6. Click the **View By** pull-down list and select a category.
7. Click the **And Then By** pull-down list and select the second category to further compare your candidates.
8. Click the **Refresh** button.

Send Candidates a Message

Communication from an organization to a candidate through Workday is archived and searchable. From the Home screen:

1. Click the **Recruiting** worklet.
2. Click My Recruiting Requisitions
3. Select the Job Requisition Status and click **OK**.
4. Click the job requisition link.
5. From the **Overview** tab, Click the active candidate's **number**.
6. Right-click on the candidate and select **See in New Tab** to view the candidate's record.
7. Click the candidate's **Related Actions** > **Candidate Actions** > **Send Message**.
8. Type the subject and body of the message.
9. Click **OK** > **Done**.
10. Click the candidate's **Related Actions** icon > **Candidate Actions** > **Candidate Communication**.
11. Click **More** to view the entire message.

Manage Candidate List

Follow these steps if you would like to accept a candidate and decline the remaining applicants. From the Recruiting worklet:

1. Select **My Candidates button in** the Actions section.
2. Click the Candidate on which you want to take an action. There are several steps in the candidate process where you can move the candidate forward into extending an offer, including Schedule Interview.
3. From the Candidates related actions, select **Candidate Actions** > **Move Candidate**. From the **Move Forward** pulldown select **Offer**. Click **OK** then click **Done**. Now you will decline the other candidates for the specified position.
4. Click the **My Open Job Requisitions** - **Recruiter** worklet.
5. Select the position for which you are mass declining candidates.
6. Click the Candidates tab.
7. Click the **All Active Candidates** button, then click the checkbox next to the Candidates you want to decline. This will allow you to decline multiple candidates at once.

> Note: Select **Awaiting Action** to only view candidates awaiting your action.

8. Click **Decline** and then select a **Disposition Reason**.
9. Click **OK**. You can opt to send a mass email to the candidates.

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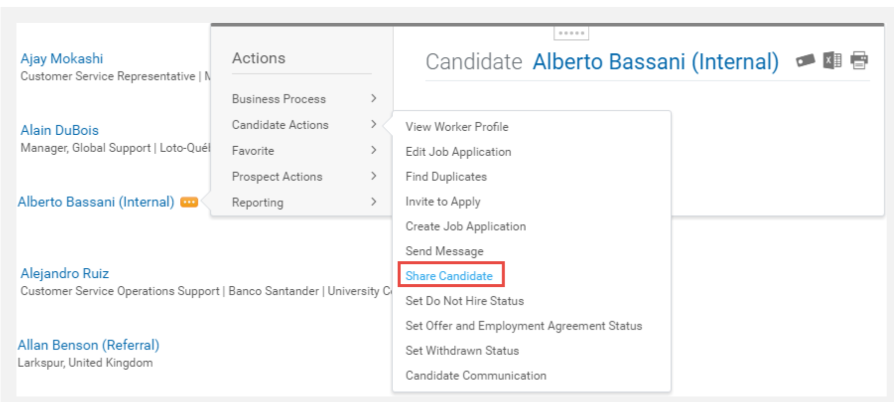
Note: If a candidate was not processed, they are in the business process where the reason “Change of interest or availability” is not possible. If this happens, right-click on their name and select **See in New Tab** > **Decline** > **Candidate not interested**.

Share a Candidate

As the recruiter, you can share a candidate with a hiring manager. From the Recruiting worklet:

1. Click **Find Candidates** under the Actions section.
2. Search for the candidate in the Filter By field.
3. Select the candidate.
4. Click the candidate’s **Related Actions** icon > **Candidate Actions** > **Share Candidate** > **OK**.

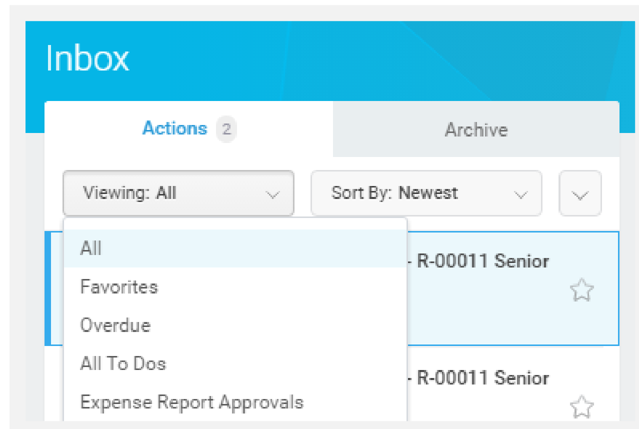


5. If the person is a prospect and not yet a candidate, from their **Related Actions**, select **Prospect Actions** > **Share Prospect**.
6. Enter the employee name in the Share With field and include a message, if needed.
7. Click **OK** and **Done**.

Inbox Filters

An Inbox filter enables you to limit the action items visible in your Inbox. You can create a personal Inbox filter that is available only to you, or an administrator can create a system filter that can be used by defined security groups.

1. Click the **Profile** icon > **Inbox**.
2. Click the **Viewing: All** pull-down list > **Edit Filters**.



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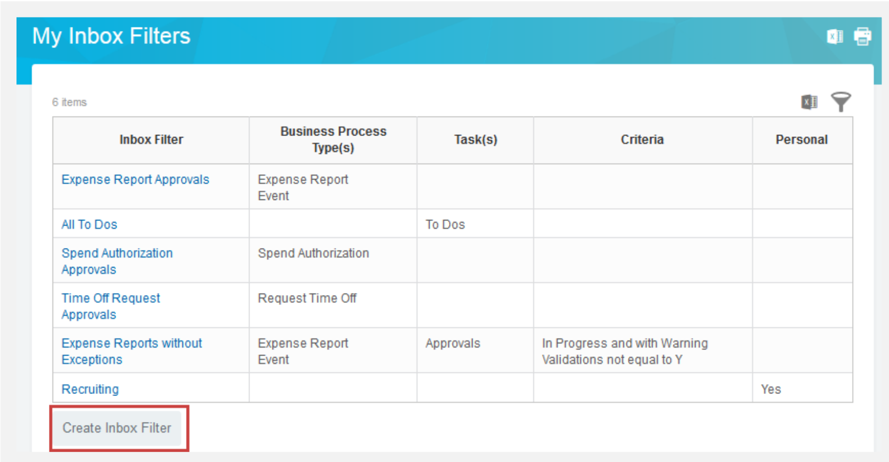
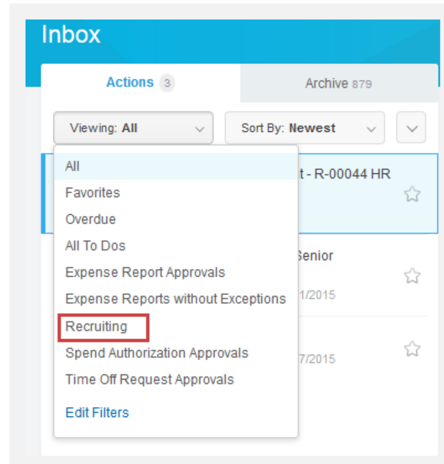


Inbox Filter	Business Process Type(s)	Task(s)	Criteria	Personal
Expense Report Approvals	Expense Report Event			
All To Dos		To Dos		
Spend Authorization Approvals	Spend Authorization			
Time Off Request Approvals	Request Time Off			
Expense Reports without Exceptions	Expense Report Event	Approvals	In Progress and with Warning Validations not equal to Y	
Recruiting				Yes

3. Click **Create Inbox Filter**.
4. Enter a description to the filter, such as *Recruiting*.
5. Select whether this filter will be used for all business processes or specific ones, such as Assess Candidate, Background Check, Interview, Job Application, Propose Compensation Offer, Reference Check, and Screen.
6. Select a task if you want to filter by Common Tasks (Approvals, Attach Document, or To Dos), By Business Process Type, or Tasks in Inbox.
7. Select a Source External Field, Relational Operator, Comparison Type, and Comparison Value in the Conditions table (e.g., All Locations for Job Requisition, Exact match with the selection list, and Value specified in this filter). Your selection will vary based on the criteria needed for the filter.
8. Click **OK** and **Done**.

Validate Filters

1. Navigate to your Inbox.
2. Click the **Viewing: All** pull-down list and select the newly named file.
3. Scroll through the list of Inbox items and validate that only the items you have indicated are listed.



Create a Candidate Pool, Add Candidates, and View a Candidate Pool

Candidate pools can be created to group candidates by defined criteria. Pools can include internal and external candidates. You can create as many pools as needed, and a candidate can belong to multiple pools.

Note: In order to create Candidate Pools, your organization must have the feature enabled and assign you the appropriate role to manage them.

1. Navigate to the **Create Candidate Pool** task.
2. Enter the name of the pool, add a description if needed, and click **OK**.
3. Click **Find Candidates**. You can also add candidates to a pool from their record by clicking the **tag** icon  and selecting the candidate pool from the prompt.
4. Select the criteria by which you want to filter your candidates (Skills, Types, Total Years of Experience, etc.).
5. Select the candidates you want to add to your pool, and click **Add to Pool**.
6. Select the name of the pool you just created from the prompt and click **OK** and **Done**.
7. Navigate to the **View Candidate Static Pool** report.
8. Select the appropriate pool from the prompt. Now you can view the candidates you just added to the pool.