­IBM BrassRing on Cloud

**Candidate Management Quick Reference Guide**

This Quick Reference Guide is provided without branding and can be edited by your organization as needed.

## Searching Candidates

You can search for candidates in two ways:

1. **Quick Search**: Available on the multiple pages in BrassRing. Use Quick Search to search for Candidates, Reqs, or Candidates within a specific Req. Select the arrow () to select the type of search, enter the search details, and select the magnifying glass () to search.



* **Candidates** – search by candidate name or for specific skill in the candidate resume.
* **Reqs** – find specific reqs by req number or name.
* **Candidates in Req** – find candidates that are in a specific req.
1. Select **Menu (****)> Candidates > Search.**  Use this search to find candidates in BrassRing that match the criteria entered on the search page.
* Use the *Refine Results* section to add your search criteria. Expand the search fields using the arrow () icon.
* As the filters are selected, the search results update with candidates matching the selected criteria.
* Select Save Search to save all filters and criteria to be run later.
* Select Load Filters to run a saved search.
* Select Manage Saved Filters to edit or delete saved filters (searches).

## Working Folders

* Working folders can be used to organize resumes or CVs. They can be used to file resumes from searches or file resumes for frequently open or potential jobs
* Candidates can remain in working folders until they have been qualified. After that they need to be asked to apply online for the position.
1. To create a working folder, select **Menu > Candidates > My folders > Add new**.
	1. Insert a **folder name**.
	2. If needed, **select other users** to give access to the working folder and the resumes in it. As the creator of the Working Folder, your name is automatically selected.
	3. Select **Submit**.
2. To Edit, Deactivate or Delete Working Folders, select **Menu > Candidates > My folders > Working** and select **the folder** to edit, deactivate or delete.
	1. Select **Actions**, and select **Edit**, **Deactivate** or **Delete** as needed.
3. To file candidates to working folders, from a list of candidates, select **the candidates** to be filed.
	1. Select **Actions > File to Folder**.
	2. In the *Destination* section, select **the working folders** to add the candidates to. Note: Do not select an initial HR status. The default HR status is *0-Filed*.
	3. Select File.

## eLinks

* eLinks allow the recruitment team to send resumes and other information about candidates, or reqs for approval by using email.
1. To send a candidate by using an eLink, from a list of candidates select the candidates to be sent.
	1. Select **Actions > Send eLink**.
	2. In the eLink window, insert **the recipients** of the eLink into the *Send to* section.
		1. **Systems Users** are BrassRing users. Select the names from the pull-down menu.
		2. **Non-system users**’ email addresses can be inserted into the **Email address** field.
	3. Enter a **Subject**, **Message**, select any **forms for the recipient to complete**, select any **forms for the recipient to view**, and **add any attachments** as needed.
	4. Select Notify me when these forms have been submitted to receive a notification when the form is submitted.
	5. Select **Send**.
2. To eLink a blank form for a Hiring Manager or candidate to complete, from a list of candidates, select **the plus icon** () in the *Forms column*, or the **forms icon** ().
	1. Select **the Form** to send by using the pull-down menu.
	2. Select **eLink Blank Form**.
	3. Insert **the recipients** of the eLink into the *Send to* section.
		1. **Systems Users** are BrassRing users. Select the names from the pull-down menu.
		2. **Non-system users**’ email addresses can be inserted into the **Email address** field.
	4. Enter a **Subject**, and **Message** as needed.
	5. Select Notify me when these forms have been submitted to receive a notification when the form is submitted.
	6. Select **Send**.

## Forms

* Completed forms are attached to a candidate’s talent record.
* Some forms can only be completed from within a Req, and some forms can only be created once per req for a candidate.
1. To add a form for a candidate, from a list of candidates, select **the plus icon** () in the *Forms column*, or the **forms icon** ().
	1. Select **the Form** to send by using the pull-down menu.
	2. Select **Add**.
	3. Complete the form fields. Fields marked with an asterisk (\*) are required,
	4. Select Submit.
2. To view or edit a form, from a list of candidates, select the **forms icon** ().
	1. The list of completed forms opens.



* 1. Select the **Form name** to view the form, or the **pencil icon** () to edit the form and select **Submit** to save any changes.

## Update HR Statuses

* To update a Candidate’s HR status, the candidate must be in a req folder.
* Some HR statuses, such as Interview Evaluation, have forms associated with them that will automatically pop-up when the HR Status is selected.
* A final HR status, such as Not Interested, can have a Disposition form appear. Complete the form as needed.

1. From a list of candidates, select **the HR status hyperlink**, for example ().
	1. Select **the new HR Status** and select **Submit**.
	2. Select **Advanced Options** to open the *Update HR Status* window.
		1. In the *Update HR Status* window, select **the new HR status** by using the pull-down menu.
		2. Select an **Action date** as needed.
		3. Select **Update HR Status**.

## Hiring A Candidate

1. Update all candidates that are not to be hired to a final **non-hired HR status**.
2. Update the candidate to be hired your organizations equivalent of a **hired HR Status**.
3. If applicable, edit the closed req and complete the **Add Type**, **Employee name** and **Start date** fields.

## Send Communications to a candidate

1. From the list of candidates in a req, select **the candidates** and select **Actions > Send Candidate Communication**.
2. Select the **communication type** by using the pull-down menu and select **Go**.
	1. For *email communications*, insert the sender and recipient details, a subject, message, any Links to jobs on a Talent Gateway, attachments and select Send.
	2. For *Letter Templates*, verify that there are 0 missing merge fields and select **Continue**.
		1. If there is any missing information a red flag  appears in the Candidate and merge information section. Select the plus icon to view and correct the missing information.
		2. Select whether to **generate the letter now** or **send it for batch processing** and select **OK**.
			1. If generating now the letter downloads for printing.
			2. If sent for batch processing an administrator can print the letter as part of a batch.
	3. For *Document Packet Templates*, insert a subject, message, add any attachments from the Talent Record and select **Post to Candidate Zone**.