Viewing the Pipeline

Pipeline · https://learnpcr.pcrecruiter.net/site/docs/pipeline/viewing-the-pipeline/

The Pipeline is used to track a user's Candidates in relation to a specific position including what Step they are in during the Interview Process and any Activities that are happening along the way. This can include things such as Telephone Interviews, In Person Interviews, Background Checks, Referral Calls, and additional options that can be catered to your specific organization. The Pipeline also allows for easily interacting with the Candidates via a quick Drag and Drop of their Record Card, or Adding an Interaction with complete details.

There is also a Detail Pane which allows for a quick overview of the Candidate Record, Viewing Notes, and quickly paging through Resumes of the Active Candidates.

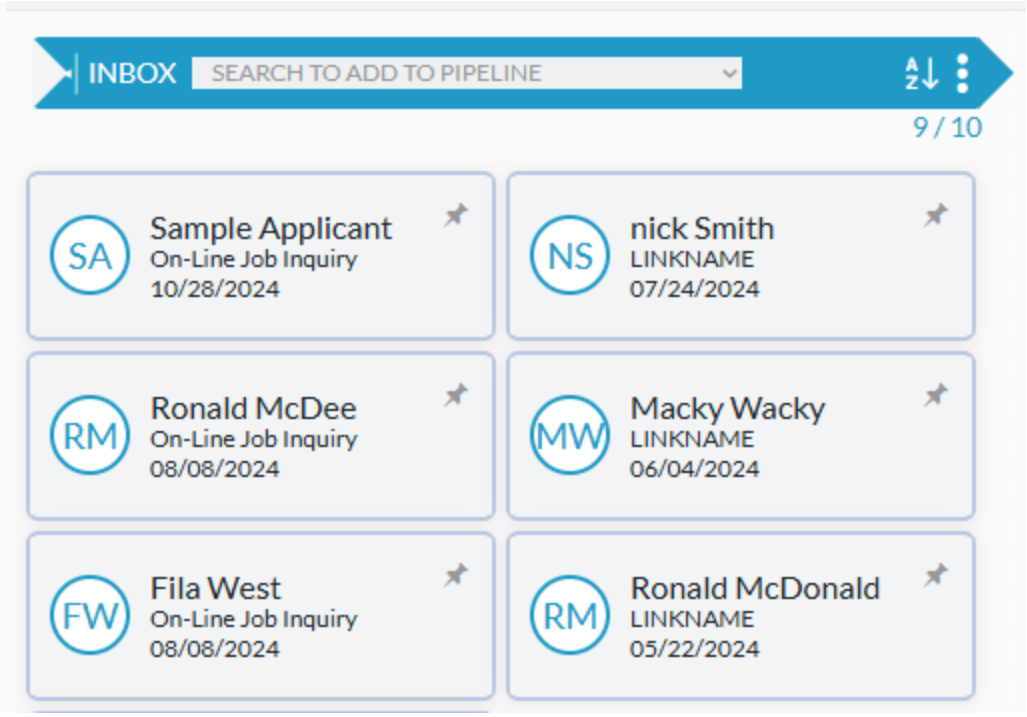
Click here for a step by step interactive course on the New Pipeline. Don’t have a login? Contact your administrator or reach out to PCRecruiter support for assistance.

Navigating the Pipeline

Below we will explore navigating the features available inside of the Pipeline

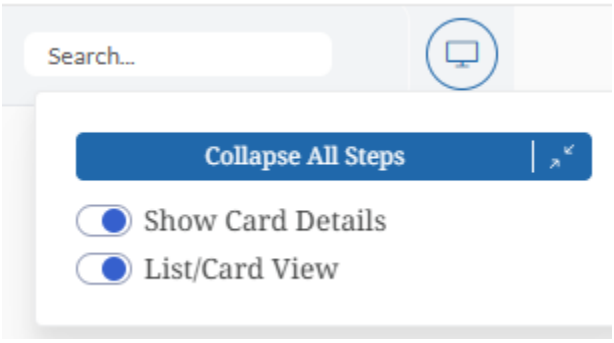
Inbox

The Inbox will show all Names that have been Linked to the Pipeline by a user or who have applied to the Position via the PCRecruiter Job Board (or other 3rd party sites that may be linked). Below the record's Name, Linkname or Online Inquiry will be displayed as well as the date that the action took place.



Pipeline View Options

Located in the top right corner of the Pipeline, the Pipeline View Options allow you to adjust the View of your Pipeline quickly and easily. You can choose to display or hide additional Card Details, switch between the Card and List view or Expand/Collapse all of the Columns.



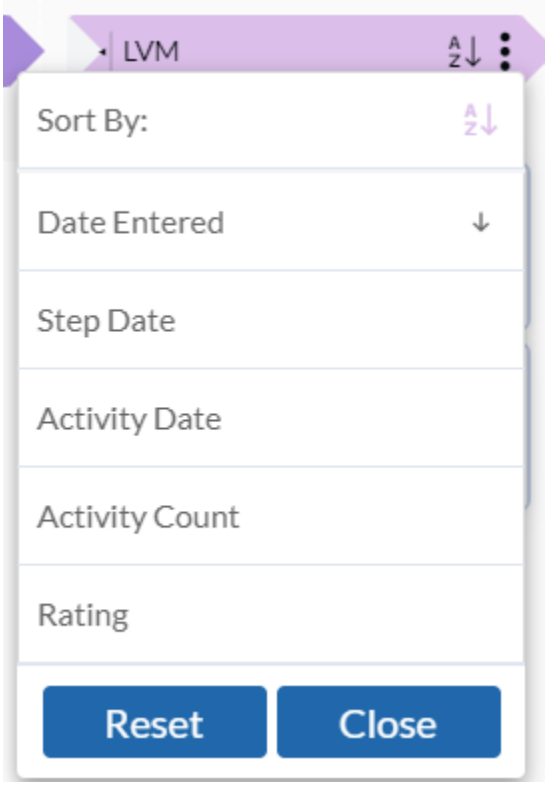
Sorting

Each Step can be sorted by clicking the ‘AZ’ icon at the top. Once you select the **icon** you can sort Ascending or Descending by the following options:

- Date Entered
- Step Date
- Activity Date

- Activity Count
- Rating

Whichever option you choose will be displayed as the bottom line on the record card. (Note: The sort feature does work within the Inbox and Placements, but the display will not change to reflect the sort field name).



Actions/Out of Process

At the bottom of the Pipeline you will see Actions and Out of Process options. Once records have been selected, you can choose to move them Out of Process or complete an Action via these options.



Open Candidate Record from the Pipeline

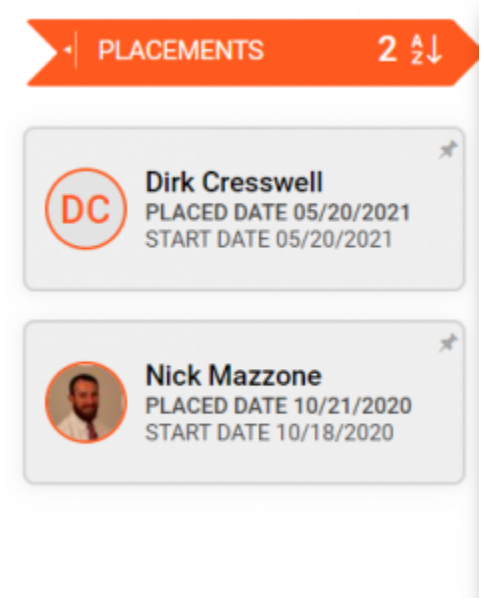
To open the Candidate Record from inside of the Pipeline, you can right-click on the Name Record Card and click **Open Detail Pane**

You can also navigate to the Candidate's Name Record by clicking the **Record Icon** within a Card.



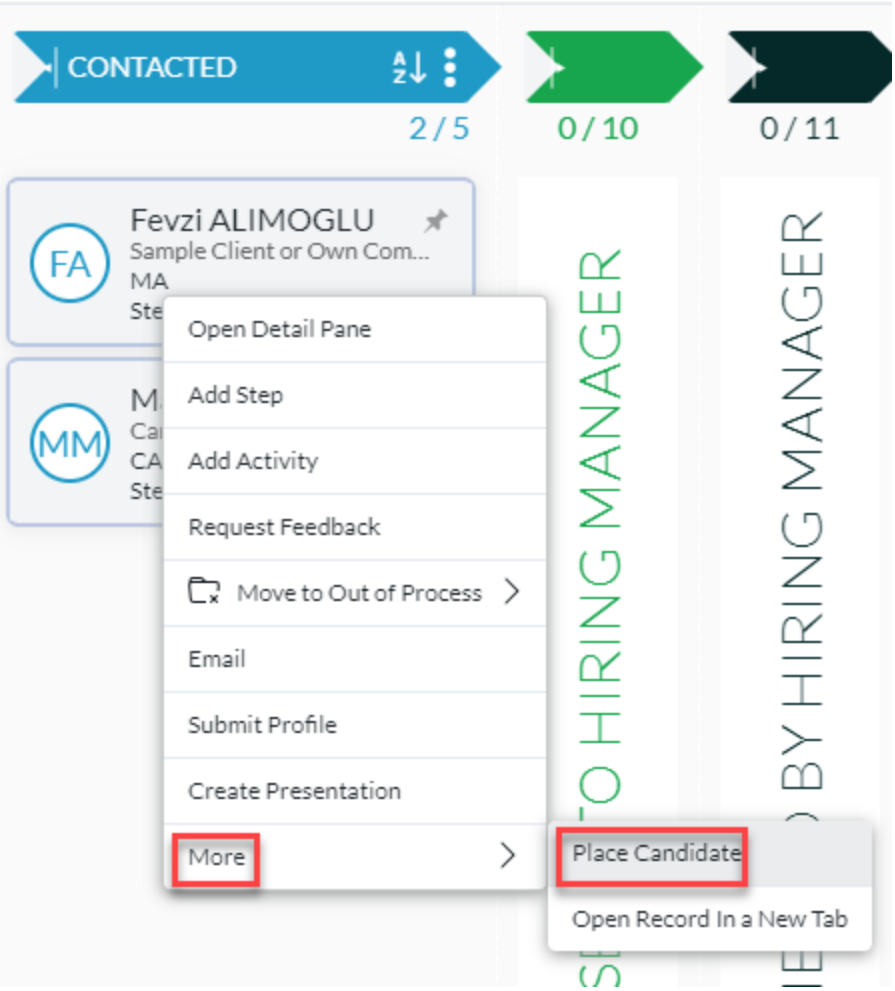
Placements

Placements are the final step in your Pipeline process. Here you will find all Candidates that have been placed either Permanently or on Contract for the Position. To Place a Candidate, simply **drag and drop** them into this step, you will then be prompted to **select** if it is a Permanent or Contract Placement. Once you make a choice you will then be prompted to enter the Placement Details.



Once a Candidate is Placed, **right-clicking** will allow you to View the Placement Details or Delete the Placement (Deleting the Placement will return them to their previous Step).

By right-clicking a Candidate, you can also choose Place Candidate from the action menu. Go to 'More' and then select 'Place Candidate.' Doing so will automatically move them to the Placements area.

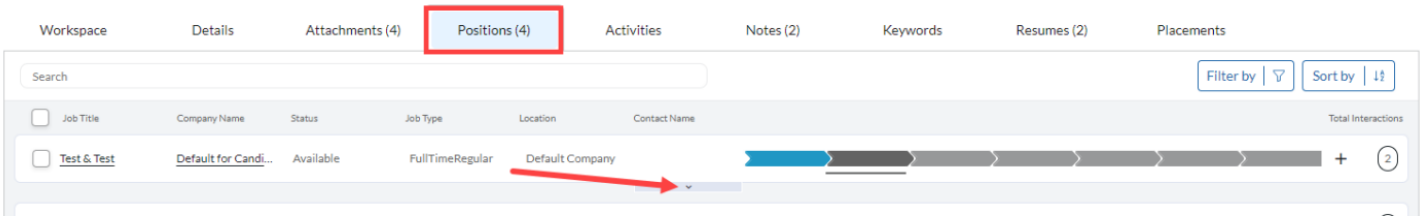


When viewing a card in the Placements Step the Placed Date and Start Date will always be displayed.

Other Pipeline Views

Name Pipeline

The Name Pipeline allows users to see an overview of a Candidate in relation to any positions they are in the Pipeline for. This view can be accessed by selecting **Positions** from the Navigation Menu on a Name Record.



Once on this screen, you will see each Position they are linked to, and you can determine where they are in the process by using the following key:

- If a Step is colored in, they have been (or are currently) in that step
- The Horizontal Bar under a Step shows where they currently are in the process
- An Outlined Step indicates that the Candidate skipped that Step
- A grayed out Step indicates that the Candidate has not yet gotten to that Step

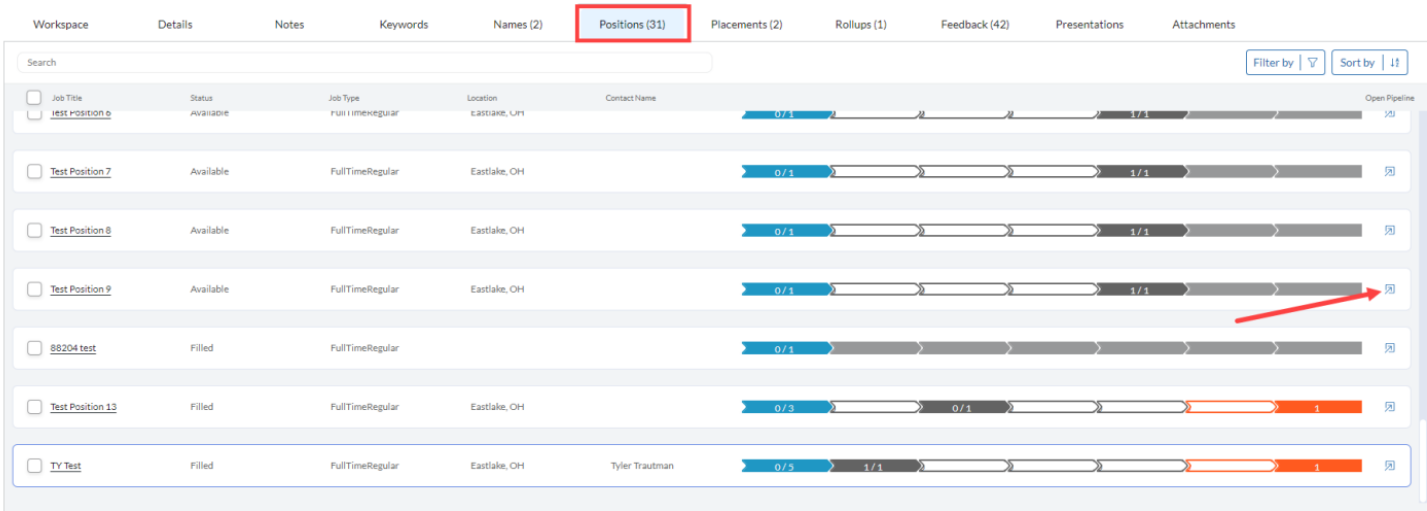
Click the **arrow** to expand each row to view additional details. From here, you can click any **Step** and Edit it.



If you wish to add a Step to a Candidate or move a candidate Out of Process, you can do so by clicking the corresponding **'+' icon** for the Position on the Right.

Company Pipeline

Similar to the Name Pipeline, Company Pipeline screen allows you to see all Positions for a Company and an overview of each Pipeline. This view can be accessed by selecting **Positions** from the Navigation Menu on a Company Record. This overview screen will show you a count of how many Candidates are currently in a Step vs. how many Candidates have ever been in the Step.



Note: Any Positions using the legacy Pipeline will not show a Pipeline Overview. You will need to access the Pipeline from the Position to view the details.