

# Enterprise - How to Create and Manage the Candidate Worksheet

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[Complimentary Webinar - Candidate Worksheet](#) from TempWorks Training on Vimeo.

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## What is a Candidate Worksheet?

The Order record's candidate worksheet is used to track any Employees who are being considered for a position. Within this area, you can preview resumes, send emails, track statuses, and log Candidate information without ever leaving the Order record.

## Quick Steps:

### Add an Employee to the Candidates Worksheet for an Order:

1. Under the order you wish to add candidates to, select Candidates > Search
2. Find Employees you wish to add to the Candidates list
3. From search results, right click employee(s) and select 'Make Employee a Candidate'  
OR From the employee record, go to the actions menu and select 'Set as Candidate For ...'

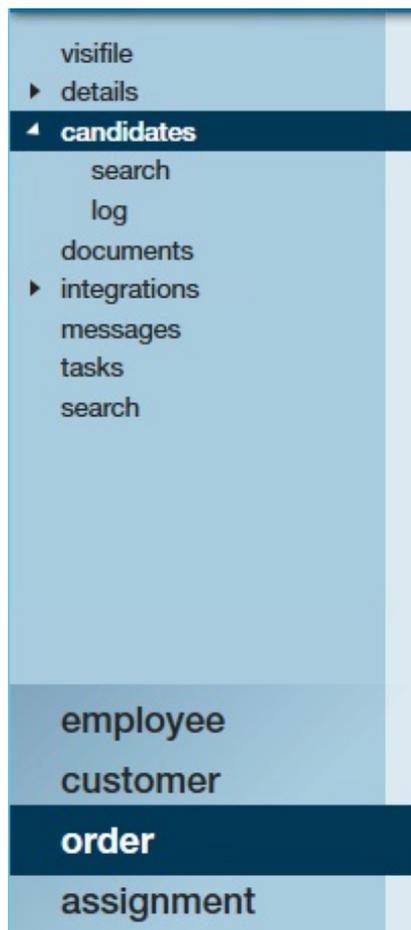
### Manage the Candidates Worksheet for an Order:

1. Navigate to the order you wish to see the candidate list for

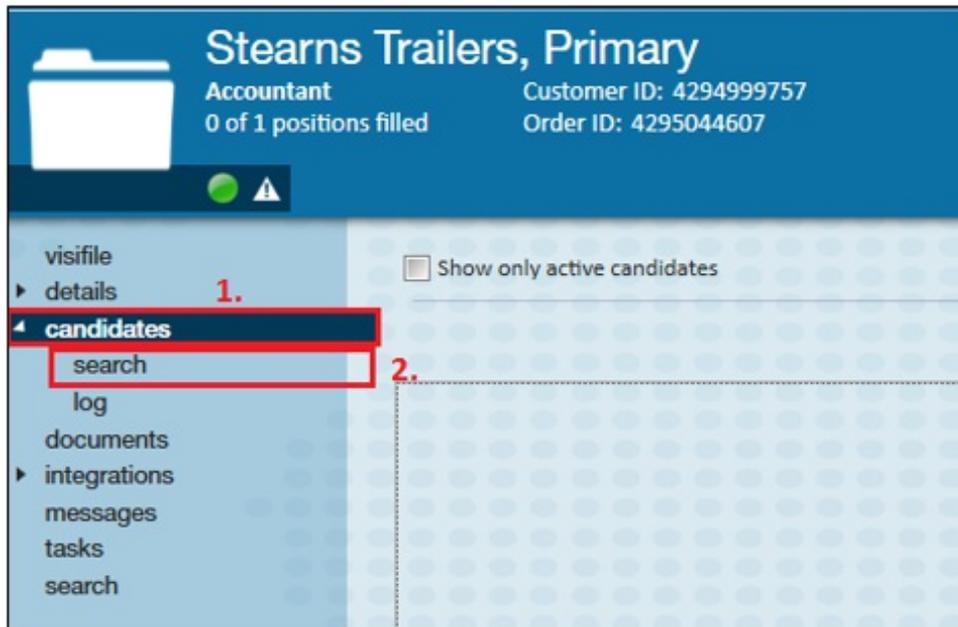
2. Select 'candidates' on the left
3. A list of employees that you have added as a candidate will be show. Right click an employee to change the status, edit, remove, or assign employee.

## Complete and Detailed Steps:

### Adding Employees to the Candidate Worksheet

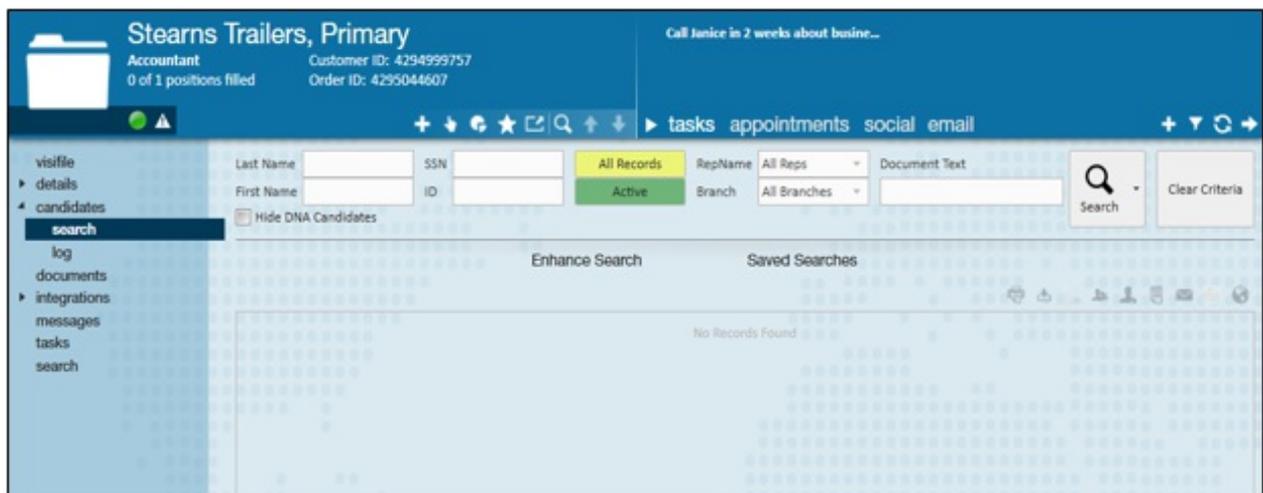


Navigate to the Order you wish to add Candidates to and select Candidates (1.). After expanding the Candidates section select Search (2.) to find Employees who fit the criteria needed to fill the Order.



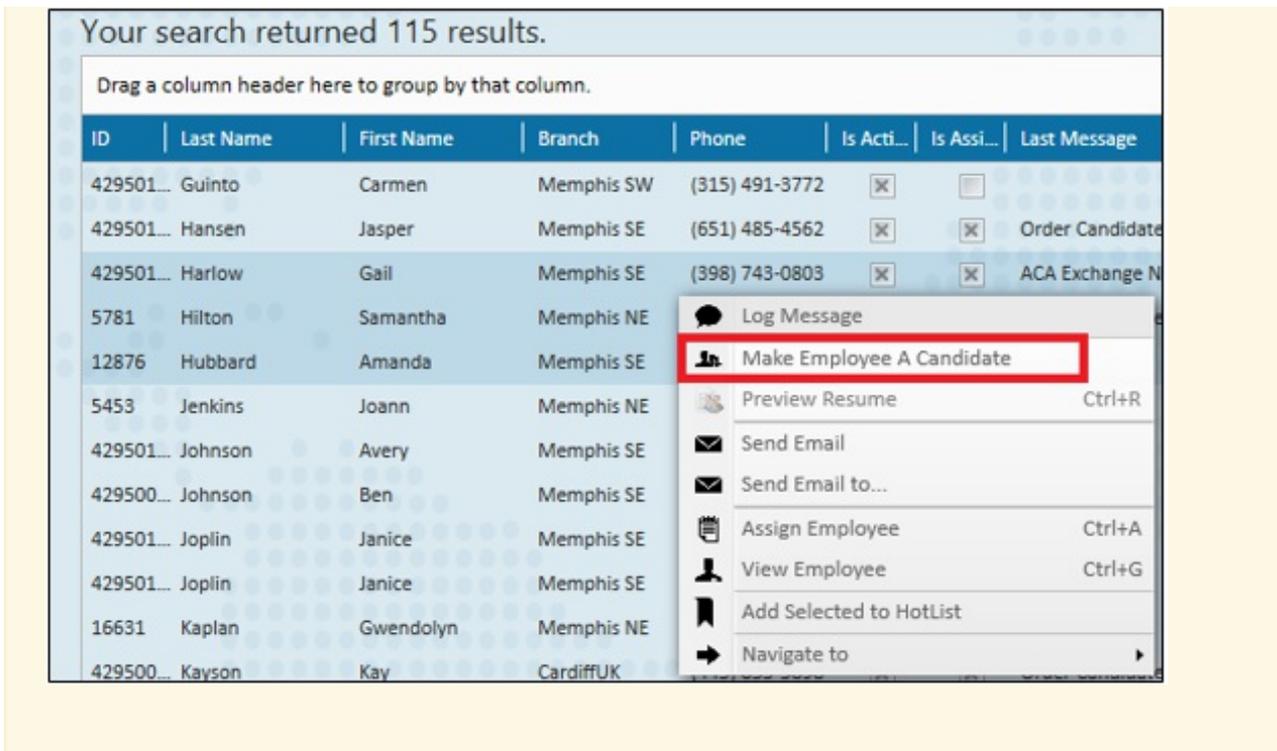
Utilize the search section to enter an Employee's first and last name, or Social Security Number. Expand the enhance search area to narrow in on Employees with specific interest codes and other items the client has requested.

**\*Note\*** For more information on the enhanced searched area, please see the article entitled 'Searching'.



Once the search results are returned, select the Employee(s) you would like to add to the Candidate worksheet. Right-click on the Employee(s) and select Make Employee a candidate.

**\*Note\*** Multiple Employees may be highlighted at once by holding the Shift, or Ctrl key while making a selection.

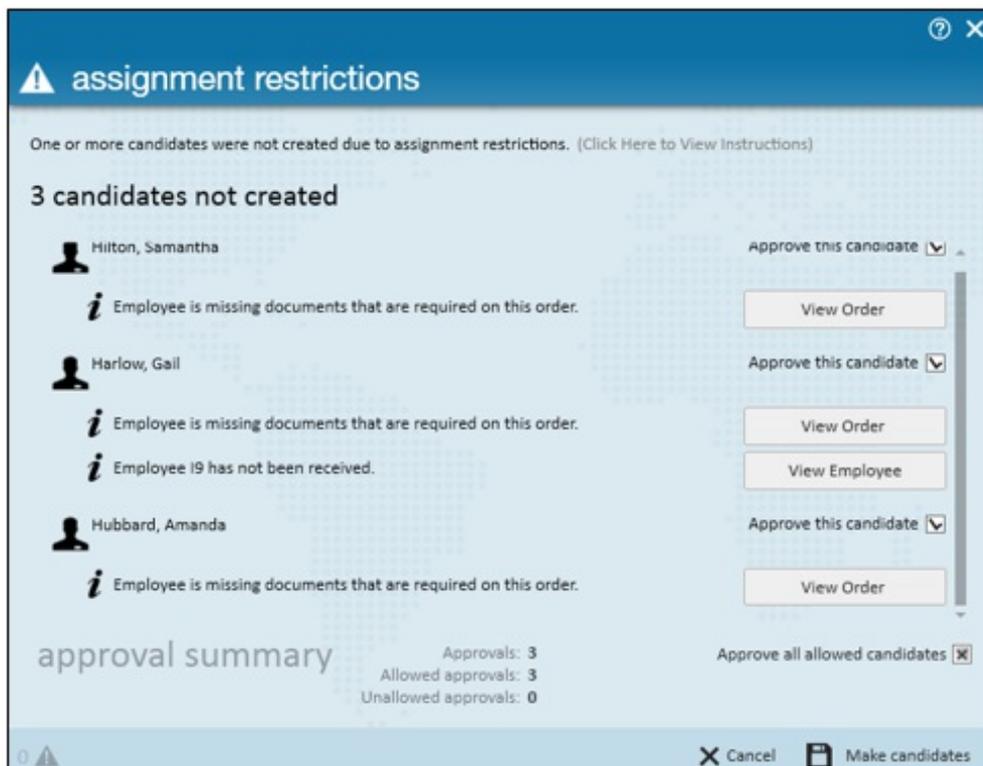


Assignment Restrictions may display when attempting to create Candidates on an Order.

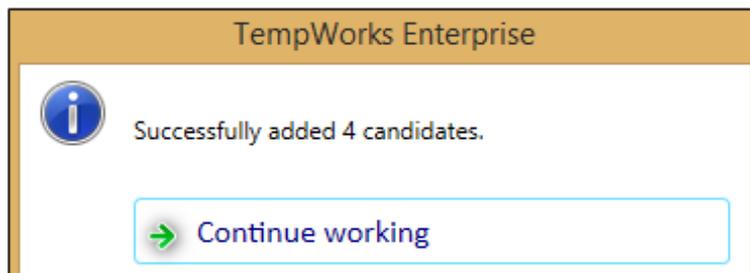
These restrictions will warn you *if* any information needs attention, or needs to be fixed.

Restrictions can include a hard stop indicated by a  symbol. This will not allow you to consider this candidate until items on their record are fixed.

The  symbol represents a soft stop, allowing you to continue after you acknowledge the Restriction. Once you have reviewed the Restrictions, select the Approve all allowed Candidates box and click Make Candidates to save.



If you have correctly added the Candidates to the Order, the following window will appear:

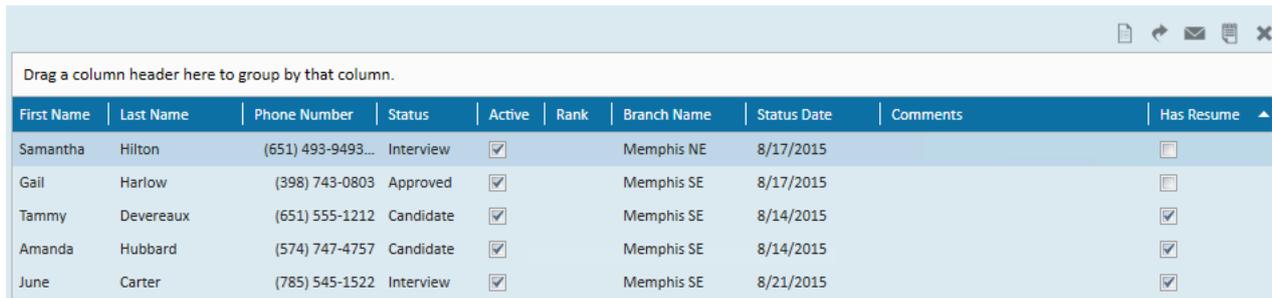


**\*Note\*** Adding a Candidate to the Order will log a message to the respective Order, Customer, Employee, and Contact records. Any changes to the Status of the Candidate in the worksheet will also automatically log a Message to all records.

Date	Action	Message	Rep	Contact	Due	Employee
8/14/2015	Order Candidate	Candidate -- Stearns Trailers Comments:	lindsey.schneider	Notch, Diane (Stearns Tr...		Hubbard, Amanda
8/14/2015	Order Candidate	Candidate -- Stearns Trailers Comments:	lindsey.schneider	Notch, Diane (Stearns Tr...		Harlow, Gail
8/14/2015	Order Candidate	Candidate -- Stearns Trailers Comments:	lindsey.schneider	Notch, Diane (Stearns Tr...		Hilton, Samantha
8/14/2015	Order Candidate	Candidate -- Stearns Trailers Comments:	lindsey.schneider	Notch, Diane (Stearns Tr...		Devereaux, Tammy

Employees who have been attached as Candidates will be now be displayed in the Candidate worksheet (Under the order record > Candidates section) where you may

preview the following details:



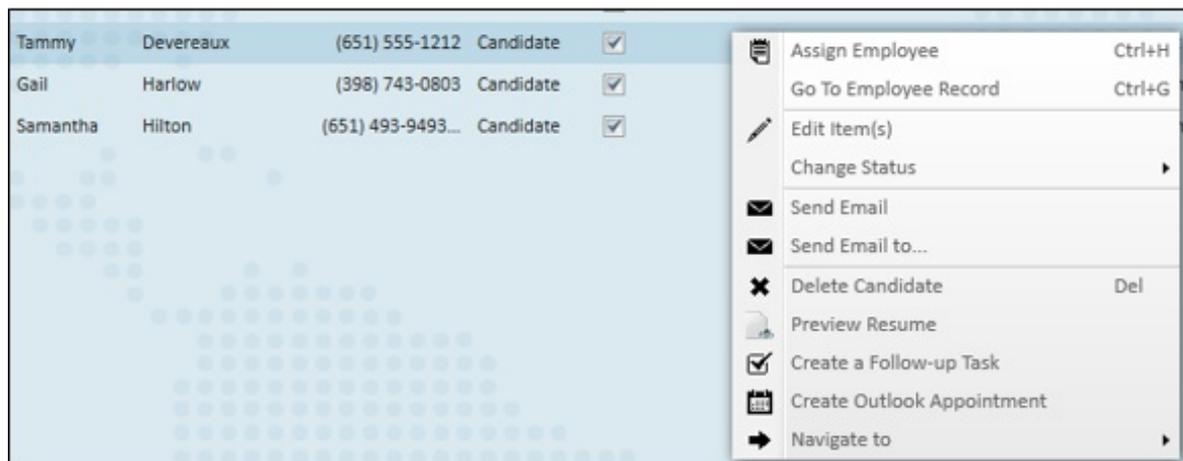
First Name	Last Name	Phone Number	Status	Active	Rank	Branch Name	Status Date	Comments	Has Resume
Samantha	Hilton	(651) 493-9493...	Interview	<input checked="" type="checkbox"/>		Memphis NE	8/17/2015		<input type="checkbox"/>
Gail	Harlow	(398) 743-0803	Approved	<input checked="" type="checkbox"/>		Memphis SE	8/17/2015		<input type="checkbox"/>
Tammy	Devereaux	(651) 555-1212	Candidate	<input checked="" type="checkbox"/>		Memphis SE	8/14/2015		<input checked="" type="checkbox"/>
Amanda	Hubbard	(574) 747-4757	Candidate	<input checked="" type="checkbox"/>		Memphis SE	8/14/2015		<input checked="" type="checkbox"/>
June	Carter	(785) 545-1522	Interview	<input checked="" type="checkbox"/>		Memphis SE	8/21/2015		<input checked="" type="checkbox"/>

- **Phone Number:** Displays the Contact Method type of “Phone” from the Employee record.
- **Status:** Indicates how far along in the hiring process a candidate is. Specific statuses such as “Refused” or “Rejected” will remove the Employee as an active candidate on the Order. If the Employee is submitted via the Job Board or a Vendor a status of “WCandidate” or “VCandidate” will appear.
- **Active:** Indicates that the Employee is an “Active” Candidate on the Order, this does NOT refer to their Employee record being “Active.”
- **Status Date:** Refers to the last day that the Employee’s status was updated on the Order.
- **Company:** The Company column reflects the staffing company the Employee is associated with.
- **Comments:** Utilize the comments section to track notes and information pertaining to the individual as a Candidate to the Order.
- **Rank:** A numerical rating can be edited within the Rank section to signify how likely they are to being considered or assigned to the Order.

**\*Note\*** You can add additional fields or remove fields you do not wish to see by right clicking any of the column headers. Additional fields include Submitted By and Submitted Origin which allow you to track who has added an employee to the candidate worksheet.

## Managing the Worksheet:

Right clicking on any Candidate(s) listed to manage the candidate worksheet:



- **Assign Employee:** Assigns the Employee to the Order.
- **Go to Employee Record:** Select this option to navigate to the Employee record you are highlighted on.
- **Edit Items:** Opens the Candidate window where you may place Comments and Rank the Employee.
- **Change Status:** Allows you to change the Candidate(s) status based upon the scenario for the Candidate(s). Did they refuse a position, will there be an interview, were they declined a position due to certain circumstances?
- **Send Email/Send Email to:** Utilize these options to communicate via email/text to Candidates.
- **Delete Candidate:** Remove the Candidate(s) from the list
- **Preview Resume:** Provided the Employee has a Resume on file, clicking this option will display it.
- **Create a Follow-up Task:** Schedule a task to follow-up with the Candidate(s).
- **Create Outlook Appointment:** Allows you to schedule an Outlook Appointment for the Candidate(s).
- **Navigate to:** Select this option to navigate back to certain forms within the Employee record of that Candidate.

Logs will also display within the Order to track each time a Candidate Status is changed.

<ul style="list-style-type: none"> <li>visifile</li> <li>▶ details</li> <li>◀ candidates</li> <li>  search</li> <li><b>log</b></li> <li>  documents</li> <li>▶ integrations</li> <li>  messages</li> <li>  tasks</li> <li>  search</li> </ul>	Drag a column header here to group by that column.			
	Entry Date	Employee	Customer	Status
	8/17/2015 4:24 PM	Hilton, Samantha	Stearns Trailers	Interview
	8/17/2015 4:24 PM	Harlow, Gail	Stearns Trailers	Approved
	8/14/2015 5:03 PM	Hubbard, Amanda	Stearns Trailers	Candidate
	8/14/2015 5:03 PM	Harlow, Gail	Stearns Trailers	Candidate
	8/14/2015 5:01 PM	Devereaux, Tammy	Stearns Trailers	Candidate

The Candidacy area of an Employee record provides a historical list of any Orders they have been considered for. Navigate to an Employee record (1.), select Details (2.), Candidacy section (3.) to preview the status they held while be considered for the Order.



**Samantha Hilton**

256 Royal Highway ID: 5781  
Eagan, MN 55121 SSN: xxx-xx-5559

1.

visifile
+

◀ details

2.

candidacy

3.

Drag a column header here to group by that column.			
Customer	Order	Status	Date
Crom Equipment	4365	Candidate	4/20/2009
Dans Cleaning Services	5546	Refused	12/8/2008
Yeti's Lab	4295012577	Rejected	5/22/2014
Paperless Wonders Inc	4295023069	Placed	9/18/2014
Best Buy	4295033894	Candidate	3/2/2015
Stearns Trailers	4295044607	Interview	8/17/2015

*Other approaches for adding Candidates to an Order are included below:*

**From Employee Search Results:**

After viewing the Order, navigate to the Employee search section.

Large number of results returned - showing first 1000.

Drag a column header here to group by that column.

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Phone
16408	1099 Test 12	Jeff1	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	React			
429501...	38	AET	Memphis SE	(612) 555-4789	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	56001	<input type="checkbox"/>	
429497...	5sdasfd	5sdasfd	Memphis NW		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Refused		<input type="checkbox"/>	
429500...	Aasen	Andrew	Memphis NE	(867) 486-3547	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DNA	32908	<input checked="" type="checkbox"/>	(687) 463-5413
429501...	Aasen	Robert	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	DNA		<input type="checkbox"/>	(651) 287-4824
5412	Abbott	sam	Memphis CA	(651) 845-4845	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	55121	<input checked="" type="checkbox"/>	(651) 636-0636 x123
429497...	Abinteh	Mary	Memphis SE	(321) 456-8080	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	55121	<input checked="" type="checkbox"/>	
5021	Abootorabi	Deborah	Memphis NE	(651) 574-15...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Refused	45203	<input type="checkbox"/>	(651) 813-1813 x123
13142	Abotina	Susie	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	DNA	55123	<input checked="" type="checkbox"/>	
5022	Abron	Jill	Memphis NE	(651) 232-82...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input checked="" type="checkbox"/>	(651) 890-9890 x123
429497...	Accrue	Jackie	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Refused	55121	<input type="checkbox"/>	
429497...	Accrue	James	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input type="checkbox"/>	
5023	Acosta	Davis	Memphis SE	(651) 233-82...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	React	55121	<input checked="" type="checkbox"/>	
429501...	Acosta	Davis	Memphis SE	(315) 222-3343	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed		<input checked="" type="checkbox"/>	
429501...	Adam	Froehlich	Memphis SW	(651) 555-4782	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Placed	55121	<input checked="" type="checkbox"/>	
429501...	Adams	Dianna	Memphis SE	(763) 222-4339	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	55107	<input checked="" type="checkbox"/>	(485) 488-5555
429497...	Adams	Molly	Memphis SE	(858) 555-1002	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email	92075-	<input type="checkbox"/>	
429497...	Adams4	Molly4	Memphis SE	(858) 555-1002	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	92075-	<input type="checkbox"/>	
429501...	Aho	Amy	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
5028	Alaska	Joe	Memphis CA	(651) 225-55...	<input type="checkbox"/>	<input type="checkbox"/>	Reactivate	P6Q1K8	<input checked="" type="checkbox"/>	
16438	Alaska	Joe	Memphis SE	(612) 555-0919	<input checked="" type="checkbox"/>	<input type="checkbox"/>	2nd Interview w/...	45056	<input checked="" type="checkbox"/>	(612) 555-1234
429501...	Aida	Alan	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input type="checkbox"/>	
429501...	alex	rodriguez	Memphis SW	(941) 739-8883	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Available	34203	<input type="checkbox"/>	(941) 739-8883

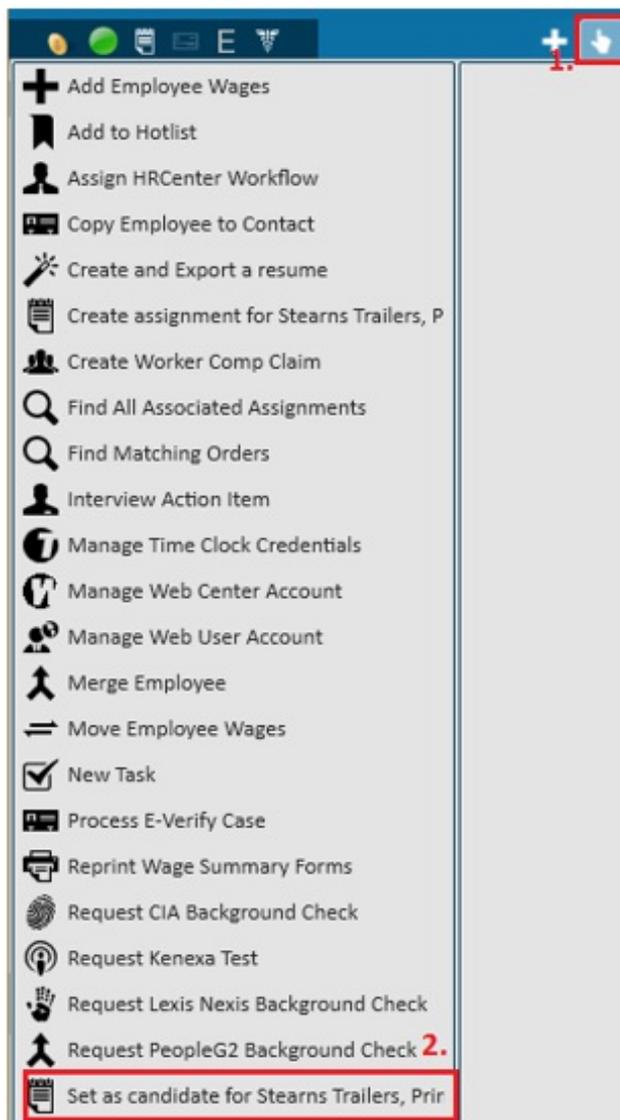
Enter the necessary searching criteria and select the Employee(s) you wish to add as a Candidate (1.); once selected, right click and select the "Set as Order Candidate" option (2.).

Drag a column header here to group by that column.

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Phone
429501...	Beach	Sandy	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
5414	Beach	Tracy	Memphis NE	(651) 230-82...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input type="checkbox"/>	(651) 494-0494 x123
429498...	Beadle	Fred	Memphis SE	(773) 555-1212	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	37501	<input type="checkbox"/>	(763) 555-2478
429501...	Bean	Broad	Memphis NW	(714) 456-4567	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	92504	<input checked="" type="checkbox"/>	
429496...	Bean	Jim	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email	55121	<input type="checkbox"/>	
429496...	Bean	Jim	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...		<input type="checkbox"/>	
429501...	Beard	Sara	Memphis SE	(651) 458-4312	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input type="checkbox"/>	
16614	Beard	Yosef	Memphis NE	(651) 239-5847	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Order Candidate	55121	<input type="checkbox"/>	
429496...	Beard	Marjorie	Memphis NE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	55344	<input checked="" type="checkbox"/>	
429500...	Beaudry	Kelli	Memphis SE	(161) 691-6516	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Placed	60661	<input type="checkbox"/>	
12698	Beck	Steve	Memphis SE	(651) 555-0919	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate		<input type="checkbox"/>	
12648	Becker	Polly	Memphis SE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate	55416	<input type="checkbox"/>	(952) 417-0632
5052	Becket	Sam	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Placed	55068	<input type="checkbox"/>	
429501...	Becket	Sam	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>		55068	<input type="checkbox"/>	
15841	Bedillion	William	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	ACA Exchange No...	55123	<input type="checkbox"/>	
429500...	Behrend	Judy	Memphis SE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...	55423	<input type="checkbox"/>	
429497...	Beiswenger	Versie	Memphis SE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Order Candidate		<input type="checkbox"/>	
429497...	Believe	Bravery	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>		65435	<input type="checkbox"/>	(654) 351-3216
429501...	Bell	Aaron	Memphis NE		<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
429501...	Bell	Aaron	Memphis NE	(810) 610-0703	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ACA Exchange No...	48114	<input type="checkbox"/>	
429501...	Bell	Bernie	Memphis NW	(654) 654-6546	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message	55122	<input type="checkbox"/>	
429501...	Bell	Janice	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	
429500...	Bell	Judith	Memphis SE	(987) 974-3211	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	ACA Exchange No...	56001	<input type="checkbox"/>	(963) 452-3696

**From an Employee Record:**

After viewing the Order, navigate to the individual employee record. Click the (1.) Actions menu and select the (2.) "Set as Candidate for" option to add them to the Candidate worksheet.



## Related Articles

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