



Hiring Managers User Guide

Welcome to The Applicant Manager! In order to make your transition to TAM as smooth and seamless as possible, please refer to this document for basic instructions on navigating TAM. If you have additional questions, please contact our Help Center at support@theapplicantmanager.com.

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Hiring Managers User Guide

TAM is designed with role-based access control. That means that you, as a hiring manager, do not have full access to all the features of TAM. The ability to create user accounts, change company-level settings, and create and edit job postings is reserved for those with Administrator privileges. Your administrator will assign job positions and applicants to you. If you are having trouble accessing any data in TAM, please contact your administrator.


Once an administrator has assigned a job position to you, the Hiring Manager, you can do the following:

- View all data (resume, cover letters, screening responses, etc.) on applicants who have applied to the position
- Manage the applicants, including making comments and notes
- Rate the applicants based on your impression from interviews, etc.
- Share applicant information with other hiring managers
- Communicate to applicants by email

Getting Started

Your Desktop

You may configure your desktop to show the items that are important to you.

1. Click on the Select Widgets on Desktop icon  to configure the display of desktop widget
2. Check the box above any widget you want to remain on your desktop
3. Click on the Select Widgets on Desktop icon when you're done

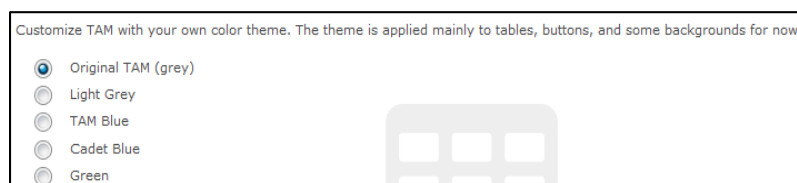
Your Email Signature

Set up your email signature template.

1. Under "Hi <yourname>" on the top bar menu, choose *MySettings*
2. Choose *Email Signature*
3. You can **Show company logo at the top of email** by clicking the box
4. You can add your signature to appear at the end of every email sent from TAM.
5. Click *Save* when you're done.

Personalize

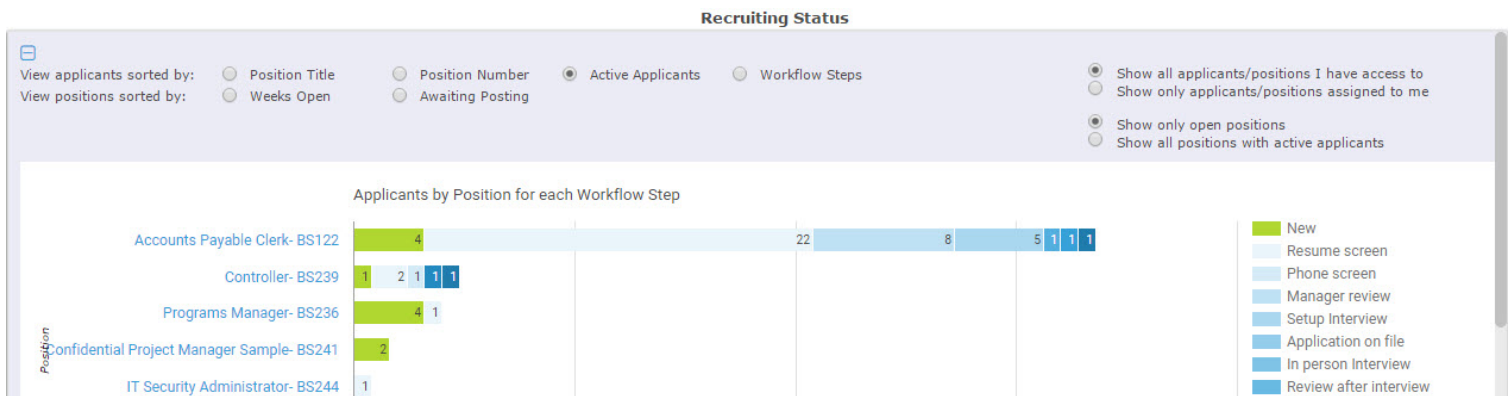
You may also customize TAM's color theme, how you want to sort positions, and how you want to view the Applicant's page. Simply click on the option you want. Be sure to click *Save* when you're done.



Managing Applicants

When you login to TAM, you will be able to see all your active applicants on your Desktop. As a hiring manager, you will only be able to see applicants who applied to positions assigned to you, or you have been given access to by an administrator or other hiring manager.

The Recruiting Status widget is displayed on the desktop by default. TAM gives you an overview of the number of applicants you have for each position assigned to you as well as a breakdown of the number of applicants at each hiring step within that position. Let's take a look at the example:



For the example above, we can see that there are five positions available to this hiring manager: Accounts Payable Clerk, Controller, Programs Manager, Confidential Project Manager and IT Security Administrator. For the position of Programs Manager there are four applicants in New status and one applicant in Resume Screen status.

To see the details of the applicants, click on the number 4. This will pull up the Applicant Table with additional details for all 4 applicants.

Click on the last name to pull up the Applicant page

Select	Last Name	First Name	Date Applied	Status	Referred By	How many years of Accounting experience do you have?	What Accounting software are you experienced in?	Location	Assigned to	Distance (in miles)	Phone
<input type="checkbox"/>											
<input checked="" type="checkbox"/>	Nakamoto	Edna	2016-01-14	New		2-4 years	NetSuite	San Rafael, CA	Recruiter, Regina	0	855-254-1277
<input checked="" type="checkbox"/>	Morris	Mary	2015-12-13	New		0-2 years	Quickbooks	San Rafael, CA	Recruiter, Regina	1	510-206-8907
<input checked="" type="checkbox"/>	Nhuch	Roberto	2015-12-11	New		0-2 years		San Rafael, CA	Recruiter, Regina	1	415-378-6169
<input checked="" type="checkbox"/>	Keyes	Alan	2014-06-20	New		6 or more years		San Rafael, CA	Recruiter, Regina	3	415-456-7890

Only applicants in New status are displayed

Notice that in this case the Applicants Table displays only those applicants at the *New* stage. This can help streamline your hiring process. For example, if you are ready to review new applicants, pull up your applicants in the ‘new’ stage, and you can simply go down the list and decide the next step for each applicant.

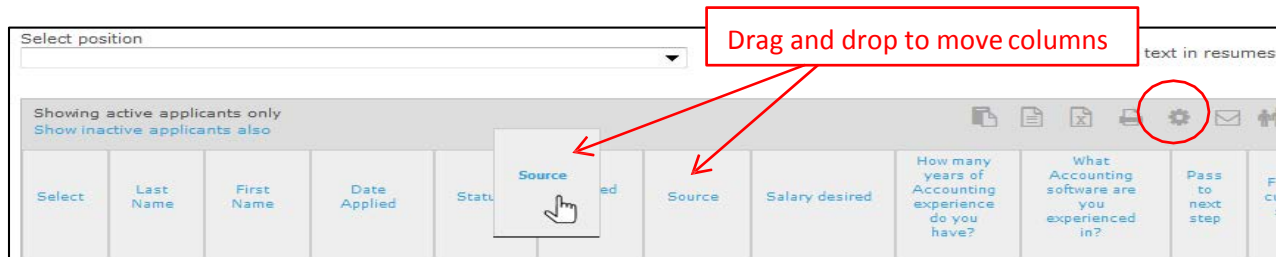
Applicants Table

You can also access the Applicants Table as follows under *Talent Pool* on the top bar menu, choose *Applicants*

Settings

1. Click on the gear in the row of icons at the top of the table. You can choose the columns that you want displayed on your table.

TIP: To arrange columns to your liking, simply click on the column, drag it to where you want, and drop.



Position

From ‘Select position’, use the pull-down tab to choose the position you’d like to view. You can sort by the position number or by position title. Applicants applying to that particular position will be loaded.

Note: by default TAM only loads active applicants. Once an applicant has been rejected (failed) they become inactive and are hidden from view. To view inactive applicants just click on the “Show inactive applicants also” link.

Sort/Filter/Prescreening Questions

Take a look at the Applicant Table on the next page. There are multiple options to help you narrow down your view to make analyzing candidates easier. All columns, including those with prescreening questions, work the same.

A - To **sort** data in a column, click on the column title. Data is sorted by ascending order and if clicked again, data will be sorted by descending order.

B - To **filter** data, simply enter the first few letters or numbers of your search. For example, if you have a workflow step called ‘phone screen’, entering ‘ph’ in the Status column will pull up all applicants at the ‘phone screen’ stage. Similarly, you can enter a number to filter columns with number responses. Filter searches are very convenient if, for example, you are looking for a particular status, skillset, or salary range.

C – To search through applicants’ resumes, enter a keyword in the box indicated. TAM will search through the resumes, cover letters, etc. of those applicants displayed on the Applicant Table. You may enter complete or partial words; for example, you can enter ‘MS Word’, ‘Word’, etc.

A Click here to display inactive applicants

B Enter a value to search through resumes within TAM

C Click on a column arrow to sort ascending/descending

D Enter a keyword to search for attachments for applicants displayed

The screenshot shows the TAM applicant list interface. At the top, there is a search bar labeled 'Search for text in resumes' (B). Below it, a table lists applicants with columns for Select, Last Name, First Name, Date Applied, Status, Referred By, How many years of Accounting experience do you have?, What Accounting software are you experienced in?, Location, Assigned to, Distance (in miles), Phone, Address, and City. A red box labeled 'A' points to the 'Load inactive applicants' link. A red box labeled 'C' points to a column arrow in the 'What Accounting software are you experienced in?' column. A red box labeled 'D' points to the 'Attachments' icon in the top right corner.

To view details of a particular applicant, simply click on his last name to pull up his Applicant Page.

Applicant Page

The Applicant page contains all information that TAM has on an applicant on a single page. You can view an applicant's name, email address, phone number, resume, Application of Employment, and attachments here. You can also communicate with the applicant by scheduling interviews and sending emails from this page. Correspondences sent are tracked under 'Email History'. In addition, you can upload the applicant's documents and share the applicant's resume/attachments with another manager. Basically, any information pertaining to the applicant resides on his Applicant Page, making data access extremely simple and convenient.

Let's take a look at the Applicant Page...

A

B

C








D


E

Click here to upload attachments

The screenshot shows the Applicant Page for Carlos Melendez. At the top, there is a navigation bar with links for Resume, Cover Letter, Prescreening Questions, and Carlos Interview Questions 11.13. Below this, there is a section for 'Application of Employment' and 'People Clues Assessment'. The main content area displays the applicant's information, including name, address, phone number, and email. There is a 'Status' dropdown menu set to 'Manager review'. Below this, there is a 'Notes History' section with a list of notes and dates. At the bottom, there is a 'Tags' section with a list of tags and a 'Source' dropdown menu. A red box labeled 'E' points to the 'Attachments' icon in the top right corner.

A) Available Actions – simply click on the icon:




-  Allows you to edit the applicant's personal information (name, address, etc.) as well as their prescreening questions (may not be available to hiring managers).
-  Enter Notes. Enter comments/notes pertaining to applicants, including your impression, notes from phone screens or interviews, and helpful notes for recruiters and other managers to assist in choosing the best applicant. You are highly encouraged to use the Notes feature as it makes communication between all TAM users much easier. Anyone having access to this applicant can easily check any notes from HR, the recruiter, senior management, hiring manager or even an interviewer.
TIP: Once you leave the Enter Notes box, comments will automatically move to the Notes History. Your name and the date will automatically be added to your comments. You will no longer be able to edit your comments. If you need to modify your notes, you will need to contact your administrator.
-  Applicant Summary. Quick view of applicant info, resume, Application of Employment. This is helpful for quick data access during interviews.
-  Schedule appointment. If you have linked your calendar to TAM, you may schedule your interview with the applicant.
-  Share with another TAM user. An email with the applicant's link will display for you to send to another TAM user.
-  Email resume/attachments outside TAM. An email with attachments will display for you to send out. Make sure you scroll to the bottom of the email to ensure that you are sending the correct attachments.
-  Send online Application of Employment (if enabled by your administrator). An email will be sent to the applicant requesting that he completes the Application of Employment. Once he submits the completed application, you will be notified via email.

TIP: A green flag  next the Application of Employment icon indicates that the applicant has completed the application. A grey flag indicates 'In Progress'. No flag means the process has not been started yet.

B) Applicant's contact information.




- You can click up to 5 stars to rate the applicant's qualification. This rating is subjective and is for your own use and reference.
- To email the applicant, you can simply click on the email address.

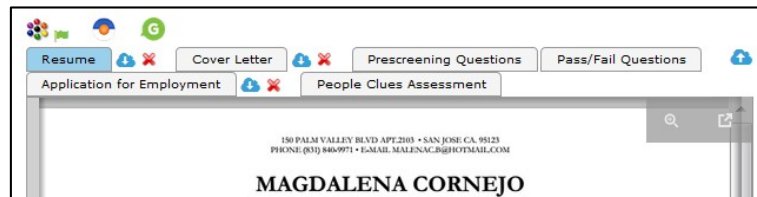
C) Status – shows the step that the applicant is at in the interview process.

- To move the applicant to another step, just select that step. To pass the applicant at their current step and move to the next applicant, click on the Pass button . To reject the applicant, click on . To reject the applicant and add a reason for rejection, click on . A pull-down will display for you to select your reject reasons.
- You can also access details if the applicant has applied for another position within the company.

D) History Box displays the following:

- Notes History
- Email History – any email sent from the Applicant Page will be tracked here.
- Status History – tracks when (and by whom) the candidate was moved to the next hiring step.
- Tags. These can be any description word you like and can be used to later search for applicant with certain attributes. Click *edit* if you want a pull-down of possible tags or type in your own on the first line.
- Source. Pull-down of where applicant may have heard of the open position.
- Referred by. Name of individual who referred applicant.
- Assigned to. May be assigned to the Recruiter or the Hiring Manager.
- Move to Position. If the applicant is a better fit for another position, an administrator or recruiter can move him via this field. (This feature is not available to you as a manager).

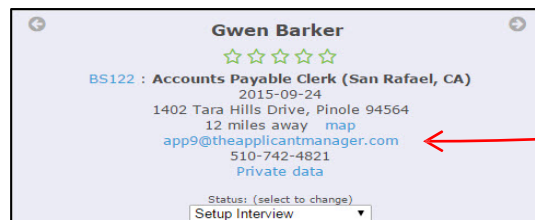
- E) Any integration with TAM partners which your company is using will display here (personality assessments, skill assessments, reference checks, background checks, etc.). Click the icon to begin the process. A green flag  indicates completion while a grey flag shows an assessment/check is in progress.
- F) Attachment tabs – Resume, cover letter, prescreening answers, assessments, and any other available documents pertaining to the applicant. To upload and attach additional documents, click on the  icon. You can also download and delete documents. Simply click on the appropriate icons (visible when you're in edit mode ).



Using Email

Tracking communication with applicants is easy if you send your email via TAM. You can send an email to one candidate or several candidates at a time. With mass email, TAM will send each email out individually so that notes are still personalized from you. In addition, TAM lets you create templates for faster, time-saving emails.

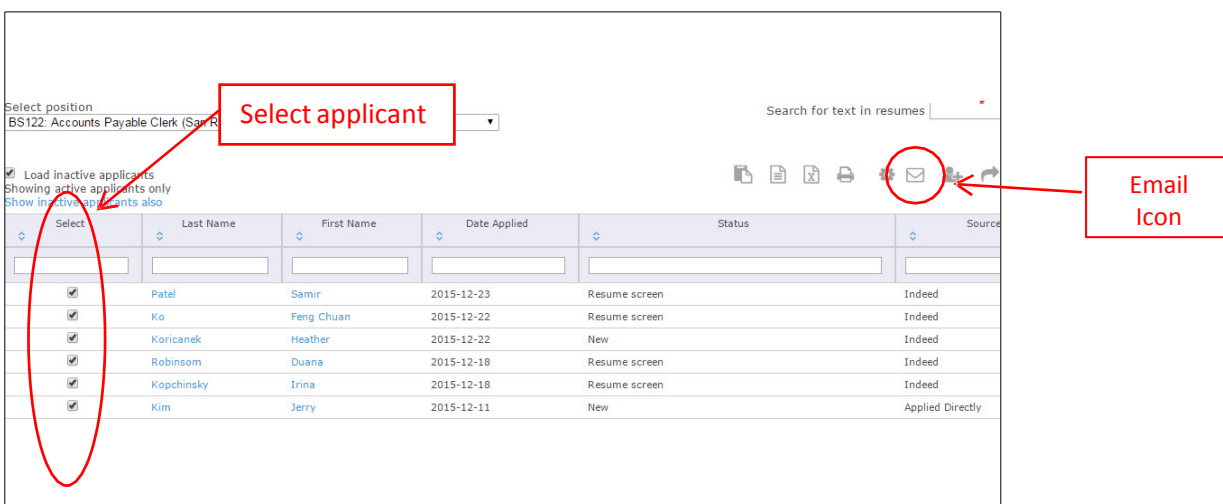
Sending an Email



Sending Mass Email

To send email to several applicants at once, select the applicants from the Applicant Table, then click on the email icon at the top of the table.

TIP: If the Select (check box) column does not appear on your Applicant Table, update your settings (see Applicant Table Settings) by clicking on the gear icon and checking 'Select'.



You'll see that the email will contain all email addresses. However, TAM will send one email out at a time so that recipients do not know that they were mass emailed. In order to personalize the emails (ie. "Hi John" instead of "Hi Applicant",) be sure to use tokens when creating your templates (see Email Templates).

Email Templates

The purpose of email templates is to allow you to create an email that you can use over and over again. To create a template:

1. Select *Admin/Email* from the top bar menu or the email icon on the applicant page.
2. Click *Create/Edit* a template. You can start fresh or choose a template to edit and save as your own.
3. Complete the *Subject and Message* portions of the email.
4. Enter a new name
5. Hit *Save* when complete.

Templates become much more useful when you use tokens. Let's say I wanted to create a *"Thanks for Applying"* message. I could make the message something like: "Dear applicant, thank you for applying for an open position at our company." But using tokens allows me to create this: "Dear {applicant_first_name}, thank you for applying for the position of {position} at {company_name}." So if I was on the Edit Applicant page looking at applicant John Doe, and I wanted to send him this email, I'd click on his email address, then on the email page, select the template I created, and TAM would then replace {applicant_first_name} with John and {position} with the position John applied for. The result is a more personalized email: "Dear John, thank you for applying for the position of Manager at XYZ Company."

This allows using the same email template for any applicant without having to type in their name.

TIP: You can view and use anyone's templates and they can view/use yours. However, only the owner of the template may edit or delete his template. If you want to edit someone else's template, you can do a Save As, thereby creating your own copy.

Searches

TAM has a fully searchable database and provides several ways of searching data.

Quick search - by applicant name, email or phone#

Enter firstname, lastname, or partial name in the field at the top menu bar. You may use wildcards. You may also enter an email address or phone #.



Advanced Search

Under *Talent Pool* at the top bar menu, choose *Search*. You may search through applicants, non-applicants, or inactive/archived applicants. There are multiple filters with which to narrow down your searches. You will be limited to searching for applicants in positions assigned to you. You can also search all non-applicants.

Filter Search

On the Applicant Table (click *Applicant* under *Talent Pool* at the top bar menu), pull up your list of applicants. You can enter your search value in the field within a column. Enter the first couple of letters/number in the column field. TAM will automatically find the values matching your search.

Keyword Search

On the Applicant Table (click *Applicant* under *Talent Pool* at the top bar menu), you can search for keywords in the text of resumes. For example, if you need applicants with Excel experience, entering 'Excel' or wildcard 'Exc*' value will pull up candidates with Excel in their resume. This search will only search the applicants displayed in the Table.

Troubleshoot

We've listed common troubleshoot issues users have encountered over the years. If you don't find your answer here, please contact support@theapplicantmanager.com.

Do I need a certain type of computing platform or browser to use TAM?

No, you can run TAM on virtually any device which has access to the web. TAM is completely cloud-based software and we verify each new release on all modern browsers. So you can run TAM on a PC, a Mac, a tablet or a smart phone, and you can use Chrome, Firefox, Internet Explorer, Safari or Opera as your browser, although we recommend Chrome for the fastest and most efficient use of TAM.

I forgot my password; can you reset it for me?

Sorry, your password is encrypted and even we can't see it. We do this for security reasons to protect your password. But you can easily reset it yourself. Just click on "Forgot your password?" on the login panel and TAM will send a new password to your email address. You can then change your password after you log back in. You can also request that your TAM administrator look up the password email in their email table and send you a copy.

On the Applicant page I cannot see the resume; it's just a blank space

TAM currently provides three different viewing choices that you can choose from: Google Docs, TAM docs, and HTML views. Occasionally, when using Google Docs or TAM docs, the image of the document will not be displayed and you'll just see a blank page. When that happens you can either reload the page (using the browser refresh) or just switch to another view.

I have a resume from a friend/colleague/etc., can I enter or upload it into TAM?

As a hiring manager you may not have the ability to upload resumes. You can have your administrator do this for you, or just ask your administrator to grant you access to the upload resume feature.