WORKDAY FOR MANAGERS

RECRUITING

Manage Candidates

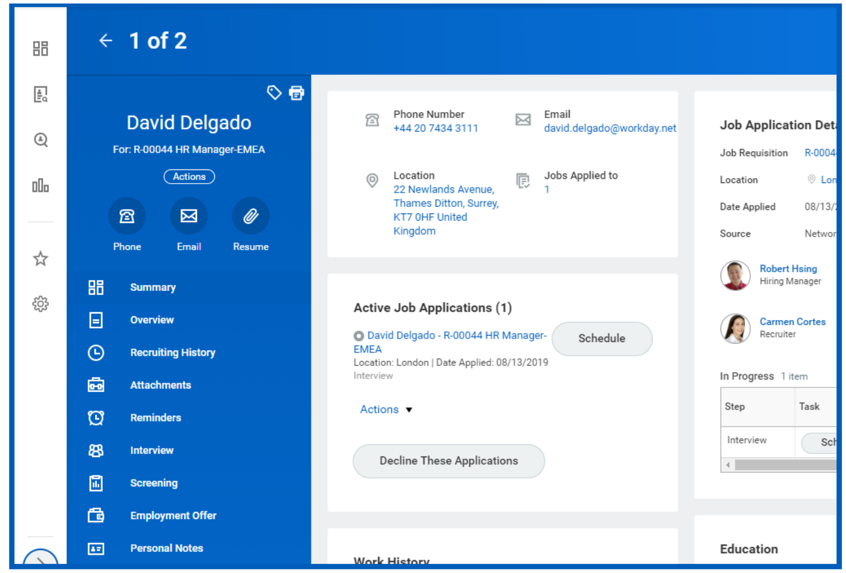
CANDIDATE ACTIONS

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- Set Withdrawn Status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

NAVIGATE CANDIDATE TABS

From the Recruiting application, in the Actions section, access your candidates by clicking the **My Candidates** button, then click a candidate's name. Each candidate is attached to a record. Within this record, the information is organized into tabs and subtabs, including:



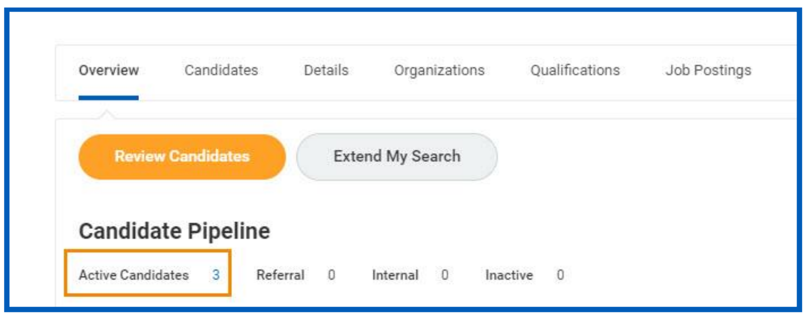
- Summary
- Overview
  - Overview (Work Experience, Education, Skills, etc.)
  - Personal Information
  - Additional Data
  - Duplicates
  - Application Changes
  - Candidate Communication
  - Tags / Pools
- Recruiting History
- Attachments
- Reminders
  - Upcoming
  - Completed

- Interview
  - Interview Schedule
  - Interview Feedback
- Screening
  - Assessments
  - Background Check History
- Employment Offer
  - Employment Offer Details
  - Attachments
- Personal Notes

ANALYZE CANDIDATES

From the Home screen:

1. Click the **My Open Job Requisitions - Recruiter** application.
2. Click the **Job Requisition** link.
3. Click the Active Candidates **number** from the **Overview** tab.



4. Click the **View by** pull-down menu and select a category.
5. Click the **and then by** pull-down menu and select the second category to further compare your candidates.
6. Click **Refresh**. Here, we see an organized list of the active candidates.

SEND CANDIDATES A MESSAGE

Communication from an organization to a candidate through Workday is archived and searchable.

From the Home screen:

1. Click the **My Open Job Requisitions – Recruiter** application.
2. Click the **Job Requisition** link.
3. From the Overview tab, click **Review Candidates**.
4. Select the **checkbox** next to the desired candidate and click the **Send Message** button.
5. Under Setup, choose the communication Channels applicable for this message, Notification Design and Message Template, if you wish.
6. Enter a Subject and Body. Also, add a message for Push Notifications and insert message tags if you wish, review your message and click **OK** to send your message.

Note: To view your communication, search for the candidate. From the candidate's profile page, click the candidate's Related Actions, and select Candidate Actions > Candidate Communication.

MANAGE CANDIDATE LIST

Follow these steps if you would like to perform mass actions from the Candidate List.

From the Recruiting application:

1. Click the **Job Requisition** link.
2. Select a **Job Requisition** from the list and click **OK**.
3. From the Overview tab, click **Review Candidates**.
4. Select the checkbox next to the desired candidate or candidates and click the **Move Forward** button.
5. Select an option from the Move Selected Candidates to Next Stage list and click **OK**.

From the Recruiting application:

1. Select the **My Open Job Requisitions – Recruiter** application.
2. Click the requisition you are performing a mass action on.
3. Click the **Candidates** tab.
4. Click **All Active Candidates**, then select the checkbox next to the candidates you want to decline. This allows you to decline multiple candidates at once.
5. Click **Decline** and then select a Disposition Reason.
6. Click **OK**.

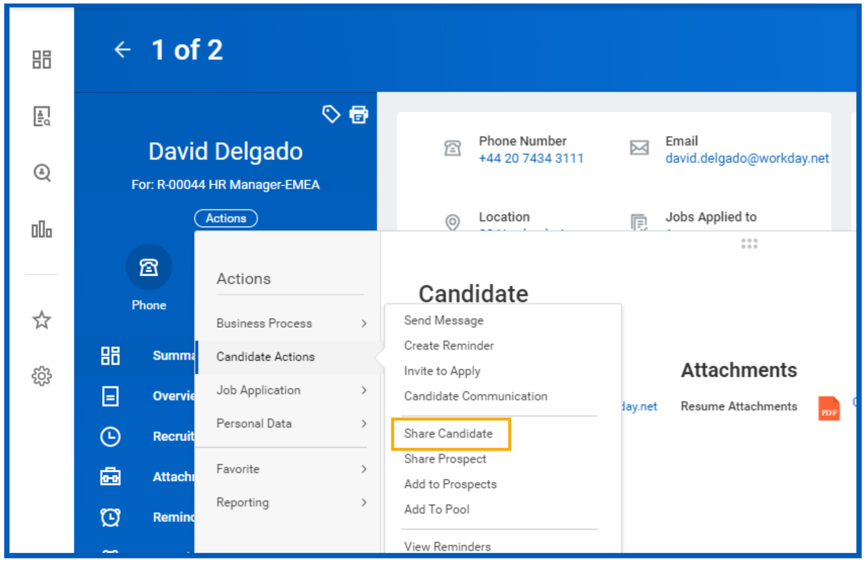
Note: For candidates in the review stage, you can mass Move Forward to the next step (screen, interview, etc.). Candidates past the review stage should be moved forward by opening their Candidate Objects and selecting the Move Forward button. If this button is not available, then the candidate has steps remaining to perform. The Awaiting Action on the candidate list will indicate who should complete the action.

SHARE A CANDIDATE

As a recruiter, you can share a candidate with a hiring manager.

From a Job Requisition:

1. Click the **Candidates** tab.
2. Click a candidate's name link.
3. Click the candidate's **Related Actions** button, and select **Candidate Actions** > **Share Candidate.**
4. Click **OK**.



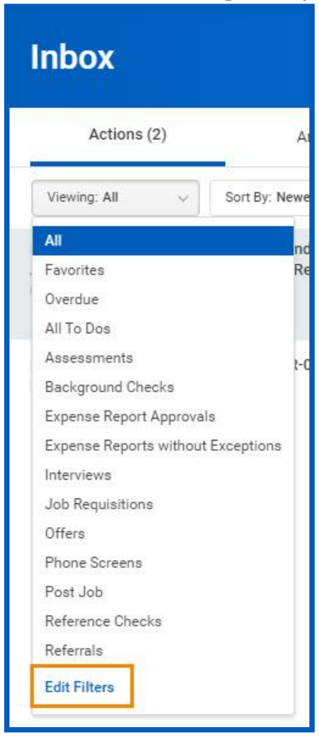
5. The candidate name and the requisition to which they are applying to autopopulate but can be edited, if needed. Click **OK** to continue.

6. Enter the employee name with whom you are sharing in the Share With field, and include a message, if needed.
7. Click **OK** and **Done**.

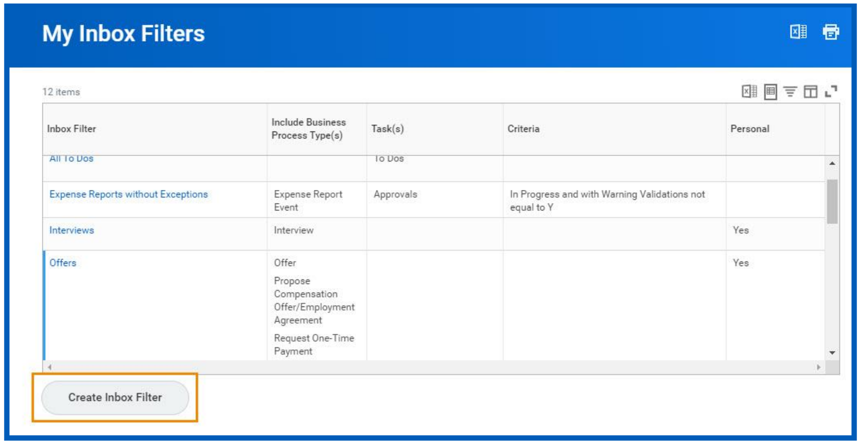
INBOX FILTERS

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. Also, an administrator can create a system filter available to defined security groups.

1. Click the **Inbox** icon in the upper-right corner.
2. Click the **Viewing: All** pull-down list and select **Edit Filters**.



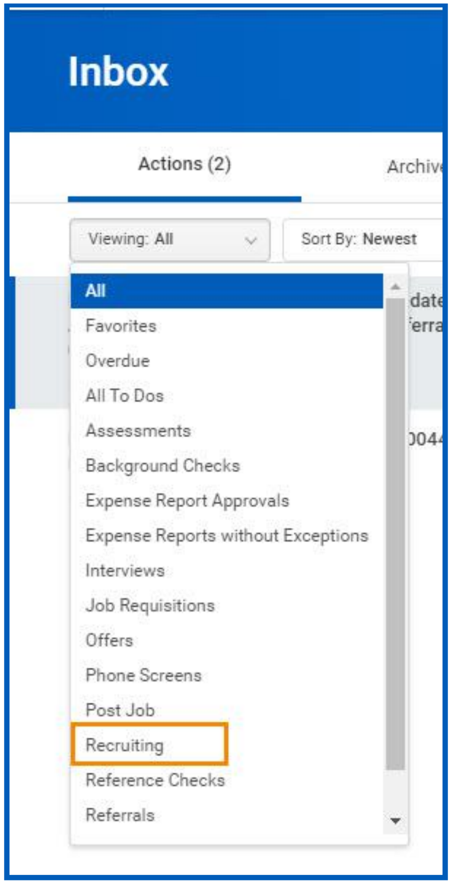
3. Click **Create Inbox Filter**.



4. Enter a description for 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 the **Inbox**.
2. Click the **Viewing: All** pull-down list and select the newly named filter.
3. Scroll through the list of Inbox items and validate that only the items you have indicated are listed.

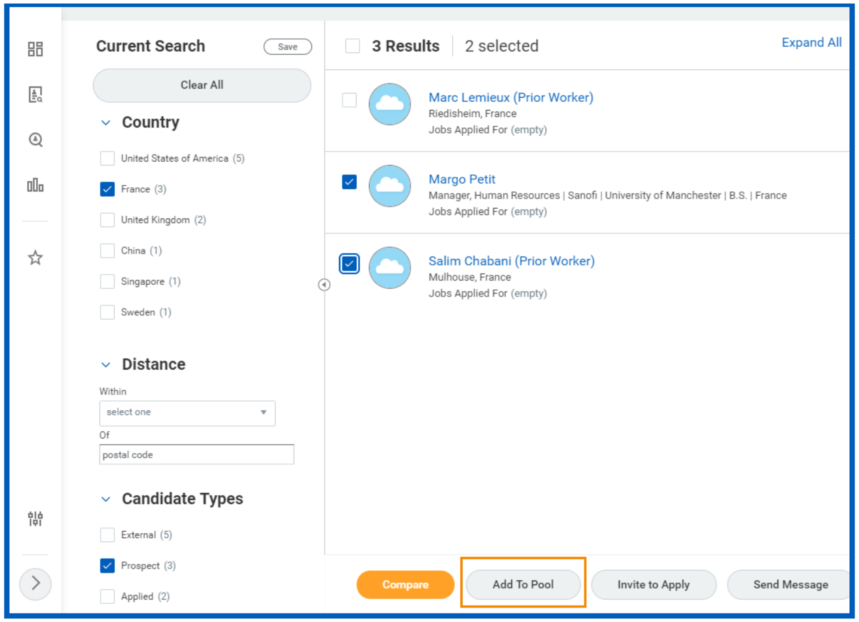


CREATE A CANDIDATE POOL, ADD CANDIDATES, AND VIEW A CANDIDATE POOL

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: To create candidate pools, your organization must have the feature enabled and assign you the appropriate role to manage the feature.

1. Navigate to the **Create Candidate Pool** task.
2. Enter the name of the pool and add a description, if needed.
3. Choose a pool Type. Dynamic Pool will automatically find candidates that fit your search criteria such as location, skills, and source. Static Pool will let you manually find candidates that fit your search criteria.
4. Click **OK**.
5. If you create a dynamic pool, fill out as many or as little criteria as you want. If you create a static pool, click **Find Candidates**. You can also add candidates to a pool from their record. Click the **Tags / Pools** tab located in the Overview subtab. Then click the **Add /Edit** button. Select a candidate pool from the prompt.
6. For a static pool, select the criteria by which you want to filter your candidates from the Current Search side bar (e.g., Skills, Prospect Type, Total Years Experience).
7. Select the candidates you want to add to your pool and click **Add to Pool**.



8. Select the name of the pool you just created from the prompt and click **OK** and **Done**.
9. Navigate to the **View Candidate Pool** report.
10. Select the appropriate pool from the prompt and click **OK**. Now, you can view the candidates you just added to the pool.