



# Interviews

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## Inviting Candidates to Interview

1. Now that you have your final shortlist, you will be able to use the system to invite the candidates.
2. First, think about the schedule. Will candidates be asked to undertake a test or give a presentation? Will they have any additional interviews or meetings with other members of the department? It is worth noting a schedule which sets out the slots needed for each person.
3. Adding some slippage time, either at the end of the schedule or in between candidates, will help the panel keep to time, or allow candidates to get from 'A' to 'B' if they need to move locations during activities.
4. Next, think about logistics. Where will candidates report to? Who will greet them when they arrive? Will you need to arrange any catering for the panel members or candidates?

## Using Engage ATS to invite candidates to interview

1. The first step is to create the interview schedule in the system.
2. Log-in to the system and click the '**Interviews**' tab at the top of the screen.

The screenshot shows the Engage ATS interface. At the top, there is a navigation bar with tabs: Home, Panel Home, My Settings, Vacancies, Approval Request, **Interviews** (highlighted with a red box), and FAQs. Below the navigation bar, there are two main sections.

The first section is titled "Number of Applications by Vacancy". It contains filters for "Vacancy Live Status" (All), "Vacancy Status" (All), and "Vacancy Title". Below the filters is a table with the following data:

Vacancy Name	Live status	Status
Administrator	Live	Offer
Manager	Not Live	Filled

Below the table, there are navigation controls (back, previous, 1, next, forward) and a "Page size: 10" dropdown.

The second section is titled "Candidates per Application Stage". It contains filters for "Vacancy Live Status" (All) and a "Search" button. To the right of this section, there is a "Search" button and a "Change" button.

3. You have the option to create a schedule with participants (panel members) or without. Creating a schedule with participants will mean that the panel members will also be asked to confirm that they will attend the interview once the candidates are invited. It is likely that you will already have the panel members' confirmation that they will attend outside of the system and so you can create the schedule '**without participants**'.
4. Once you have created the interview schedule, it is worth ensuring that panel members are informed where and when the interviews will take place, as well as the names of the candidates and their interview slots.
5. In this example, we will create a schedule without asking panel members to confirm their availability for the interviews.

6. Click 'Create a schedule without participants'.

Schedules							
Create schedule with participants		Create schedule without participants		Create schedule for an event			
Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
Test	14/1	14/1	Published to Candidates	1	0		
HR Manager, Information and Systems	12/1	12/1	Closed	3	1		
DB Admin Interviews	20/1	20/1	Finalised	2	2		

7. The 'Scheduling Wizard' will open, showing you a step-by-step guide on creating a schedule for interviews. Click the purple 'continue' button in the bottom right of the screen

Home

Panel Home

My Settings

Vacancies

Approval Request

Interviews

FAQs

Schedule Overview

What stages are involved in creating and editing a schedule

Step 1: Schedule Details

Give the schedule a name and select which application stage you would like to create the schedule for. You also have the option to make the schedule vacancy specific by selecting one or more vacancies on this page.

Step 2: Create Slots

Enter the dates, times, duration and locations of the slots on the schedule. To create slots with different durations or locations, or non-concurrent slots, you will need to select the Create New Slots button more than once. You can create as many new slots within one schedule as needed.

Step 3: Review Slots

Review what slots have been created, who has signed up and make changes.

Step 4: Select Email Templates

Select the email templates that will be used when communicating with participants and candidates. Additionally, reminder emails can be selected that will be used if candidates or participants haven't entered their availability in a timeframe you decide. Certain emails can be sent as meeting requests, in which case, the recipient will be able to add the appointment directly to their calendar.

Step 5: Publish to Candidates

By clicking the Publish Schedule button on this page you can send an email to candidates to notify them that there are available slots for them to book themselves into. If you are creating a schedule with participants you will not be able to publish the schedule to candidates until participants have confirmed the slots that they are available for.

If more candidates become available and you would like to invite them to select a slot, you need to select the Publish Additional Slots to Candidates button.

You can also see a list of the candidates already on the schedule and details of their appointments. You can also cancel an appointment and, via a link to candidate search, accept the schedule on behalf of the candidate.

Step 6: Finalise Schedule

After participants and candidates have confirmed their appointments the schedule can be finalised. By clicking the Finalise Schedule button on this page an appointment confirmation email is sent to all participants and candidates with details of the appointment.

Step 7: Email Correspondence

Take a look at all the correspondence sent regarding this schedule.

Continue

8. The '**Schedule Details**' screen will appear. Give the Schedule a name in the '**Schedule Name**' field. This is usually the job title of the vacancy. You can also enter the job title in the '**Description**' field.

The screenshot shows the 'Schedule Details' form. The title 'Schedule Details' is highlighted with a red box. The form includes fields for 'Schedule Name', 'Description', 'Application stage' (a dropdown menu with 'Please select' chosen), 'Add Vacancy(s)', and 'This schedule is'. Below these fields, it says 'Candidates at application stage' with '0 candidates' in red. A 'Save and Continue' button is at the bottom right.

9. Select the '**Application Stage**' from the options in the drop-down list. If this is the first interview or the only interview in the process, select '**Invite to Interview**' at the bottom of the list.

This screenshot shows the 'Schedule Details' form after some input. The 'Schedule Name' and 'Description' fields both contain the word 'Administrator'. The 'Application stage' dropdown menu is highlighted with a red box and shows 'Invite to interview' selected. Below the form, it says 'Candidates at application stage' with '4 candidates' in red.

10. Click the **'Add vacancy'** link on the left side of the screen.

Home | Panel Home | My Settings | Vacancies | Approval Request | Interviews | FAQs

## Schedule Details

Set the schedule name and the criteria that will be used to select candidates

Schedule Name: Administrator

Description: Administrator

Application stage: Invite to interview

**Add Vacancy(s)**

This schedule is

Candidates at application stage: 4 candidates

11. The **'Search Vacancies'** window will appear. Start typing the job title in the **'vacancy field'** and click the **'search'** icon.

**Search Vacancies**

/vacancy

adm

Show More Search Options

Vacancy	
Administrator	<input type="checkbox"/>

OK Cancel

12. The vacancies that match the job title will appear on the right side of the screen. In this example, there is one vacancy which has been found. Check the box next to the vacancy and click the purple 'OK' button on the bottom right of the screen.

**Search Vacancies**

Vacancy

adm

Show More Search Options

Vacancy	
Administrator	<input checked="" type="checkbox"/>

OK Cancel

13. The 'Schedule Details' screen will appear and you will see that there are 3 candidates at this application stage.

Home Panel Home My Settings Vacancies Approval Request Interviews FAQs

**Schedule Details** Set the schedule name and the criteria that will be used to select candidates

Schedule Name Administrator

Description Administrator

Application stage Invite to interview

Add Vacancy(s) Administrator

This schedule is

Candidates at application stage 3 candidates

**TIP:** If the system shows '0 candidates' return to your vacancy and check that the candidates are at the 'Invite to Interview' stage.

14. Click the purple **'Save and Continue'** button at the bottom right of the screen.



15. The **'Create New Slots'** screen will appear. Using the 24-hour clock format enter the start time and the end time of your interview schedule in the **'From'** and **'To'** fields.

Home Panel Home My Settings Vacancies Approval Request Interviews FAQs

### Create New Slots

Create interview slots on multiple days at a time, specify dates and times and durations.

Select the dates that you would like to create interview slots for. You can create slots on multiple days at a time. Then select the start and end times of the interview slots occurring on each day. Select how many slots will occur in that time range and how long each slot will be. Specify if any gaps will occur between the interview slots, as well as the location of the interviews.

From

To

Total number of Slots required

Slot duration

1 Hour

Time between slots

None

Location

Show all locations

Please select

Dates

January 2016

	M	T	W	T	F	S	S
1	28	29	30	31	1	2	3
2	4	5	6	7	8	9	10
3	11	12	13	14	15	16	17
4	18	19	20	21	22	23	24
5	25	26	27	28	29	30	31
6	1	2	3	4	5	6	7

Add Interview Slots

Previous Next

16. Insert the **number of slots** you require. In this example, there are 3 slots because there are 3 candidates.

17. You can also insert the amount of time that you would like to have in between slots to allow for slippage etc.

Create interview slots on multiple days at a time, specify dates and times and durations.

### Create New Slots

Select the dates that you would like to create interview slots for. You can create slots on multiple days at a time. Then select the start and end times of the interview slots occurring on each day. Select how many slots will occur in that time range and how long each slot will be. Specify if any gaps will occur between the interview slots, as well as the location of the interviews.

From

10:00

To

13:15

Total number of Slots required

3

Slot duration

1 Hour

Time between slots

5 Minutes

Location

Show only related locations

LSE

Dates

January 2016

	M	T	W	T	F	S	S
1	28	29	30	31	1	2	3
2	4	5	6	7	8	9	10
3	11	12	13	14	15	16	17
4	18	19	20	21	22	23	24
5	25	26	27	28	29	30	31
6	1	2	3	4	5	6	7

Add Interview Slots

Previous Next





**TIP:** If you would like to include time in between slots, please ensure that the time between the start and end is long enough. In this example, to have 5 minutes between each interview slot you would need to start the slot at 10:00 and end it at 13:15 to allow a one-hour slot per candidate and a 5-minute gap in between each one. See the screenshot below for an example:

18. Click on the red **'Show all locations'** link and select **'LSE'** from the drop down. You will be able to add the specific location of the interview and the place to which candidates should report to when you prepare the invite email.

## Create New Slots

Select the dates that you would like to create interview slots for. You can create slots on multiple days at a time. Then select the start and end times of the interview slots occurring on each day. Select how many slots will occur between the interview slots, as well as the location of the interviews.

From  

To  

Total number of Slots required

Slot duration

Time between slots



Location [Show all locations](#)

19. Select the date that the interview will be held on using the **calendar** on the right side of the screen

## Create New Slots

Create interview slots on multiple days at a time, specify dates and times and durations.

Select the dates that you would like to create interview slots for. You can create slots on multiple days at a time. Then select the start and end times of the interview slots occurring on each day. Select how many slots will occur in that time range and how long each slot will be. Specify if any gaps will occur between the interview slots, as well as the location of the interviews.

From   To  

Total number of Slots required

Slot duration

Time between slots

Location [Show only related locations](#)

[Add Interview Slots](#)

January 2016

	M	T	W	T	F	S	S
1	28	29	30	31	1	2	3
2	4	5	6	7	8	9	10
3	11	12	13	14	15	16	17
4	18	19	20	21	22	23	24
5	25	26	27	28	29	30	31
6	1	2	3	4	5	6	7

[Previous](#) [Next](#)

20. In this example we have selected 1 February 2016. When you are happy with the slots you have created, click the purple 'Add Interview Slots' in the middle of the screen

Create New Slots

Create interview slots on multiple days at a time, specify dates and times and durations.

Select the dates that you would like to create interview slots for. You can create slots on multiple days at a time. Then select the start and end time of the interview slots occurring on each day. Select how many slots will occur in that time range and how long each slot will be. Specify if any gaps will occur between the interview slots, as well as the location of the interviews.

From: 10:00 To: 13:15

Total number of Slots required: 3

Slot duration: 1 Hour

Time between slots: 5 Minutes

Location: LSE

Dates

January 2016						
	M	T	W	T	F	S
1	28	29	30	31	1	2
2	4	5	6	7	8	9
3	11	12	13	14	15	16
4	18	19	20	21	22	23
5	25	26	27	28	29	30
6	1	2	3	4	5	6

Add Interview Slots

21. The 'Create Interview Slots' window will appear. Review the slots to check they are correct and press 'OK' or 'Cancel' to go back.

Create Interview Slots

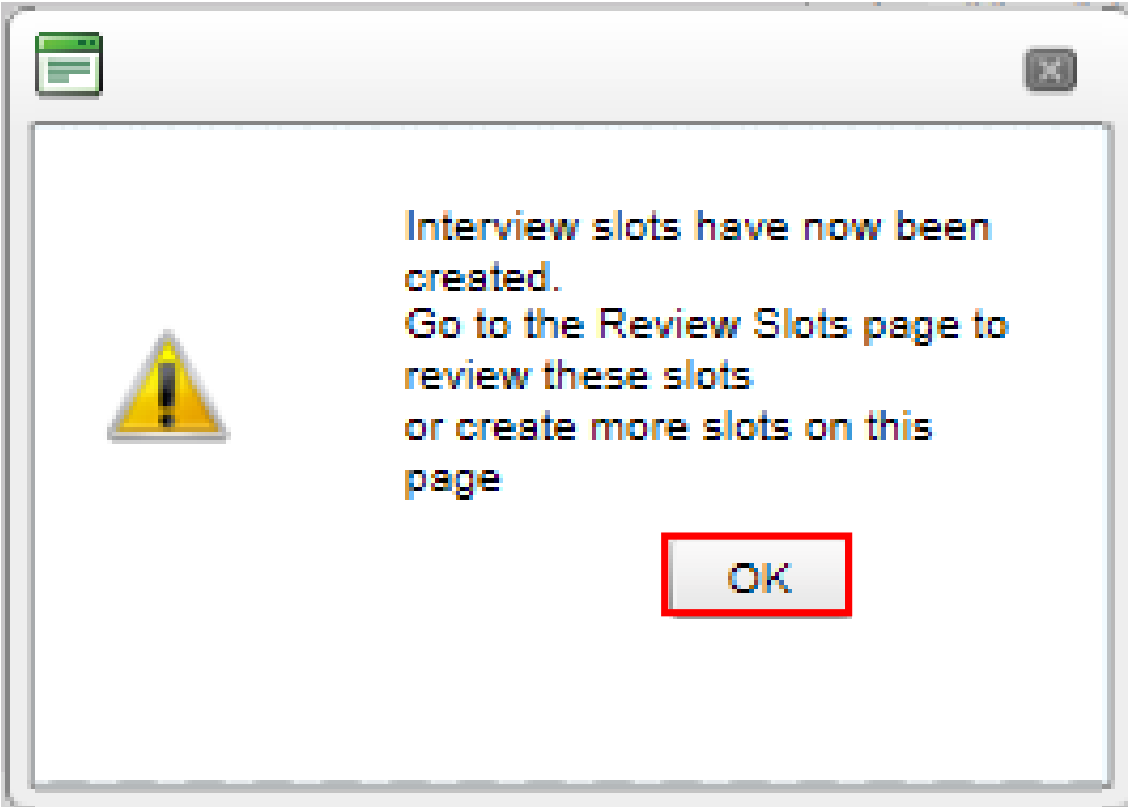
You are about to create the following interview slots:

- 1 Feb 10:00 - 11:00
- 1 Feb 11:05 - 12:05
- 1 Feb 12:10 - 13:10

Would you like to proceed?

OK Cancel

22. When you click 'OK' you will see a message to confirm that your slots have been created. Click 'OK' to proceed.



23. Click 'Next' in the bottom right side of the screen to proceed.

Create interview slots on multiple days at a time, specify dates and times and durations.

Create New Slots

Select the dates that you would like to create interview slots for. You can create slots on multiple days at a time. Then select the start and end times of the interview slots occurring on each day. Select how many slots will occur in that time range and how long each slot will be. Specify if any gaps will occur between the interview slots, as well as the location of the interviews.

From

To

Total number of Slots required

Slot duration

Time between slots

Location

3

1 Hour

5 Minutes

LSE

Show only related locations

Dates

January 2016

	M	T	W	T	F	S	S
1	28	29	30	31	1	2	3
2	4	5	6	7	8	9	10
3	11	12	13	14	15	16	17
4	18	19	20	21	22	23	24
5	25	26	27	28	29	30	31
6	1	2	3	4	5	6	7

Add Interview Slots

Previous


Next







24. The **'Review Slots'** screen will appear showing clearly the slot that has been created for each of the 3 candidates. If you wish to remove any of the slots click the red **'X'** next to the slot.

**Review Slots** Review and edit the slots on the schedule. To change the times of a slot delete a slot and recreate it in the previous page.







Filter by date



Filter by location

 Bulk Remove Slots

<input type="checkbox"/>	Slot	Status	View	Remove
<input type="checkbox"/>	1 Feb 12:10 - 13:10	Available		
<input type="checkbox"/>	1 Feb 11:05 - 12:05	Available		
<input type="checkbox"/>	1 Feb 10:00 - 11:00	Available		

25. If you are happy with the slots, tick the boxes next to all the slots and click the purple **'Next'** button at the bottom right of the screen.

<input checked="" type="checkbox"/>	Slot	Status	View	Remove
<input checked="" type="checkbox"/>	1 Feb 12:10 - 13:10	Available		
<input checked="" type="checkbox"/>	1 Feb 11:05 - 12:05	Available		
<input checked="" type="checkbox"/>	1 Feb 10:00 - 11:00	Available		

26. The **'Email Details'** screen will appear. This is where you can select which invite template you would like to use to send to the candidates.

27. In the '**Candidate publication notification email**' field select the template from the **drop-down** list. In this example we are inviting candidates for their first interview and so we will use the '**CAND – Invite to 1<sup>st</sup> Interview (PS)**' template. The (PS) denotes professional services.

**Please note:** This template should also be used in cases where there is only one interview stage.

The screenshot shows the 'Email Details' section of a system. The title 'Email Details' is highlighted with a red box. Below it, the subtitle reads 'Set which email templates will be used at each stage of this schedule'. There are four rows of configuration options:

- 'Candidate publication notification email' with a dropdown menu and an 'Edit template' link.
- 'Candidate publication reminder email' with a dropdown menu and an 'Edit template' link.
- 'Reminder sent after' with two input fields and a dropdown menu.
- 'Candidate finalise notification email' (highlighted with a red box) with a dropdown menu showing 'CAND - 2nd Interview Confirmed (PS)' (also highlighted with a red box) and an 'Edit template' link.

28. Click the red '**edit template**' link to view and edit the template.

This screenshot shows the same 'Email Details' form. In this view, the 'Candidate publication notification email' dropdown is set to 'CAND - Invite to 1st Interview (PS)'. The 'Edit template' link next to it is highlighted with a red box. The other fields remain the same as in the previous screenshot.

29. The 'add email template' window will appear.

**Add Email Template**

Name\* CAND - Invite to 1st Interview (PS)

System Type ☐

Email Type\* Candidate notification of schedule publication

Description\* CAND - Invite to 1st Interview (PS) (Max 100 characters)

Subject\* LSE Jobs Message: Invite to interview for {VacancyTitle}

Body\*

Dear {CandidateTitle} {CandidateLastName}

Further to your recent application for the post of {VacancyTitle} we are pleased to inform you that we would like to invite you for an interview.

Please click here to log-in to the system and select your interview slot. If you are unable to attend any of the available slots, please let us know by contacting [hr.jobs@lse.ac.uk](mailto:hr.jobs@lse.ac.uk).

Please report to <INSERT INTERVIEW LOCATION> at least 10 minutes prior to your interview time where a member of staff will be waiting to receive you.

The Panel Members are:  
<INSERT PANEL MEMBER NAMES AND JOB TITLES HERE>

<IS A TEST IS REQUIRED? – INSERT DETAILS HERE>

<IS A PRESENTATION REQUIRED? – INSERT DETAILS HERE>

☐ only for me ☒ for everyone

OK Cancel

The template gives you flexibility to tailor it to the vacancy, depending on how you would like to run the interviews. You will need to include additional information about the interview so that candidates can prepare, as follows:

#### I. Adding the location of the interview

Edit the following sentence in the template to tell candidates where to come to for the interview. If you have a name of the person that they should ask, please add their name here too.

Please report to <INSERT INTERVIEW LOCATION> at least 10 minutes prior to your interview time where a member of staff will be waiting to receive you.

#### II. Adding panel members names

Edit the following sentence in the template to tell candidates who they will be interviewed by

The Panel Members are:

<INSERT PANEL MEMBER NAMES AND JOB TITLES HERE>

### III. Adding information about a test

Edit the following sentence in the template to tell candidates if they will be asked to take a test and any further information so that they can prepare. If you need advice on tests, please contact your HR Adviser. If this is not applicable, please remove this text.

<IS A TEST IS REQUIRED? – INSERT DETAILS HERE>

### IV. Adding information about a presentation

Edit the following sentence in the template to tell candidates if they will be asked to give a presentation and any further information so that they can prepare. If this is not applicable, please remove this text.

<IS A PRESENTATION REQUIRED? – INSERT DETAILS HERE>

### V. Adding additional information about an interview

Edit the following sentence in the template to tell candidates anything else that they will need to be aware of in advance of their interview, for example, if they will be invited to lunch, have meetings with anyone else on the day, have a tour of the School etc. If this is not applicable, please remove this text.

<IS THERE ANY ADDITIONAL INFORMATION THAT YOU WOULD LIKE TO INCLUDE ABOUT THE INTERVIEW PROCESS? – IF YES, INSERT DETAILS HERE>

30. When you are happy with the template click the purple 'OK' button. You will return to the 'Email Details' screen.

REQUIRED? – INSERT DETAILS HERE>

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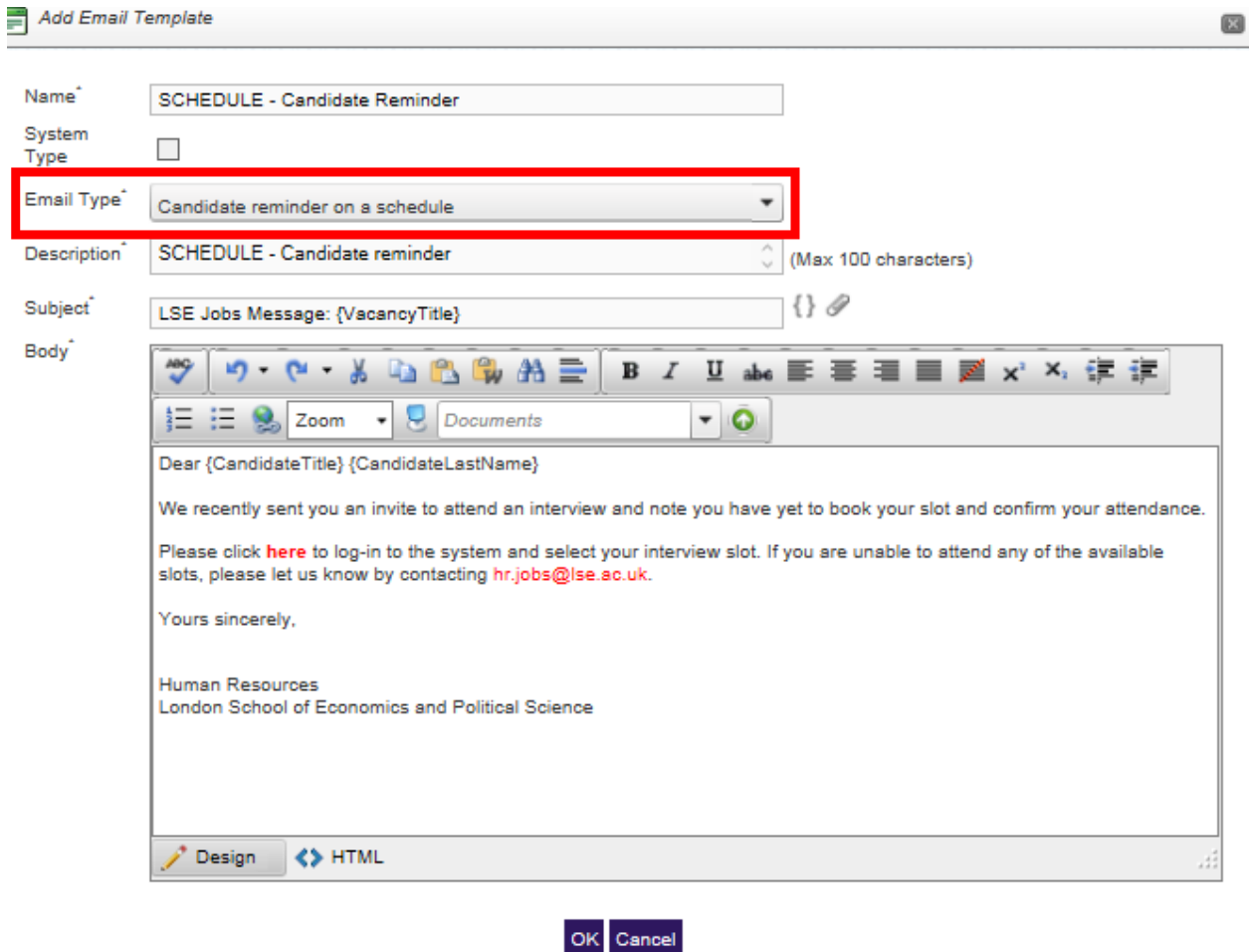
/one



---

31. The '**Candidate publication reminder email**' field allows you to set up an automatic reminder to be sent to candidates who have not booked their interview slot.

Select '**Schedule Candidate Reminder**' in the drop down and click the red '**edit temple**' link. The '**Add Email Template**' window will appear. Scroll through the email and edit the content if you wish to do so.



32. Click the purple '**OK**' button if you are happy with the content. You will return to the '**Email Details**' screen





33. In the '**Reminder sent after**' field, you can specify the number of minutes, hours or days that you would like to send the reminder email to candidates if they have not booked their interview. In this example, we have selected 2 days. Therefore, if candidates have not booked their interview slot within 2 days of receiving the original email, they will receive a reminder.

The screenshot shows the 'Email Details' form with the following configuration:

Field	Value	Action
Candidate publication notification email	CAND - Invite to 1st Interview (PS)	Edit template
Candidate publication reminder email	SCHEDULE - Candidate Reminder	Edit template
Reminder sent after	2 Day(s)	
Candidate finalise notification email	CAND - 2nd Interview Confirmed (PS)	Edit template

Buttons: Previous, Save and Continue

34. In the '**Candidate finalise notification email**' field you can specify the template that will be sent to the candidate when they have booked their interview slot. In this example, we have selected the template '**CAND – 1<sup>st</sup> Interview Confirmed (PS)**'. As before, you can also use this template if there is only one interview in the process.

The screenshot shows the 'Email Details' form with the following configuration:

Field	Value	Action
Candidate publication notification email	CAND - Invite to 1st Interview (PS)	Edit template
Candidate publication reminder email	SCHEDULE - Candidate Reminder	Edit template
Reminder sent after	2 Day(s)	
Candidate finalise notification email	CAND - 1st Interview Confirmed (PS)	Edit template

Buttons: Previous, Save and Continue

35. Click the red '**edit template**' link to view and edit the content of the email.

36. The '**Add Email Template**' window will appear showing the message that the candidate will receive.

This is a standard template which is designed to let the candidate know that their interview is confirmed and they will receive it once they go into the system and choose their interview slot. You do not need to edit it, however you may do so if you wish.

Set which email templates will be used at each stage of this schedule

**Email Details**

**Add Email Template**

Name: CAND - 1st Interview Confirmed (PS)

System Type: ☐

Email Type: Candidate finalise schedule

Description: CAND - 1st Interview Confirmed (PS) (Max 100 characters)

Subject: LSE Jobs Message: Interview confirmed for {VacancyTitle}

Body:

Dear {CandidateTitle} {CandidateLastName}

Thank you for booking your interview slot for the post of {VacancyTitle}.

A map of the School can be found at: <http://www.lse.ac.uk/mapsAndDirections/home.aspx>

If for any reason you can no longer attend, please let us know by e-mail to [HR.jobs@lse.ac.uk](mailto:HR.jobs@lse.ac.uk)

We look forward to meeting you.

Yours sincerely,

Human Resources  
London School of Economics and Political Science

Design HTML

☐ only for me ☒ for everyone

OK Cancel

37. When you are happy with the content of the email click the purple '**OK**' button.



38. You will return to the '**Email Details**' screen. Click the purple '**save and continue**' button in the bottom right side of the screen.

**Email Details**

Candidate publication notification email: CAND - Invite to 1st Interview (PS) [Edit template](#)

Candidate publication reminder email: SCHEDULE - Candidate Reminder [Edit template](#)

Reminder sent after: 2 Day(s)

Candidate finalise notification email: CAND - 1st Interview Confirmed (PS) [Edit template](#)

[Previous](#) [Save and Continue](#)

39. The '**Publish to Candidates**' screen will appear. This is where you can send the emails out to the candidates.

You will see the names of the candidates that you are inviting to interview. Check that the boxes next to their names are ticked.

**Publish To Candidates** See which candidates are available to invite and notify them of the schedule.

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system: lsejobs@engageats.co.uk ☒

Send from me: Convenor1@test.com ☐

View: Show all candidates

Filter by location: Filter by location...

Re-Order: -- Re-Order candidates --

Appointment date between: and

[Publish Schedule](#) ☐ Publish to candidates but don't send emails

[Export Excel Schedule](#) [Print Schedule](#) [Bulk print](#)

<input checked="" type="checkbox"/>	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
<input checked="" type="checkbox"/>	3500350	sarah@test.com	Sarah Brown	Position	Not published to candidate	
<input checked="" type="checkbox"/>	3500377	Steven@test.com	Steven Hudson	Position	Not published to candidate	
<input checked="" type="checkbox"/>	3500422	Stacey@test.com	Stacey Miller	Position	Not published to candidate	

40. Click the purple '**publish schedule**' button in the middle of the screen.

Appointment date between

**Publish Schedule** Publish to candidates but ☐ don't send emails

Export Excel Schedule

41. A pop-up message will appear asking you to confirm that you would like to continue. **TIP:** check that you have included all the candidates that you would like to invite and that you have created the slots correctly before clicking '**OK**' or click '**Cancel**' to go back.

**Message from webpage**

This schedule will be published to candidates and you will be able to confirm which slot the candidate will take from within this screen. If the tick box Publish to candidates but do not send emails, is unticked then the candidate will get an email and they will be able to book their own slots.  
Are you sure you would like to continue?

**OK** **Cancel**

42. Once you have clicked 'OK' you will see the '**Schedules**' page, showing you the list of vacancies that you have created interview schedules for. You will also see that the status of the interview schedule has changed to '**Published to Candidates**' as in the Administrator example.

<b>Search Schedules</b> Schedule <input type="text"/> Application Stage: All Application Stages Schedule Type: All Schedule Types Vacancy: All Vacancies Status: All States excl. Closed Search Clear search		<b>Schedules</b> Create schedule with participants  Create schedule without participants  Create schedule for an event							
		Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
		Administrator	1/2	1/2	Published to Candidates	3	0		
		Test	14/1	14/1	Published to Candidates	1	0		
		DB Admin Interviews	20/1	20/1	Finalised	2	2		

43. If you wish to 'Edit' the Schedule, you can do so by clicking the 'Edit' icon

**Search Schedules**

Schedule

Application Stage:

Schedule Type:

Vacancy:

Status:

Search Clear search

**Schedules**

Create schedule with participants Create schedule without participants Create schedule for an event

Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
Administrator	1/2	1/2	Published to Candidates	3	0		
Test	14/1	14/1	Published to Candidates	1	0		
DB Admin Interviews	20/1	20/1	Finalised	2	2		

44. As soon as at least one candidate has booked their slot the status of the interviews will change to 'Finalised'.

Once all candidates have booked their slot you will need to 'Finalise the Schedule' in order for the candidates to receive the email to confirm their interview. Click the 'Edit' icon.

**Search Schedules**

Schedule

Application Stage:

Schedule Type:

Vacancy:

Status:

Search Clear search

**Schedules**

Create schedule with participants Create schedule without participants Create schedule for an event

Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
Postgraduate Administrator	16/2	16/2	Candidates Confirmed	4	1		
Events manager	8/2	8/2	Candidates Confirmed	6	1		
Course Manager	16/2	25/2	Candidates Confirmed	6	1		
Employer Engagement Adviser Interviews (Feb 2016)	8/2	8/2	Published to Candidates	5	0		
Content Management Administrator	1/2	1/2	Closed	2	1		
Book Manager	1/2	1/2	Closed	2	1		
Administrator	15/2	15/2	Finalised	5	3		

45. You will see that there is a red cross next to the 'Finalise Schedule' menu option on the right. Click on it.

**Schedule Details**

Set the schedule name and the criteria that will be used to select candidates

Schedule Name: Course Manager

Description: Course Manager

Application stage: Invite to interview

Add Vacancy(s): Course Manager

This schedule is: ☐ only for me ☒ for everyone

Candidates at application stage: 1 candidates

Candidates invited to schedule not yet accepted: 1 candidates

**SCHEDULING STATUS**

Overview

Schedule Details

Create Slots

Review Slots

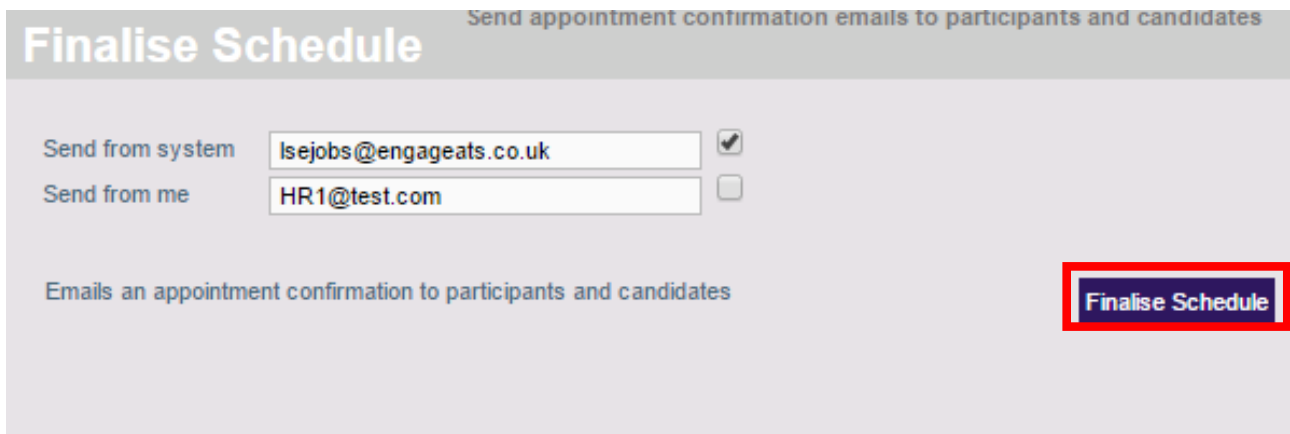
Select Email Templates

Publish to Candidates

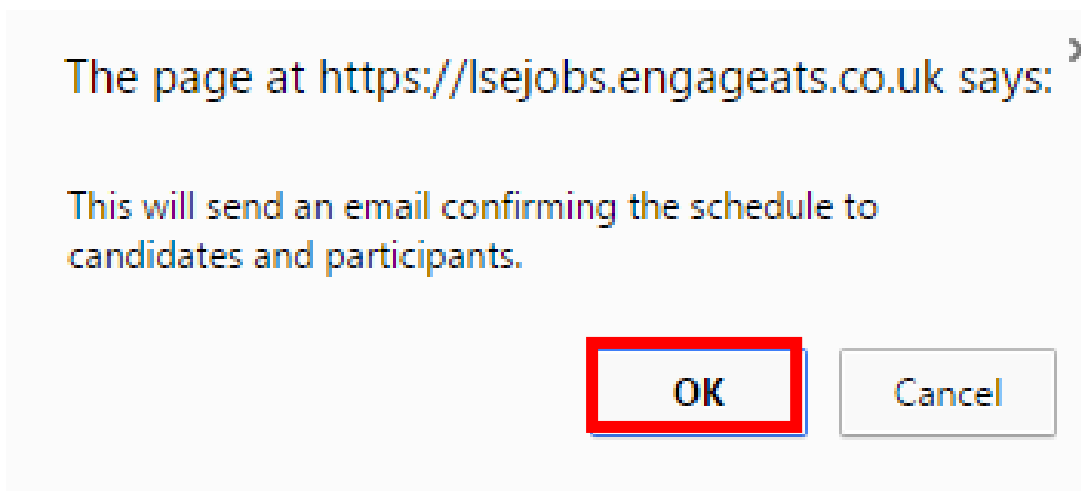
Finalise Schedule

Email Correspondence History

46. If a candidate has confirmed their interview slot, the 'Finalise Schedule' button will appear in purple. If it is grey, it means that no candidates have confirmed their slot.



47. A pop-up window will appear. Click 'OK' to confirm that you want the system to send the confirmation email to the candidates.



**Important Note:** The confirmation email will only be sent to the candidate(s) who have selected their interview slot. Therefore, it is advisable to wait until all candidates have confirmed their slots before finalising the schedule.

## Creating Interview Schedules for 2<sup>nd</sup> Interviews

1. If you are creating a schedule for a 2<sup>nd</sup> interview you can follow exactly the same process as when creating the schedule for the 1<sup>st</sup> interview.
2. However, in the Schedule Name field on the Schedule Details screen you should call it the post title and 2<sup>nd</sup> interview for example, Administrator 2<sup>nd</sup> Interview to differentiate it from the first schedule. You should also use the 'Invite to 2nd Interview' and '2<sup>nd</sup> Interview Confirmed' templates instead to clarify it is a second interview.

## Allocating an interview slot to a candidate

1. You can give candidates specific slots if they cannot book their own slots themselves or if you want to allocate a specific time to a particular individual. However, this will only be possible if you have already created the interview schedule in the system.
2. Log-in to the system and click on the 'Interviews' tab.

Home Search My Settings Vacancies Approval Request **Interviews** Reports FAQs

---

**Number of Applications by Vacancy**

Vacancy Live Status: ☐ All Vacancy Status: ☐ All Vacancy Title:  Vacancy ID:

Vacancy Name	Live status	Status	Closing date
HR Business Analyst	Live	Published	15/01/2016
Administrator	Not Live	Published	Ongoing
HR Manager, Information and Systems	Not Live	Interview	12/01/2016
HR Data Cleanser	Not Live	Interview	10/01/2016
DB Admin - Test IMT Job	Live	Offer	18/01/2016
HR Analyst	Not Live	Published	12/01/2016

3. You will see a list of Interview schedules you have created. In this example, we are using the 'Administrator' vacancy. Click the 'Edit' icon

Home Search My Settings Vacancies Approval Request **Interviews** Reports FAQs

---

**Search Schedules**

Schedule:

Application Stage:

Schedule Type:

**Schedules**

[Create schedule with participants](#) [Create schedule without participants](#) [Create schedule for an event](#)

Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
HR Business Analyst	15/1	15/1	Finalised	3	2		
Administrator	1/2	1/2	Published to Candidates	3	0		
DB Admin Interviews	20/1	20/1	Finalised	2	2		



4. You will see the '**Schedule Details**' screen. Click the '**Publish to Candidates**' link on the right

## Schedule Details

Set the schedule name and the criteria that will be used to select candidates

Schedule Name:

Description:

Application stage:

Add Vacancy(s):

This schedule is: ☐ only for me ☒ for everyone

Candidates at application stage: 2 candidates

Candidates invited to schedule not yet accepted: 2 candidates

Candidates that have accepted the schedule: 0 candidates

New candidates that could be invited to schedule: 0 candidates

### SCHEDULING STATUS

- Overview
- Schedule Details ☒
- Create Slots ☒
- Review Slots ☒
- Select Email Templates ☒
- Publish to Candidates ☒**
- Finalise Schedule ☒
- Email Correspondence History ☒

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

### Tool Tips

- ☒ Section complete
- ☐ Incomplete optional fields
- ☒ Incomplete section

5. This screen will appear:

Ensure that the candidates are not highlighted (as below). If they are, un-tick the box on the left-side of their name.

## Publish To Candidates

See which candidates are available to invite and notify them of the schedule.

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system:  ☒

Send from me:  ☐

View:

Filter by location:

Re-Order:

Appointment date between:  and

**Publish Schedule** **Publish Additional Slots To Candidates** ☐ Publish to candidates but don't send emails

[Export Excel Schedule](#) [Print Schedule](#) [Bulk print](#)

<input type="checkbox"/>	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
<input type="checkbox"/>	3500350	<a href="#">sarah@test.com</a>	Sarah Brown	Administrator	Published to candidate	
<input type="checkbox"/>	3500377	<a href="#">Steven@test.com</a>	Steven Hudson	Administrator	Published to candidate	
<input type="checkbox"/>	3500422	<a href="#">Stacey@test.com</a>	Stacey Miller	Administrator	Published to candidate	

### SCHEDULING STATUS

- Overview
- Schedule Details ☒
- Create Slots ☒
- Review Slots ☒
- Select Email Templates ☒
- Publish to Candidates ☒
- Finalise Schedule ☒
- Email Correspondence History ☒

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

### Tool Tips

- ☒ Section complete
- ☐ Incomplete optional fields

- To book a candidate into a slot that you have already created, click on the link to their email address.

**Publish To Candidates** See which candidates are available to invite and notify them of the schedule.

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system:  ☒

Send from me:  ☐

View:

Filter by location:

Re-Order:

Appointment date between:  and

**Publish Schedule** **Publish Additional Slots To Candidates** ☐ ☒

☒ **Export Excel Schedule**

<input type="checkbox"/>	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
<input type="checkbox"/>	3500350	<a href="mailto:sarah@test.com">sarah@test.com</a>	Sarah Brown	Administrator	Published to candidate	
<input type="checkbox"/>	3500377	<a href="mailto:Steven@test.com">Steven@test.com</a>	Steven Hudson	Administrator	Published to candidate	
<input type="checkbox"/>	3500422	<a href="mailto:Stacey@test.com">Stacey@test.com</a>	Stacey Miller	Administrator	Published to candidate	

- You will see this screen. Click on the 'appointments' icon.

Home Search My Settings Vacancies Approval Request Interviews Reports FAQs

[Select All](#) [Select None](#)

Currently using Client Default Search Form. [Click here to Change](#)

Search Candidates

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Candidate	Details	Process	Select
Stacey Miller 	Vacancy Name: <a href="#">Administrator</a> Application Stage: Invite to interview Registered on: 12/01/2016 Vacancy ID: 11	<div> view  View  contact  Trns  process  rcmr  <b>appointments</b>  note</div> <div> e-mail  history  CV  add docs  Checklist  print  Referenc  Edit App</div>	<input type="checkbox"/>

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

8. The '**Candidate Appointments**' screen will appear. At the bottom of the screen, you will see the interview that the candidate has been invited to attend. Click the link to view the interview slots that have been created.

**Candidate Appointments**

31/01/2016 - 06/02/2016 Day Week Month

	Sun, 31	Mon, 1	Tue, 2	Wed, 3	Thu, 4	Fri, 5	Sat, 6
all day							
8 am							
10 am							
12 pm							
2 pm							
4 pm							

Show 24 hours...

This candidate has been invited to confirm their availability for the following:

Administrator

9. Hover the slot that you would like to book the candidates into and press '**confirm**'

Application to Administrator Submitted 1/12/2016

Available locations All locations

Please select a date and time out of the available options. You will receive an email confirming the appointment.

◀ ▶ today
2/14/2016 - 2/20/2016
Day Week Month

	Sun, 14	Mon, 15	Tue, 16	Wed, 17	Thu, 18	Fri, 19	Sat, 20
All Day							
08:00							
09:00							
10:00							
11:00							
12:00							
13:00		<div> <div>1:00 PM</div> <div>Administrator</div> <div>for Administrative Assistant at LSE on 15 Feb 13:00 - 14:00</div> <div>Location: LSE</div> </div>					
14:00		<div> <div>2:00 PM</div> <div>Administrator</div> <div>Location: LSE</div> </div>					
15:00		<div> <div>3:10 PM</div> <div>Confirm</div> <div>Location: LSE</div> </div>					
16:00		<div> <div>4:15 PM - 5:15 PM</div> <div>Location: LSE</div> </div>					
17:00							

Show 24 hours...

10. You will be taken to the interview schedules page;

### Search Schedules

Schedule

Application Stage:

All Application Stages

Schedule Type:

All Schedule Types

Vacancy:

All Vacancies

Status:

All States excl. Closed

Search

Clear search

### Schedules

Create schedule with participants

Create schedule without participants

Create schedule for an event

Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
Postgraduate Administrator	16/2	16/2	Candidates Confirmed	4	1		
Events manager	8/2	8/2	Candidates Confirmed	6	1		
Course Manager	16/2	25/2	Candidates Confirmed	6	1		
Employer Engagement Adviser Interviews (Feb 2016)	8/2	8/2	Published to Candidates	5	0		
Content Management Administrator	1/2	1/2	Closed	2	1		
Book Manager	1/2	1/2	Closed	2	1		
Administrator	1/2	15/2	Candidates Confirmed	4	1		

11. If you have other candidates that you would like to allocate slots to, you can do that by repeating the process as set out above.

12. Once you have allocated the slots you will need to click the **'Select Email Templates'** page and edit the templates to tell the candidates what slots they have been booked into.

### Schedule Details

Set the schedule name and the criteria that will be used to select candidates

Schedule Name

Administrator

Description

Administrator

Application stage

Invite to interview

Add Vacancy(s)

Administrator x

This schedule is

☐ only for me ☒ for everyone

Candidates at application stage

2 candidates

Candidates invited to schedule not yet accepted

2 candidates

Candidates that have accepted the schedule

1 candidates

New candidates that could be invited to schedule

0 candidates

Previous

Save and Continue

#### SCHEDULING STATUS

Overview

Schedule Details

Create Slots

Review Slots

Select Email Templates

Publish to Candidates

Finalise Schedule

Email Correspondence History

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

#### Tool Tips

Section complete

Incomplete optional fields

Incomplete section

13. Edit the templates by clicking the **'Edit Template'** links next to the drop-downs.

### Email Details

Set which email templates will be used at each stage of this schedule

Candidate publication notification email

CAND - Invite to 1st Interview (PS)

Edit template

Candidate publication reminder email

SCHEDULE - Candidate Reminder

Edit template

Reminder sent after

2

Day(s)

Candidate finalise notification email

CAND - 1st Interview Confirmed (PS)

Edit template

Previous

Save and Continue

#### SCHEDULING STATUS

Overview

Schedule Details

Create Slots

Review Slots

Select Email Templates

Publish to Candidates

Finalise Schedule

Email Correspondence History

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

#### Tool Tips

Section complete

Incomplete optional fields

Incomplete section

14. Click the 'Finalise Schedule' page.

**Schedule Details** Set the schedule name and the criteria that will be used to select candidates

Schedule Name: Administrator  
Description: Administrator  
Application stage: Invite to interview  
Add Vacancy(s): Administrator x  
This schedule is: ☐ only for me ☒ for everyone

Candidates at application stage: 2 candidates  
Candidates invited to schedule not yet accepted: 2 candidates  
Candidates that have accepted the schedule: 1 candidates  
New candidates that could be invited to schedule: 0 candidates

**SCHEDULING STATUS**

- Overview
- Schedule Details ✓
- Create Slots ✓
- Review Slots ✓
- Select Email Templates ✓
- Publish to Candidates ✓
- Finalise Schedule** ✗
- Email Correspondence History ✓

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

**Tool Tips**

- ✓ Section complete
- ? Incomplete optional fields
- ✗ Incomplete section

Previous Save and Continue

15. Check the box if you would like the email notifications to come from yourself and click the 'Finalise Schedule' button. The system will send the candidate(s) the interview emails to the candidates.

**Finalise Schedule** Send appointment confirmation emails to participants and candidates

Send from system: lsejobs@engageats.co.uk ☒  
Send from me: HR1@test.com ☐

Emails an appointment confirmation to participants and candidates

**Finalise Schedule**

## Changing a candidate's confirmed interview slot

1. Go to the **'Interviews'** tab and find the relevant interview schedule. For this example, we are using the **'Administrator'** schedule. Click the **'Edit'** icon.

### Search Schedules

Schedule

Application Stage:

All Application Stages

Schedule Type:

All Schedule Types

Vacancy:

All Vacancies

Status:

All States excl. Closed

Search Clear search

### Schedules

Create schedule with participants Create schedule without participants Create schedule for an event

Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
Postgraduate Administrator	16/2	16/2	Candidates Confirmed	4	1		
Events manager	8/2	8/2	Candidates Confirmed	6	1		
Course Manager	16/2	25/2	Candidates Confirmed	6	1		
Employer Engagement Adviser Interviews (Feb 2016)	8/2	8/2	Published to Candidates	5	0		
Content Management Administrator	1/2	1/2	Closed	2	1		
Book Manager	1/2	1/2	Closed	2	1		
Administrator	1/2	15/2	Candidates Confirmed	4	1		

2. Click the **'Publish to Candidates'** menu option on the right-side of the screen.

### Schedule Details

Set the schedule name and the criteria that will be used to select candidates

Schedule Name: Administrator

Description: Administrator

Application stage: Invite to interview

Add Vacancy(s): Administrator

This schedule is: ☐ only for me ☒ for everyone

Candidates at application stage: 2 candidates

Candidates invited to schedule not yet accepted: 2 candidates

Candidates that have accepted the schedule: 1 candidates

New candidates that could be invited to schedule: 0 candidates

### SCHEDULING STATUS

Overview

Schedule Details

Create Slots

Review Slots

**Publish to Candidates**

Print Schedule

Email Correspondence History

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

- Click on the appointment details link next to the candidate's name.

**Publish To Candidates** See which candidates are available to invite and notify them of the schedule.

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system:  ☒

Send from me:  ☐

View:

Filter by location:

Re-Order:

Appointment date between:  and

**Publish Schedule** **Publish Additional Slots To Candidates** ☐ Publish to candidates but don't send emails

**Export Excel Schedule**

<input type="checkbox"/>	Id	Email Address	Candidate	Vacancy	Status
<input type="checkbox"/>	3500350	sarah@test.com	Sarah Brown	Administrator	Published
<input type="checkbox"/>	3500377	Steven@test.com	Steven Hudson	Administrator	Published
<input type="checkbox"/>	3500422	Stacey@test.com	Stacey Miller	Administrator	Candidate

**Administrator - Invite to interview**

Candidate: **Stacey Miller**  
Contact:

First name: Stacey  
Surname: Miller  
Address Line 1: 20 Third Avenue  
Address Line 2:  
Address Line 3:  
Address Line 4: Dagenham  
Postcode: Essex  
Preferred contact number: 010292  
E-mail address: Stacey@test.com  
Title: Mrs  
Preferred contact number type: Mobile phone No  
Vacancy: Administrator  
Location: LSE  
Date and Time: 15 Feb 13:00 - 14:00

**Cancel** **Cancel**

Contact Us - Application query

- You will see the following window. To cancel the appointment, select the first **red cross** (the delete icon).

**Publish To Candidates** See which candidates are available to invite and notify them of the schedule.

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system:  ☒

Send from me:  ☐

View:

Filter by location:

Re-Order:

Appointment date between:  and

**Publish Schedule** **Publish Additional Slots To Candidates** ☐ Publish to candidates but don't send emails

**Export Excel Schedule** **Print Schedule** **Bulk print**

<input type="checkbox"/>	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
<input type="checkbox"/>	3500350	sarah@test.com	Sarah Brown	Administrator	Published to candidate	
<input type="checkbox"/>	3500377	Steven@test.com	Steven Hudson	Administrator	Published to candidate	
<input type="checkbox"/>	3500422	Stacey@test.com	Stacey Miller	Administrator	Candidate Confirmed	15 Feb 13:00 - 14:00 at LSE

**SCHEDULING STATUS**

Scheduling Status	Complete
Overview	
Schedule Details	✓
Create Slots	✓
Review Slots	✓
Select Email Templates	✓
Publish to Candidates	✓
Finalise Schedule	✗
Email Correspondence History	✓

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

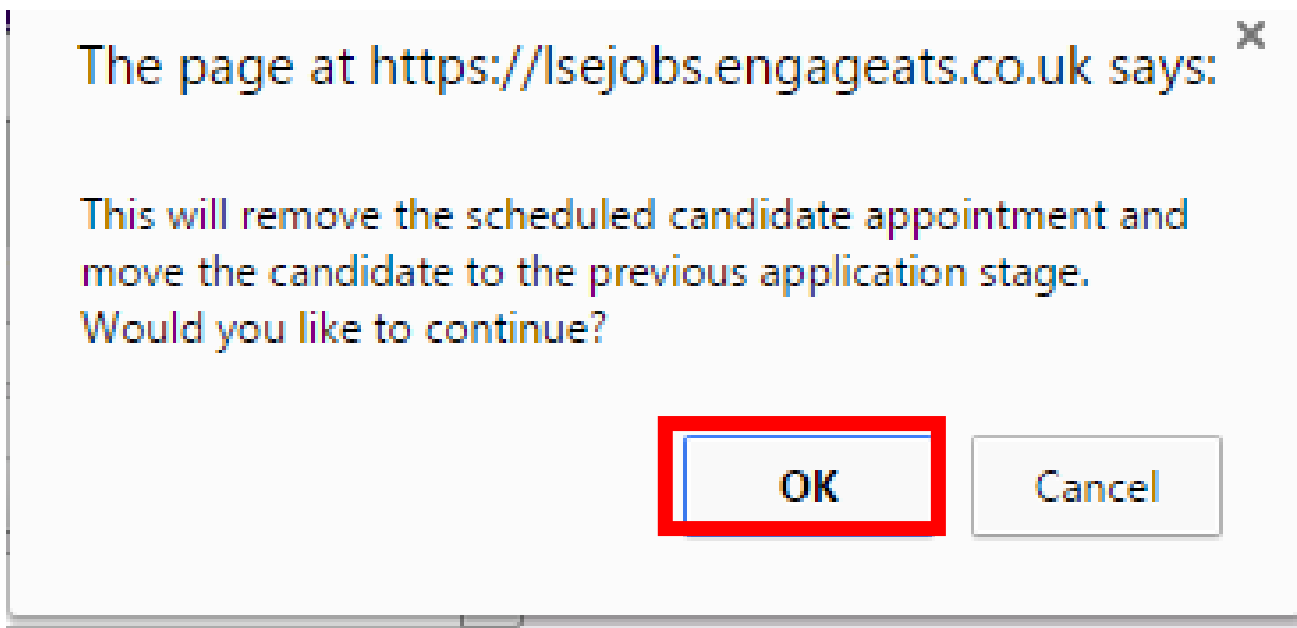
**Tool Tips**

- ✓ Section complete
- ? Incomplete optional fields
- ✗ Incomplete section

**Previous** **Next**



5. A pop-up window will appear, asking you to confirm you would like to remove the slot. Click 'OK' to confirm



6. The candidate's status will change to 'Candidate declined'.

**Publish To Candidates**

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system:  ☒

Send from me:  ☐

View:

Filter by location:

Re-Order:

Appointment date between:  and

**Publish Schedule** **Publish Additional Slots To Candidates** ☐ Publish to candidates but don't send emails

[Export Excel Schedule](#) [Print Schedule](#) [Bulk print](#)

<input type="checkbox"/>	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
<input type="checkbox"/>	3500350	<a href="#">sarah@test.com</a>	Sarah Brown	Administrator	Published to candidate	
<input type="checkbox"/>	3500377	<a href="#">Steven@test.com</a>	Steven Hudson	Administrator	Published to candidate	
<input type="checkbox"/>	3500422	<a href="#">Stacey@test.com</a>	Stacey Miller	Administrator	Candidate declined	

Previous Next

- To move the candidate into a new appointment slot, you will need to create the new appointment slot within the schedule. Click the **'Create slots'** option on the right.

**Publish To Candidates** See which candidates are available to invite and notify them of the schedule.

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system: ☐ lsejobs@engageats.co.uk ☒

Send from me: ☐ HR1@test.com ☐

View: Show all candidates

Filter by location: Filter by location...

Re-Order: -- Re-Order candidates --

Appointment date between: [ ] and [ ]

**Publish Schedule** **Publish Additional Slots To Candidates** Publish to candidates but don't send emails ☐

[Export Excel Schedule](#) [Print Schedule](#) [Bulk print](#)

	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
<input type="checkbox"/>	3500350	sarah@test.com	Sarah Brown	Administrator	Published to candidate	
<input type="checkbox"/>	3500377	Steven@test.com	Steven Hudson	Administrator	Published to candidate	
<input type="checkbox"/>	3500422	Stacey@test.com	Stacey Miller	Administrator	Candidate declined	

**SCHEDULING STATUS**

- Overview
- Schedule Details ☒
- Create Slots ☒
- Review Slots ☒
- Select Email Templates ☒
- Publish to Candidates ☒
- Finalise Schedule ☒
- Email Correspondence History ☒

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

**Tool Tips**

- ☒ Section complete
- ☐ Incomplete optional fields
- ☒ Incomplete section

[Previous](#) [Next](#)

- Create your slot by entering the start time and the end time, and the number of slots you would like. Select if you would like any time between the slot and then click the red **'show all locations'** link. Select **'LSE'** in the drop down list. Then click on the date of the interview in the calendar on the right and click the purple add interview slots button.

**Create New Slots** Create interview slots on multiple days at a time, specify dates and times and durations.

Select the dates that you would like to create interview slots for. You can create slots on multiple days at a time. Then select the start and end times of the interview slots occurring on each day. Select how many slots will occur in that time range and how long each slot will be. Specify any gaps will occur between the interview slots, as well as the location of the interviews.

From: 09:00 To: 10:00

Total number of Slots required: 1

Slot duration: 1 Hour

Time between slots: None

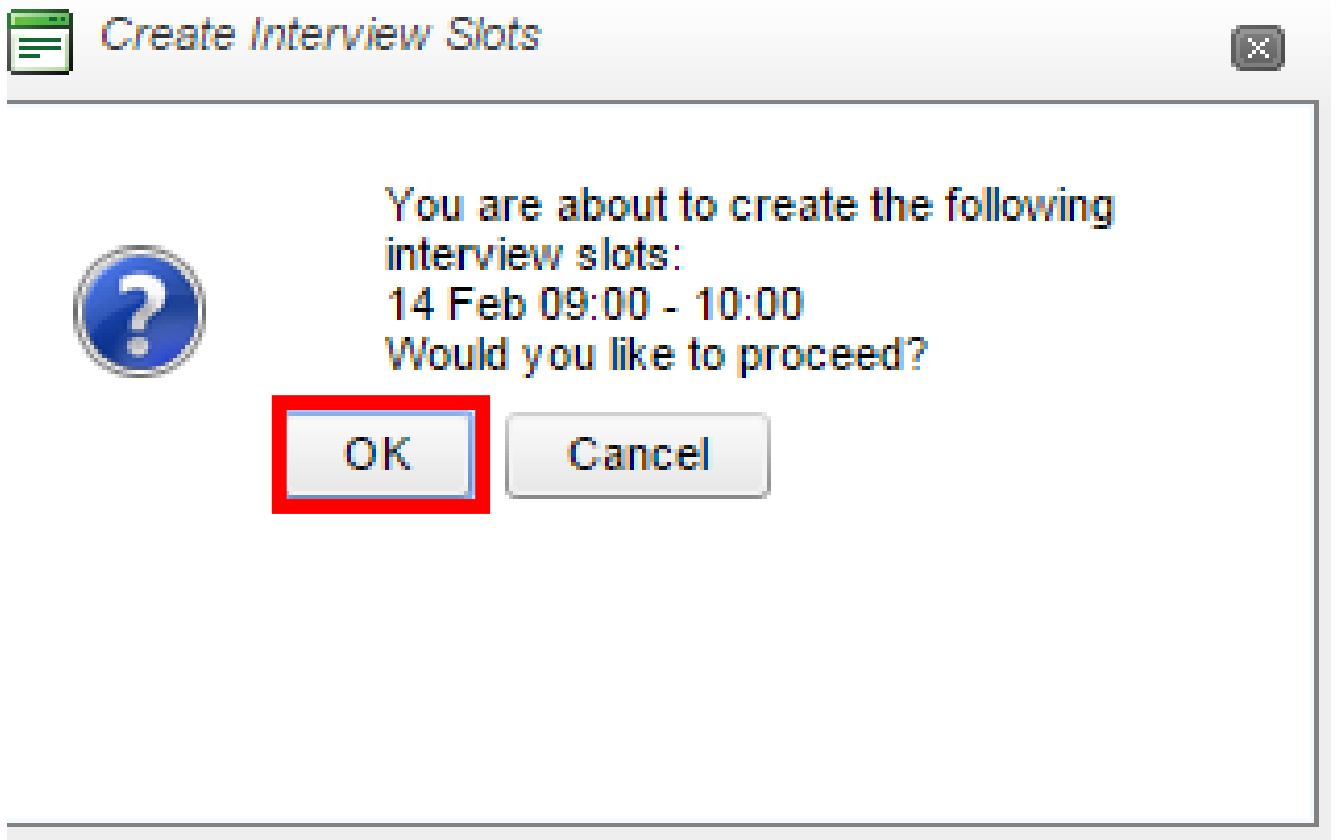
Location: [Show only related locations](#) LSE

**Add Interview Slots**

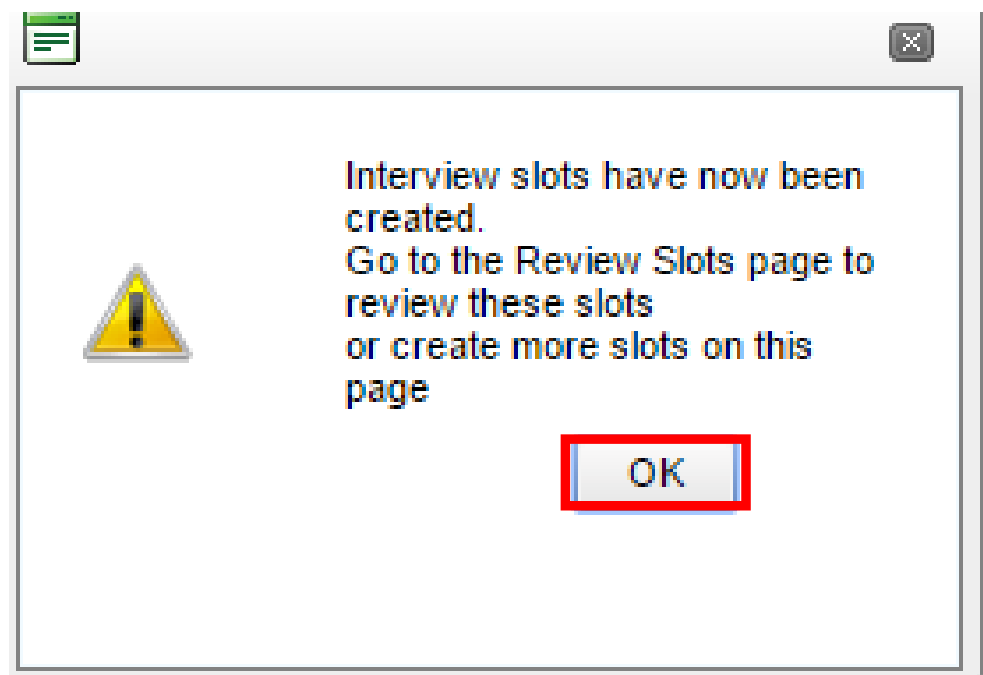
Calendar: February 2016

	S	M	T	W	T	F	S
6	31	1	2	3	4	5	6
7	7	8	9	10	11	12	13
8	14	15	16	17	18	19	20
9	21	22	23	24	25	26	27
10	28	29	1	2	3	4	5
11	6	7	8	9	10	11	12

9. A pop-up window will appear stating the slot you have created. Click '**OK**' to confirm



10. Another pop-up will appear confirming that the slot has been created. Click '**OK**' to proceed.



11. Click the 'Publish to Candidates' menu option on the right.

February 2016

	S	M	T	W	T	F	S
6	31	1	2	3	4	5	6
7	7	8	9	10	11	12	13
8	14	15	16	17	18	19	20
9	21	22	23	24	25	26	27
10	28	29	1	2	3	4	5
11	6	7	8	9	10	11	12

- Create Slots ✓
- Review Slots ✓
- Select Email Templates ✓
- Publish to Candidates ✓**
- Finalise Schedule ✗
- Email Correspondence History ✓

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

### Tool Tips

✓ Section complete

? Incomplete optional fields

Previous Next

12. Click the candidate's email address.

Publish Schedule Publish Additional Slots To Candidates Publish to candidates but don't send emails ☐ ☒

✗ Export Excel Schedule Print Schedule Bulk print

	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
<input type="checkbox"/>	3500350	sarah@test.com	Sarah Brown	Administrator	Published to candidate	
<input type="checkbox"/>	3500377	Steven@test.com	Steven Hudson	Administrator	Published to candidate	
<input type="checkbox"/>	3500422	Stacey@test.com	Stacey Miller	Administrator	Candidate declined	

Previous Next

13. Click on the 'Appointments' icon

Window tiling preferences Back to Schedule Print Settings Bulk Print Bulk Process Bulk Email Bulk References Export all scores, recs, etc.

Currently using Client Default Search Form. [Click here to Change](#) Select All Select None

Search Candidates

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

Candidate	Details	Process	Select
Stacey Miller 1 2 3	Vacancy Name: <u>Administrator</u> Application Stage: Invite to interview Registered on: 12/01/2016 Vacancy ID: 11	view  View  contact  Trns  process  rcmnd <b>appoints</b> note e-mail  history  CV  add docs  Checklist  print  Referenc  Edit App	<input type="checkbox"/>

Page: 1 of 1 Go Page size: 1 Change Item 1 to 1 of 1

14. The 'Candidates Appointment' window will appear. Click on the red interview link at the bottom of the screen.

Candidate Appointments

31/01/2016 - 06/02/2016 Day Week Month

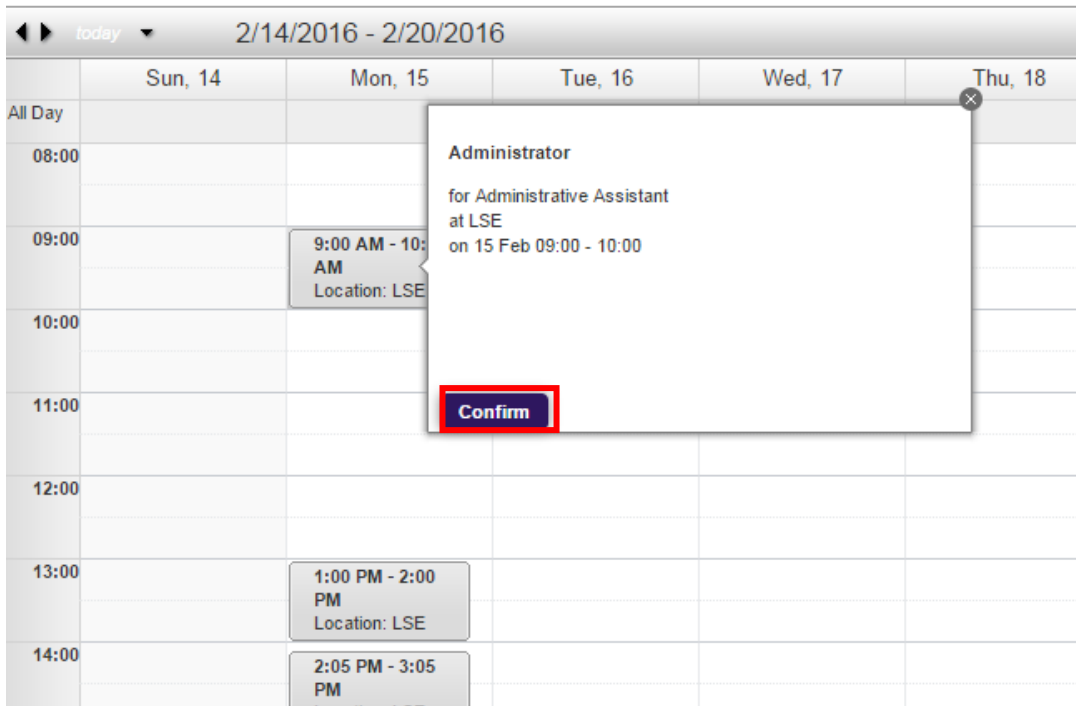
	Sun, 31	Mon, 1	Tue, 2	Wed, 3	Thu, 4	Fri, 5	Sat, 6
all day							
8 am							
10 am							
12 pm							
2 pm							
4 pm							

Show 24 hours...

This candidate has been invited to confirm their availability for the following:

**Administrator**

15. Hover over the slot you have just created and press **'Confirm'**.



16. You will be taken back to the **'Schedules'** screen. To check that the appointment has been changed, click the **'Edit'** icon.

Schedules							
<a href="#">Create schedule with participants</a> <a href="#">Create schedule without participants</a> <a href="#">Create schedule for an event</a>							
Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
Postgraduate Administrator	16/2	16/2	Candidates Confirmed	4	1		
Events manager	8/2	8/2	Candidates Confirmed	6	1		
Course Manager	16/2	25/2	Candidates Confirmed	6	1		
Employer Engagement Adviser Interviews (Feb 2016)	8/2	8/2	Published to Candidates	5	0		
Content Management Administrator	1/2	1/2	Closed	2	1		
Book Manager	1/2	1/2	Closed	2	1		
Administrator	15/2	15/2	Candidates Confirmed	5	1		

17. Click on 'publish to candidates'

select candidates

▼

?

?

SCHEDULING STATUS

Overview

Schedule Details ✓

Create Slots ✓

Review Slots ✓

Select Email Templates ✓

**Publish to Candidates ✓**

Finalise Schedule ✗

Email Correspondence History ✓

Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.

18. You will see that the candidate's interview time has changed to the new slot, and the status is now 'Candidate Confirmed'

Publish To Candidates

See which candidates are available to invite and notify them of the schedule.

To accept an invitation on behalf of the candidate click the email address link and then choose the appointments icon.

Send from system

lsejobs@engageats.co.uk

✓

Send from me

HR1@test.com

□

View:

Show all candidates

▼

Filter by location

Filter by location...

▼

Re-Order:

-- Re-Order candidates --

▼

Appointment date between

and

Publish Schedule

Publish Additional Slots To Candidates

Publish to candidates but don't send emails

□

?

✗ Export Excel Schedule

Print Schedule

Bulk print



	Id	Email Address	Candidate	Vacancy	Status	Appointment Date
□	3500350	sarah@test.com	Sarah Brown	Administrator	Published to candidate	
□	3500377	Steven@test.com	Steven Hudson	Administrator	Published to candidate	
□	3500422	Stacey@test.com	Stacey Miller	Administrator	<b>Candidate Confirmed</b>	15 Feb 09:00 - 10:00 at LSE

19. If you are happy that the slot is correct click the **'finalise schedule'** menu option on the right.

and notify them of the schedule.

appointments icon.

SCHEDULING STATUS	
Overview	
Schedule Details	✓
Create Slots	✓
Review Slots	✓
Select Email Templates	✓
Publish to Candidates	✓
<b>Finalise Schedule</b>	✗
Email Correspondence History	✓

 **Print Schedule**  **Bulk print**

Status	Appointment Date
--------	------------------

*Above is a list of all the stages on the schedule and their associated status. You can click on a link to take you directly to that section.*

20. Click the purple **'Finalise Schedule'** button to send the candidate an email to confirm their interview.

**Finalise Schedule** Send appointment confirmation emails to participants and candidates

Send from system  ☒

Send from me  ☐

Emails an appointment confirmation to participants and candidates

**Finalise Schedule**



21. **Important Note:** Check that you are happy with the email before it goes to the candidate by clicking on the 'select Email Template' menu option and editing the email templates using the red 'edit template' link next to the drop downs.

**Email Details** Set which email templates will be used at each stage of this schedule

Candidate publication notification email	CAND - Invite to 1st Interview (PS)	<a href="#">Edit template</a>
Candidate publication reminder email	SCHEDULE - Candidate Reminder	<a href="#">Edit template</a>
Reminder sent after	2 Day(s)	
Candidate finalise notification email	CAND - 1st Interview Confirmed (PS)	<a href="#">Edit template</a>

22. When you click '**Finalise Schedule**' you will see a pop-up window confirming that the candidates will be sent the emails. Click '**OK**' to proceed.

**Finalise Schedule** Send appointment confirmation emails to participants and candidates

Send from system  ☒

Send from me  ☐

Emails an appointment confirmation to participants and candidates [Finalise Schedule](#)

The page at <https://lsejobs.engageats.co.uk> says: ✕

This will send an email confirming the schedule to candidates and participants.

[OK](#) [Cancel](#)

23. The **'Finalise Schedule'** status on the right will turn to a **'green tick'** showing that the confirmation email has been sent to the candidates.

Participants and candidates		SCHEDULING STATUS
<div>Finalise Schedule</div>	Overview	
	Schedule Details	✓
	Create Slots	✓
	Review Slots	✓
	Select Email Templates	✓
	Publish to Candidates	✓
	Finalise Schedule	✓
	Email Correspondence History	✓

## How to view an interview agenda.

1. Log-in to the system and click on the **'Interviews'** tab at the top of the screen. Find the schedule that you would like to see an agenda for. In this example, we will use the **'Administrator'** schedule. Click the **'Edit'** icon.

**Search Schedules**

Schedule:

Application Stage:

Schedule Type:

Vacancy:

Status:

**Schedules**

Create schedule with participants  Create schedule without participants  Create schedule for an event

Schedule	Start	End	Status	Total Slots	Cands	Edit	Del
Postgraduate Administrator <input type="button" value="i"/>	16/2	16/2	Candidates Confirmed	4	1	<input type="button" value="pencil"/>	<input type="button" value="x"/>
Events manager <input type="button" value="i"/>	8/2	8/2	Candidates Confirmed	6	1	<input type="button" value="pencil"/>	<input type="button" value="x"/>
Course Manager <input type="button" value="i"/>	16/2	25/2	Candidates Confirmed	6	1	<input type="button" value="pencil"/>	<input type="button" value="x"/>
Employer Engagement Adviser Interviews (Feb 2016)	8/2	8/2	Published to Candidates	5	0	<input type="button" value="pencil"/>	<input type="button" value="x"/>
Content Management Administrator	1/2	1/2	Closed	2	1	<input type="button" value="pencil"/>	<input type="button" value="x"/>
<b>Administrator</b>	1/2	1/2	Closed	2	1	<input type="button" value="pencil"/>	<input type="button" value="x"/>
Administrator	15/2	15/2	Finalised	5	3	<input type="button" value="pencil"/>	<input type="button" value="x"/>

2. Click the **'Publish to Candidates'** menu option on the right of the screen.

Set the schedule name and the criteria that will be used to select candidates

Administrator

Administrator

Invite to interview

Administrator

☐ only for me ☒ for everyone

0 candidates accepted 0 candidates

**SCHEDULING STATUS**

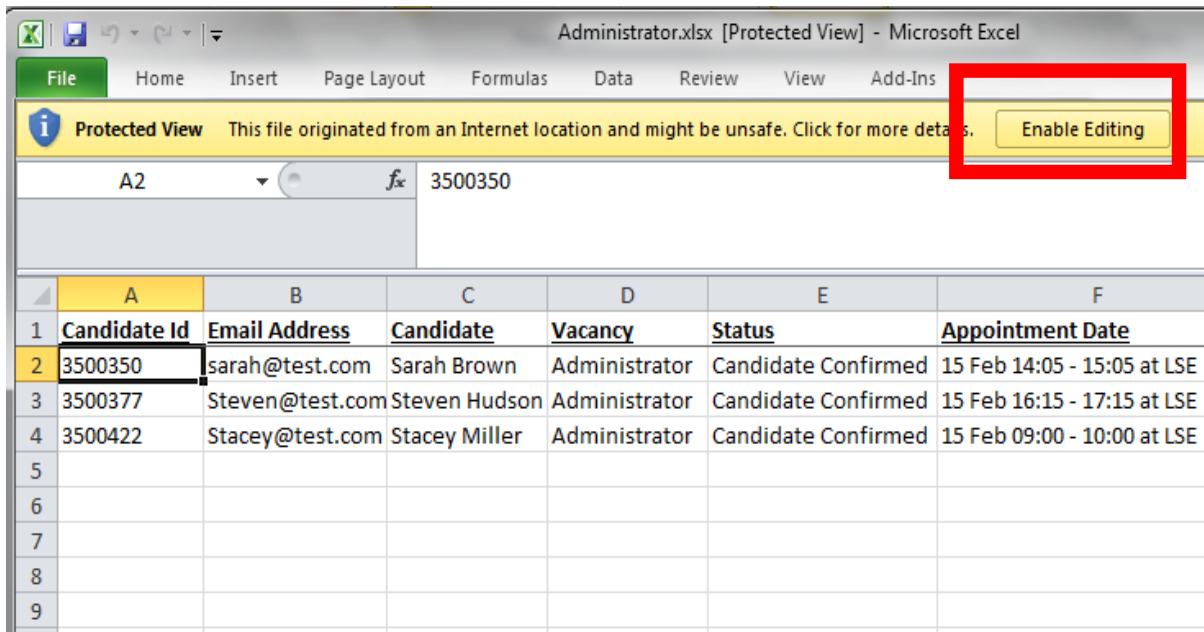
- Overview
- Schedule Details ☒
- Create Slots ☒
- Review Slots ☒
- Select Email Templates ☒
- Publish to Candidates ☒**
- Finalise Schedule ☒
- Email Correspondence History ☒

3. Click on the **'Export Excel Schedule'** link to download the Excel file.

Publish to candidates but don't send emails ☐

	ID	Email Address	Candidate	Vacancy	Status	Appointment Date
<input type="checkbox"/>	3500350	sarah@test.com	Sarah Brown	Administrator	Candidate Confirmed	15 Feb 14:05 - 15:05 at LSE
<input type="checkbox"/>	3500377	Steven@test.com	Steven Hudson	Administrator	Candidate Confirmed	15 Feb 16:15 - 17:15 at LSE
<input type="checkbox"/>	3500422	Stacey@test.com	Stacey Miller	Administrator	Candidate Confirmed	15 Feb 09:00 - 10:00 at LSE

- Open the file and you will see a spreadsheet of the candidate's names and the interview times. Click '**Enable Editing**' if you would like to edit or amend the schedule – for example, to include a pre-meeting or a discussion.



Administrator.xlsx [Protected View] - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins

**Protected View** This file originated from an Internet location and might be unsafe. Click for more details. **Enable Editing**

A2 fx 3500350

	A	B	C	D	E	F
1	<u>Candidate Id</u>	<u>Email Address</u>	<u>Candidate</u>	<u>Vacancy</u>	<u>Status</u>	<u>Appointment Date</u>
2	3500350	sarah@test.com	Sarah Brown	Administrator	Candidate Confirmed	15 Feb 14:05 - 15:05 at LSE
3	3500377	Steven@test.com	Steven Hudson	Administrator	Candidate Confirmed	15 Feb 16:15 - 17:15 at LSE
4	3500422	Stacey@test.com	Stacey Miller	Administrator	Candidate Confirmed	15 Feb 09:00 - 10:00 at LSE
5						
6						
7						
8						
9						

- You can either save the file, send it to the panel by email or print it if you wish to do so.