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Managing Candidate Profiles

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Each candidate's profile information can be managed and edited by utilizing the action toolbar in the candidate list.Â To manage candidates, begin by selecting the desired student population:Â Â Â **Selecting Candidates:** To select candidates individually, click to check the box next to the candidate's name from the Candidate File list. To view the selected candidates, click on the Selected tab. To select a batch of candidates from the All, Matched, or Selected tabs, hover over the word Select, located to the left of the Name column at the top of the Candidate File list.Â Selection choices include: Select Page Select All Deselect Page Deselect All To view the selected candidates, click on the Selected tab. Additionally, any candidate lists resulting from a search can also be managed through the action toolbar.Â Candidates that match current search criteria will automatically populate in the Selected tab.Â

Exporting Candidate Data *[Back to Top](#)*

- To export candidate data, begin by selecting a group of candidates from the Candidate File.Â Once the candidate population has been defined, click on the export icon from the All, Matched, or Selected tabs.Â A pop up window displays.Â Select which data to export from the â€œSelect data to exportâ€• box.Â Then select a preferred export format (CSV or HR-XML), and click on the Export button.Â At the next page, click on the â€œDownload hr-xml exportâ€• or â€œDownload text resumeâ€• button (depending on which file type is selected).Â Â Â Â Â
- When exporting to a CSV file, you will have the option to export the candidate notes. When exporting notes, you will have the option to export theÂ 'Note Text', 'Note Date', and 'Note Posted By'.

Adding Candidate Notes*[Back to Top](#)*

- To add a note to an **individual** candidate from the Candidate File, click on the candidate's name to open the candidate's profile.Â Then click on â€œAdd Notesâ€• icon.Â To add a note to a **batch**of candidates from the Candidate File, click on the All, Matched, or Selected tabs, and then click on the

â€œAdd Notesâ€• icon in the action toolbar.Â Draft the note in the pop-up window, select Admin Note Visibility, and click the Add Note button.
  - Public/Shared- To share a note with other Admin users, select Public/Shared from the â€œAdmin Note Visibilityâ€• drop-down menu.Â
  - Personal Note- To keep a note confidential, select â€œPersonal Noteâ€• from the â€œAdmin Note Visibilityâ€• drop-down menu.
- From the Candidate File, a note icon will appear next to each candidate's name after a note is added to their candidate profile.Â To view existing notes, click the â€œNotesâ€• icon.Â All existing notes will be listed by date and user at the bottom of the Notes screen under â€œPrevious Notes.â€•Â If multiple notes exist, select to filter by â€œMy Notesâ€• or â€œAll Public Notes from the â€œFilter Notesâ€• drop-down menu.

Emailing Candidates *Back to Top*

- To email candidates, begin by selecting a group of candidates from the Candidate File.Â To email an **individual** candidate from the Candidate File, click on the candidate's name to open the candidate's profile.Â To email a **batch** of candidates from the Candidate File, click on the All, Matched, or Selected tabs, and then click on the â€œEmailâ€• icon in the action toolbar.Â Draft the email, and then click on the Send button to send the email to the selected candidates.Â

Forwarding Resumes to a Colleague *Back to Top*

- Forward a resume to a colleague â€“ from the main candidate grid, click on the candidate's name, click on the â€œForwardâ€• icon from the action toolbar. Â Enter the recipient's email address and a subject. Â Draft the email, and then click â€œSendâ€•.
- Forward a batch of resumes to a colleague â€“ to forward a batch of resumes to a colleague, click on the â€œForward' icon from the All, Matched, or Selected tabs. Â Enter the recipient's email address and a subject. Â Draft the email, and then click â€œSendâ€•.

Printing Resumes *Back to Top*

- Print a single resume â€“ from the main candidate grid page, click on the candidate's name, then click on the resume tab. Â From there, click on the â€œPrint PDF Resumeâ€• icon from the action toolbar.Â The candidate's resume will appear in a PDF window. Â Click print in your browser.
- Batch Print resumes â€“ from the All, Matched, or Selected tabs, click the â€œPrint Resumeâ€• icon. The candidate's resumes will appear in a PDF window. Â From the pop up box, click print in your browser.

Changing Resume Book Status *Back to Top*

- Resume Book Status' are as follows:
- Active = (viewable to employers) candidates may choose this status to opt into the resume database.
- Inactive = (not viewable to employers) candidates may choose this status to opt out of the resume database.
- Declined = (not viewable to employers) this is an admin only status and may be used by your office any way you see fit. An email template can be turned on for an automatic email to go out, if desired.
- Archived = (not viewable to employers) this is an admin only status and may be used by your office any way you see fit.
- Changing the Resume Book Status for a candidate â€“ from the main candidate grid page, click on the

candidate's name. Â You will see a drop-down menu on the right called â€œResume Book Statusâ€•. Â Select the appropriate status for the candidate.Â
- Changing the Resume Book Status in a Batch â€“ from the All, Matched, or Selected tabs, you can click on the Change Book Status Icon.Â Select the appropriate status you want to give to the batch, and click Save.

Adding a Candidate *Back to Top*

- Adding a Candidate â€“ Click on the green plus icon from the All, Matched, and Selected tabs.Â Enter the candidate's email address.Â Click search. Â If no address is found matching that email address, enter the First Name, Last Name, Username, and Password. Â Then click â€œSaveâ€•.Â
- If the email address is found, you will receive this message, â€œCandidate already has a profile for this program and cannot be createdâ€•.Â Use one of the options below to proceed.Â Click â€œCreate Profileâ€• to add.

Deleting a Candidate *Back to Top*

- Deleting a Candidate â€“ from the main candidate grid page, click on the candidate's name, and then click on â€œDelete Candidateâ€• icon.Â If a candidate has applied to a job, or has search transactions on file, they may not be able to be deleted.Â In this case, you should archive or decline these candidates.

Saving Candidates to a folder *Back to Top*

- Saving a batch of candidates to a folder â€“ from the Selected tab, click the â€œSaveâ€• icon from the action toolbar.Â Add them to â€œMy Candidatesâ€• folder or create a new folder.

Sign in as Candidate *Back to Top*

- From the main candidate list page, click on the candidate's name.
    - If the school uses the sign in as candidate on the grid, select the sign in as icon
- From the main candidate list page, click on the candidate's name on the grid.
- In the upper right hand corner there is a â€œSign in as a Candidateâ€• link.Â Click on this link and you will be able to see the system from that particular candidate's view.

When signing in as a candidate, GradLeaders Career Center Admins will not see the option to change the candidate's password under Login Info. To manage a candidate's account information, GradLeaders Career CenterÂ Admins are to use the Admin Module.

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