Candidate Presentations Setup

Presentations · https://learnpcr.pcrecruiter.net/site/docs/presentations/candidate-presentations-setup/

Candidate Presentations streamline the process of sharing candidate information by offering a customizable link-based approach. Instead of traditional email attachments, you send a secure link that recipients can use to access comprehensive candidate details, including field data, resumes, attachments, and a tailored write-up.

This feature provides control over link expiration and document download permissions, allowing you to manage information accessibility efficiently.

On the client side, recipients can conveniently leave feedback on candidates within the platform, triggering notifications for improved communication.

Enabling Candidate Presentations

The Candidate Presentations Security options can be accessed by a system administrator by following these steps:

1. Select **Settings** from the Main Menu.
2. Select **Users**.
3. Select **Manage Users**.
4. Choose the user you would like to modify presentation security for.
5. Choose the **Security** charm on the left.
6. Open the **Other** tab.
7. Locate the two Presentations Securities
    - Presentations
        - **Read Only:** Allows users to see what presentations have been sent and view any feedback that has been submitted when viewing the corresponding records.

        - **Send, Edit:** Users with this permission are able to view presentations and feedback as listed above. This setting also allows a user to send a presentation and edit the presentation settings such as expiration date.
        - **Templates, Send, Edit:** Also considered 'Full Permission' for Presentations. Users with this setting will have the above permissions but can also create/modify presentation templates.
    - Presentation Overall List
        - **Full Permission:** Allows users to access the list of all presentations and feedback; this is accessed via the system menu.
        - **No Permission:** Blocks users from accessing the list of all presentations and feedback. Note: This only disables accessing the information from the system menu, the user will still be able to view the filtered details on the corresponding records.

8. Click Save.

Presentation Letters

Presentation Letters, though not mandatory, provide a convenient template for presenting candidates. Alternatively, if you prefer not to create a presentation letter, you have the flexibility to compose your presentation email on demand.

1. Select **Settings** from the Main Menu.
2. Choose **Form Letters**.
3. Choose **Presentation Letters**.
4. Select **Add Letter**.
5. Enter a **Name** for your letter (This will auto populate as the subject of your email when sending).
6. Leave as your **username** or change to a global letter if desired.
7. Choose the **Letter Type**:
    - **Name:** Can be sent from a name record, name rollup list, or name search results
    - **Position:** Can be sent from a pipeline and allows you to insert fields in relation to the Position record and Company Record

8. Enter the **email body** into the text box (this can be edited prior to sending).
9. Use **Insert Fields** option to enter the following: Recipient First or Last Name, System fields (Username, Date, Signature, etc.), and any profile link.
    - As stated above, if you are creating a position letter you can include position details in your form letter.
10. Use **Presentation Link** insert field to include the link to the presentation - this is mandatory as it is how the recipient will access the candidates being presented.
11. **Save** when finished.

Presentation Templates

To begin using Candidate Presentations an admin user must configure at least one presentation template (We have added a few to get you started allowing you to skip this step and revisit it if needed). This template will then become available to all users who can then utilize the template to present candidates (Note that most selections can be modified upon sending the Candidate Presentation). To access your Presentation setup do the following:

1. Select **Settings** from the Main Menu
2. Choose **Candidate Presentation Templates**

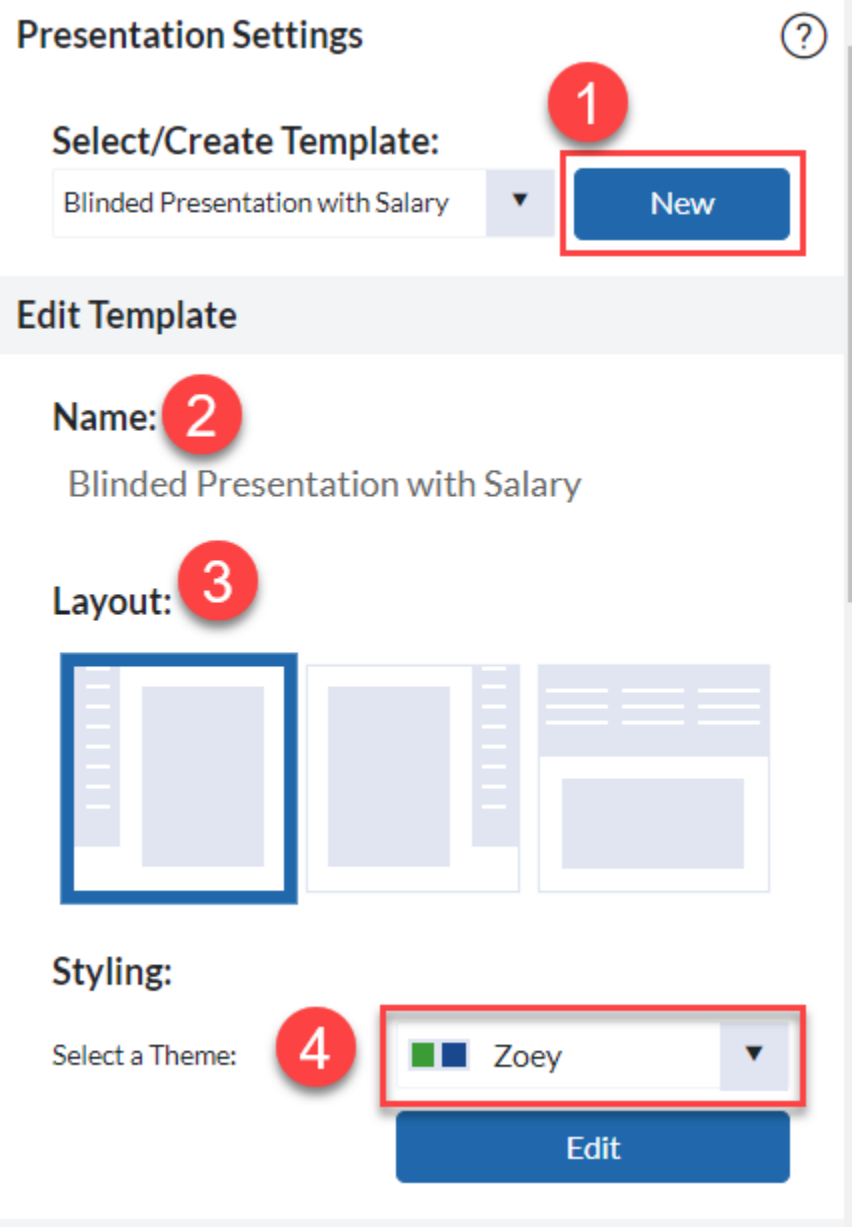
Presentation Settings

The Presentation Settings control the basics of your presentation; including design, automations and expiration.

1. Select a **Template** to modify or choose **New** to create a new template.
2. If you have chosen to create a new template, enter a **Template Name**.
3. Choose one of the 3 available layout options:
    - Side by side with **field data on the left**
    - Side by side with **field data on the right**
    - **Up and down**
4. Use the theme selector to select the theme you would like to use for your template; this will automatically apply a color scheme to your presentation. (Themes can be customized using CSS.

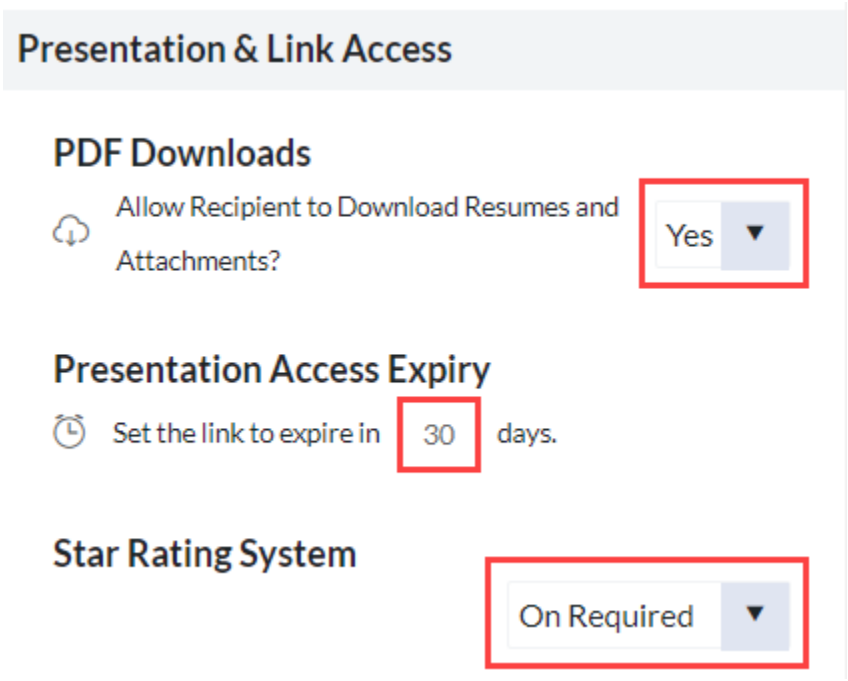
Contact support if you would like pricing on customizing the available theme colors.)

- Aero
- Kona
- Tito
- Tucker
- Zoey



- **Presentation and Link Access**: Sets the number of days until the link expires. When a presentation is sent, the number of days will commence, once the length of time expires, the presentation will no longer be accessible. If desired, an email will be triggered on 'X' days prior to

expiration, just be sure to enter or select the email address you would like the notification triggered to in the Notifications and Pipeline Automations area. This section also allows you to permit the user to download the resumes or attachments as a PDF and turn on/off or require the star rating.

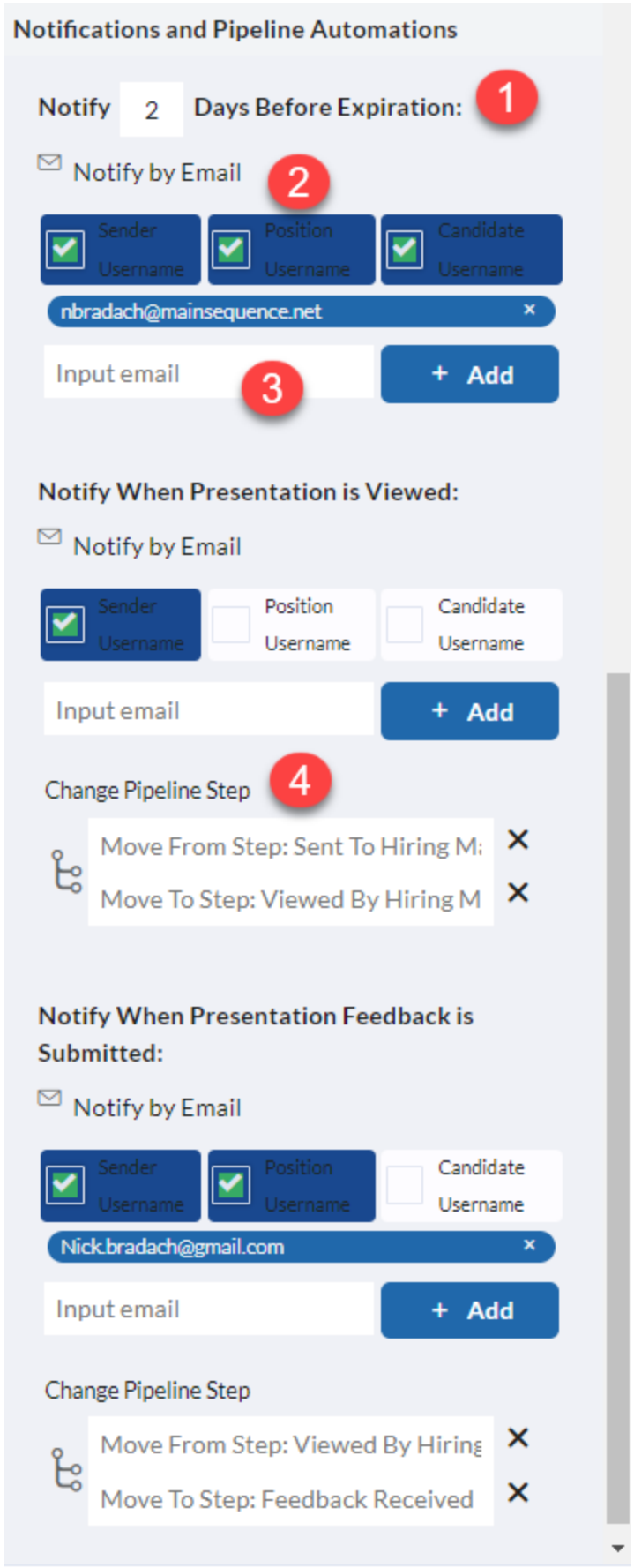


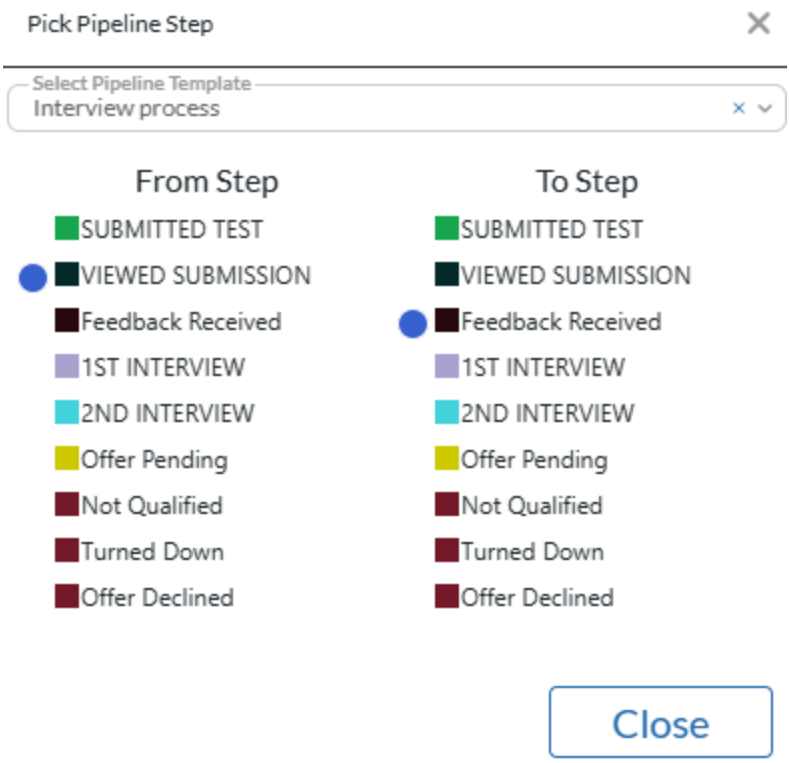
Notifications and Pipeline Automations:

This area is used to trigger email notifications and automatically conduct pipeline movement upon a recipient opening and providing feedback for a presented candidate.

1. **Set Number of Days Before Expiration:** The number of days put here will trigger the notification email to be sent to the selected recipients.
2. **Select Email:** Choose the Sender Username, Position Username, and/or Candidate Username to be notified when the action takes place. Note: Position Username is only available when sending from a Pipeline. And if a candidate applied via your job board there is no active username assigned unless a user manually modifies the field.
3. **Input Email:** There are three input email fields; these fields are used to trigger an email notification when a presentation link will expire, is viewed by the recipient, or feedback is provided from the recipient. Upon these actions happening the email is triggered accordingly to the email address that has been entered.

4. **Pipeline Automation:** These are also triggered by a presentation being opened or feedback being submitted. If you decide to utilize this feature you will need to make the following selections.
    - Select the **‘From’** step: Clicking here will open a popup window where you will need to select the Pipeline that this automation should occur with. (If not selected the candidate will move regardless of the step they are currently in).
    - Select the **‘To’** step: Repeat the above process to select the step you wish the candidate to be moved to.
    - Once the presentation has been opened or feedback has been submitted for a candidate the candidate is then automatically moved to the selected step from the pipeline if they currently reside in the selected 'From' step. (Note: This will only work with the Pipeline Template you have selected).
    - Example: When sending a candidate presentation you move all of the presented candidates to “Candidate Submitted” once a hiring authority provides feedback the candidate is automatically moved to “Feedback”, but if they had been moved to “Phone Screen” they would not be moved.


Notifications and Pipeline Automations
Notify 2 Days Before Expiration:
1
Notify by Email
2
Sender Username
Position Username
Candidate Username
nbradach@mainsequence.net
Input email
3
+ Add
Notify When Presentation is Viewed:
Notify by Email
Sender Username
Position Username
Candidate Username
Input email
+ Add
Change Pipeline Step
4
Move From Step: Sent To Hiring M
Move To Step: Viewed By Hiring M
Notify When Presentation Feedback is Submitted:
Notify by Email
Sender Username
Position Username
Candidate Username
Nick.bradach@gmail.com
Input email
+ Add
Change Pipeline Step
Move From Step: Viewed By Hiring
Move To Step: Feedback Received



Design Window

The design window (Viewing pane to the right) is used to control the candidate data displayed when being presented. This includes field data, resumes, profiles and attachments.

1. Select your **header**: You may either drag and drop an image into your header, or click to select an image.
2. Click the **Show Toggle** on or off to display/hide the candidate names from the presentation, this will only show when multiple candidates are selected.
3. Selected **Fields**: In the fields column drag and drop Available Fields to Selected Fields or click the add/remove icons; the selected fields will be displayed when the candidate presentation is sent. These fields can also be renamed by clicking on the pencil icon.
4. **Documents:** There are numerous document types that can be included in your presentation. To add them, select **‘Add Section’**, name the section and then choose your document type. Sections can be removed by clicking the '**Delete Section**' button.
    - **Resume**: Choose the Current Resume or Blinded Resume.
    - **Attachments:** Choose Attachment, then select the attachments you wish to include. This list will include all profiles and global attachments in your database.

- **Profiles:** If you select a profile from the attachment list a dropdown will appear to the right. This dropdown will have two options "Only if Completed" and "Attempt to Generate". If you choose "Only if Completed" the profile will only be included for candidates who have the specified profile completed for their record. If you select "Attempt to Generate", the profile will be generated using the linked fields on the profile
- **Candidate Specific Attachments:** Unique attachments can be added to an attachment section during the sending process, click here for instructions.

- **Candidate Write-Up:** A blank text area that allows the sender to write an on the fly synopsis about the candidate or to insert the candidate summary from the name record.

5. Once the presentation template is completed you can click **'Preview Presentation'** button to review the template format.
6. Don't forget to **Save the Template** when finished.

