



THOMSON REUTERS



cvMail  
Scheduler  
STANDARD USER GUIDE

e-Recruitment Solutions

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## REVISION HISTORY

Name	Date	Version	Summary of changes
Ramneek Kaur	25/10/2012	V1.0	Document Modified
Rebecca Swan	19/11/2013	V2.0	Document Updated
Rebecca Swan	11/08/2014	V3.0	Document Updated

## ABOUT THIS DOCUMENT

### INTENDED READERSHIP

This guide is designed to assist with the navigation and use of cvmail FSR.

The level of security access assigned to a new user (client) can vary depending on the database setup; therefore this document *must be edited* to reflect the workflow of the organisation and the internal practices that must be followed.

### IN THIS GUIDE

This guide assumes that the Client user has security access to:

- *Create interview timeslots & events*
- *Invite/allocate candidates to timeslots/events*
- *Configuring active jobs to work with scheduler*
- *Basic understanding of scheduler reports*
- *Manage email templates*

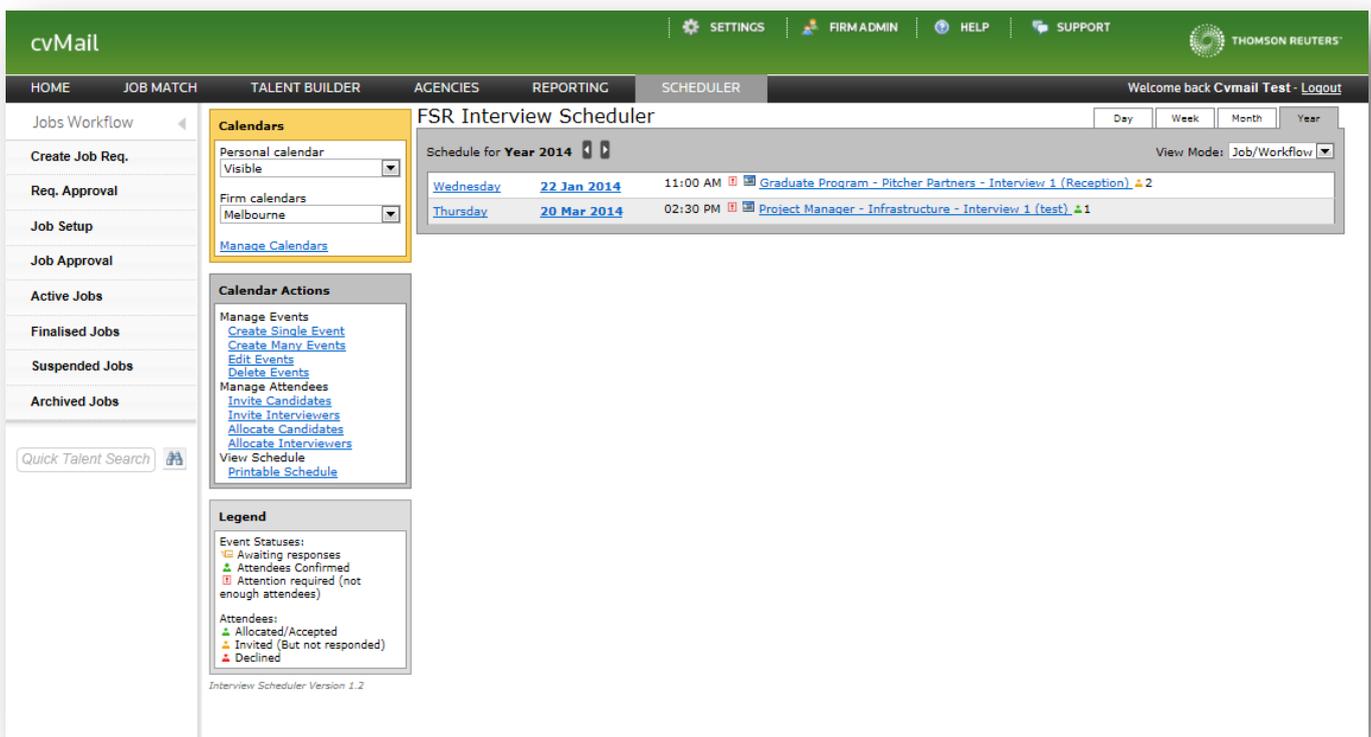
# CHAPTER 1: WHAT IS THE SCHEDULER?

The scheduler in cvMail FSR allows users to set up and manage interview slots and arrange interviews for candidates.

The scheduler works on the concept of managing separate events for chosen work units, e.g. interview rounds, jobs, job divisions, interviewers, etc. Users can achieve this by dedicating a separate *calendar* to each chosen work unit that they wish to manage. E.g. create a new calendar each time you create a job that will run interviews, or each time a new interviewer comes on board, or for each job division in the organisation.

The scheduler is capable of managing typical interview processes including the large numbers of candidates involved in graduate recruitment. Combine information regarding the following constituents into scheduled events in each calendar.

- ✓ *Job:* Associate each event in the calendar with a particular job and workflow stage in the system.
- ✓ *Interviewer availability:* Obtain interviewers' availability schedule offline and then create corresponding events in the calendar.
- ✓ *Applicable candidates:* Schedule candidates into interviews in a few different ways.



The screenshot displays the 'cvMail' interface for the 'FSR Interview Scheduler'. The top navigation bar includes 'HOME', 'JOB MATCH', 'TALENT BUILDER', 'AGENCIES', 'REPORTING', 'SCHEDULER', and 'Welcome back Cvmail Test - Logout'. The left sidebar contains a 'Jobs Workflow' menu with options: 'Create Job Req.', 'Req. Approval', 'Job Setup', 'Job Approval', 'Active Jobs', 'Finalised Jobs', 'Suspended Jobs', and 'Archived Jobs'. The main content area is titled 'FSR Interview Scheduler' and shows a calendar for the year 2014. Two events are listed:

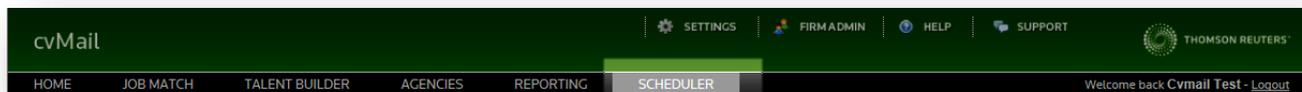
Day	Date	Time	Event Name	Count
Wednesday	22 Jan 2014	11:00 AM	Graduate Program - Pitcher Partners - Interview 1 (Reception)	2
Thursday	20 Mar 2014	02:30 PM	Project Manager - Infrastructure - Interview 1 (test)	1

The interface also includes sections for 'Calendar Actions' (Manage Events: Create Single Event, Create Many Events, Edit Events, Delete Events; Manage Attendees: Invite Candidates, Invite Interviewers, Allocate Candidates, Allocate Interviewers), a 'Legend' for event statuses (Awaiting responses, Attendees Confirmed, Attention required) and attendees (Allocated/Accepted, Invited, Declined), and a 'Quick Talent Search' button.

## CHAPTER 2: USING THE SCHEDULER

### 2.1 OVERVIEW

Access the scheduler by clicking on the *Scheduler* link in *My Workbench*.

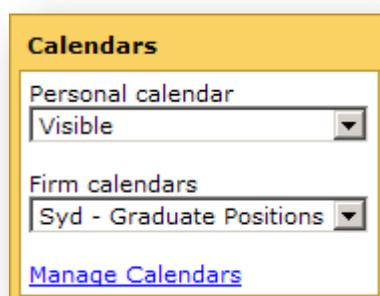


1. Create a calendar each time a new work unit occurs or is applicable, e.g. start of a new graduate process, induction of a new interviewer, or event.
  - Use *Manage Calendars | Add Calendar*.

*It is important to manage calendars carefully, because most batch actions, e.g. manage events, invite/allocate attendees, print schedule work off the active calendar only.*

2. Create events in the calendar based on availability of interviewers and other required resources, e.g. locations and set up interview or event times in the calendar.
  - Use *Create Single Event* for individual interviews.
  - Use *Create Many Events* for batch creation of interview slots to offer multiple candidates for self-scheduling.
3. Invite/allocate interviewers and candidates to attend interviews.
  - For single events, click the event and use *Attendees | Invite/Allocate*
  - For multiple events, use *Invite/Allocate candidates/interviewers*
4. Monitor responses: Attendees fill up the events as interviewers accept invitations and candidates self-schedule interview slots.
  - See event *Attendees* and the *Status* column in the particular jobs' application listing.

Use the *Calendars* section on the left-hand side to create a separate calendar for each work unit that you wish to manage in the scheduler.

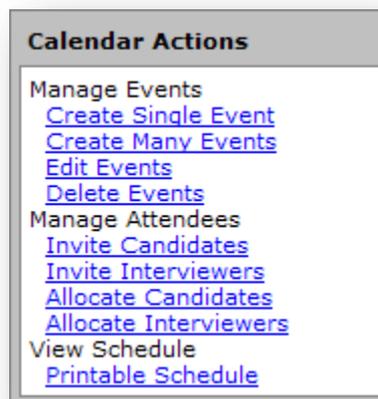


The *Personal Calendar* contains events that the current user is invited/allocated to. For more information refer to *Personal Calendar* in this user guide.

- ✓ Select a calendar to manage events in it. This displays all of the existing events in that calendar for the current week in the main section on the right-hand side. The particular calendar is now the active calendar for the Calendar Actions menu.
- ✓ Click Day, Week, Month or Year in the upper right-hand corner to change the period of the display.
  - Use the left/right buttons in the blue title bar to view the previous/next period respectively.
- ✓ Change the View on the right-hand side (drop-down menu) to display job/workflow details or attendees for each event.
- ✓ Click on any listed day or date to display the Day view for that date.
- ✓ Click on any listed event title to edit the details or attendees for that event.

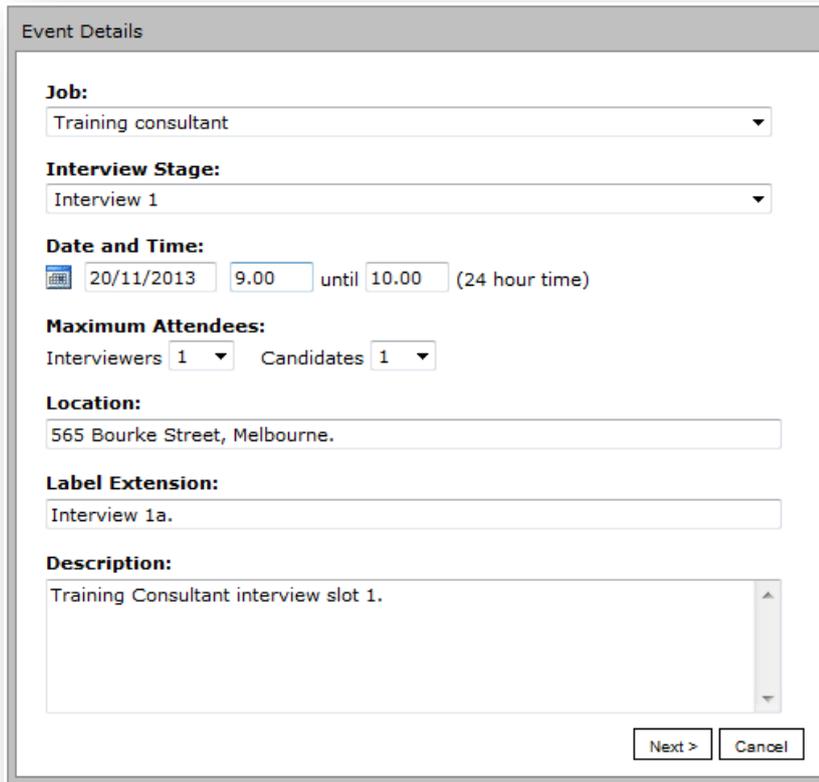
## Calendar Actions

The available Calendar Actions operate on events in the active calendar, selected in the *Calendars* section described above.



## 2.2 CREATE A SINGLE EVENT

- ✓ **Job:** *Active Jobs* only
- ✓ **Interview Stage:** Auto-updates with a list of the interviews stages in the selected job
- ✓ **Date and Time:** Specify time in the same time zone as the particular calendar's time zone
- ✓ **Attendees:** The system will not allow users to allocate more attendees than specified
- ✓ **Location:** Simple text information about the event
- ✓ **Label Extension:** Displays along with the event title in the calendar



**Event Details**

**Job:**  
Training consultant

**Interview Stage:**  
Interview 1

**Date and Time:**  
20/11/2013 9.00 until 10.00 (24 hour time)

**Maximum Attendees:**  
Interviewers 1 Candidates 1

**Location:**  
565 Bourke Street, Melbourne.

**Label Extension:**  
Interview 1a.

**Description:**  
Training Consultant interview slot 1.

Next > Cancel

1. Choose the **job** you want to create the calendar event for
2. Select the **interview stage** that contains the candidate you want to invite to the event

### Note

The folder choices here directly relate to your Workflow stages in the job. So the candidates you have moved to the specified "interview" folder in the workflow will be available here.

3. Choose a **date and time** for the event
4. Choose the number of **Interviewers** for the event (if applicable)
5. Choose the maximum number of **candidates** that can be allocated to the event (for example – 1 interviewer, 1 candidate to be interviewed)
6. Enter the **location** of the event (if known)
7. Enter any additional descriptive text relating to the event in **Label Extension**
8. Enter a description of the event (if applicable)
9. Click "next".

Your event details screen will appear, with the information you have just entered.

10. If the event information is correct, click "**Create Event**".
11. If the event information needs to be reviewed, click "<Previous" and adjust.

Confirm

---

**Event Details**

Event: Training consultant - Interview 1 (Interview 1a.)

Date: 20 Nov 2013

Time: 09:09 AM - 10:10 AM

Location: 565 Bourke Street, Melbourne.

Description: Training Consultant interview slot 1.

## 2.2.1. Create Many Events

Create multiple independent events with similar attributes and then customise the events individually if required. This is useful in two situations.

1. A batch of interviews for a particular job, e.g. a week of interviews for a graduate process
2. A regular occurrence of interviewers' availability, e.g. 15:00-17:00 every day for two weeks

The event template includes the common attributes that can be left empty if they are expected to be filled in later, for individual events.

The batch schedule specifies the timing and number of interviews to create appropriate events. Specify the date and time for the event in the same time zone as the particular calendar's time zone.

The system uses the information entered to calculate the schedule as follows.

- **Start Date:** Create the first interview on this date
- **Daily Hours:** Create interviews between these times on consecutive weekdays
- **No. of Interviews:** The total number of interview slots to create
- **Interview Duration:** Time span for each interview. All interviews in the batch must be the same length of time
- **Time Between Interviews:** Wrap-up time, etc. to place in between interviews to space them
- **Number of Parallel Interviews:** If resources permit, run more than one interview in parallel, to schedule the same number of interviews in fewer days

**Schedule Creation Parameters**

**Start Date**

**Daily Hours**  
 until

**Number of Interviews**

**Interview Duration (mins)**

**Time Between Interviews (mins)**

**Number of Interviews in parallel**

In order to exclude a mid-day break, first schedule the morning interviews and then schedule afternoon interviews. E.g. first schedule 43% of interviews between 09:00-12:00 (3 hours) and then schedule the remaining 57% of interviews between 13:00-17:00 (4 hours).

Batch interviews get automatic *Label Extensions* "1 a", etc. where the number denotes consecutive interview times and the alphabet denotes interview slots in parallel (at the same time).

### Event Template

Job: Syd - Graduate Positions (Interview 1)  
Minimum Interviewers: 1  
Minimum Candidates: 1  
Location: Headoffice  
Description:

### Batch Schedule

#### Monday Apr 09, 2007

1. 09:00 AM - 12:00 PM Event 1a
2. 13:30 PM - 16:30 PM Event 2a

#### Tuesday Apr 10, 2007

3. 09:00 AM - 12:00 PM Event 3a
4. 13:30 PM - 16:30 PM Event 4a

#### Wednesday Apr 11, 2007

5. 09:00 AM - 12:00 PM Event 5a
6. 13:30 PM - 16:30 PM Event 6a

#### Thursday Apr 12, 2007

7. 09:00 AM - 12:00 PM Event 7a
8. 13:30 PM - 16:30 PM Event 8a

### Confirm and Create Batch

## 2.2.2. Edit and Delete Events

Click on any single event in the calendar to Edit/Delete it.

Use the links in the *Calendar Actions* section to edit/delete multiple events. First filter all of the existing events in the active calendar by job, interview stage, interviewer and/or date. This displays a list of filtered events, which can be short-listed further if required.

When editing multiple events, note that all of the selected events will update to the specified attribute values, even if they were previously different to each other.

**Edit Selected Events**

Choose the fields you want to update for the selected events.

**Change the Job and/or Workflow Stage**  
Warning: Changing the job or workflow stage will remove all attendees and invitations.  
**Job:**  
  
**Interview Stage:**

**Change the Number of Interviewers required**

**Change the Number of Candidates required**

**Change the Location**

**Change the Description**

Tick individual options to expand each section and enter new information for all short-listed events.

## CHAPTER 3: INVITES

After setting up some/all intended events, users can schedule tentative (invited) or confirmed (allocated) attendees in each event. The status of the event and attendees is indicated by small graphic icons, which are described in a legend near the lower left-hand corner of the screen.

Click on any event in the calendar and click the *Attendees* tab to schedule in interviewers and interviewees to the event.

Interviewees can be existing FSGR users or any independent contact. For more information, see *Interviewer Address Book* in this user guide.

### 3.1.1. Invite Interviewers/Candidates and Notification

Click the *Invite* button to invite interviewers to conduct interviews by sending them an e-mail containing a link to return their preference. The interviewer can conveniently click the link in the e-mail to view the interview details and *Accept/Decline* the offered interview slots.



### Invite FSGR users and/or non-FSGR users to conduct interviews

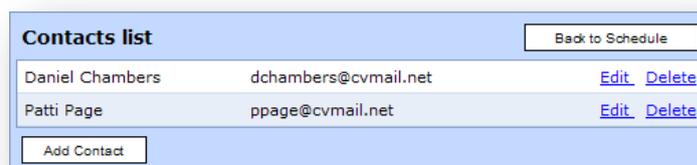
Click the *Invite* button to invite candidates to attend interviews by sending them an e-mail containing a link to return their preference. This is useful for bulk interviews, to allow candidates to select a convenient time from a batch of interview slots for a single interview round.

In situations where the user does not wish to notify the attendee, tick the 'Skip e-mail' option to bypass the notification e-mail. This is useful in situations such as the following,

- A candidate makes a telephone request to change their interview time
- The organisation uses a separate booking software system

### 3.1.2. Interviewer Address Book

Interviewees can be existing FSGR users or any independent contact. Use the *Manage Contacts* link in the *Interviewer Address Book* section to add/edit/delete contacts. Enter a *First Name*, *Last Name* and *E-mail Address* to save a non-FSGR user.



### 3.1.3. Allocate Interviewers/Candidates and Notification

Instead of inviting attendees, *allocate* interviewers and candidates to interviews and notify the recipient of the scheduled interview time(s). This gives the recipients no choice to decline. This is useful for candidates who do not have a log-in account on the organisation's job board, e.g. paper applications and is available for interviewers also.

---

Dear Hugh Gordon, ← **SALUTATIO**

Please click the link below to confirm your interview time. ← **BODY**

You have been invited to attend the following events:

-----

09 Apr 2007 - Syd - Graduate Positions  
Time: 10:00 AM - 10:30 AM  
Location: Headoffice  
-----

Please click on the following link to respond:  
<http://10.180.2.199/fullspectrum/scheduler/actions/interviewerResponse.cfm?RAK=BF2EB4D7-EA65-EBB8-3EFD87019DC24043> ← **AUTOMATIC**

For more information please contact r.recruiter@cvmail.net. ← **FOOTER**

Reggie Recruiter ← **SIGNATUR**

Sample invitation to interview e-mail to interviewer

---

Dear Mr. John Doe,

Please click the link below to confirm your interview time.

Please click on the following link to respond:  
<http://10.180.2.199/fullspectrum/scheduler/actions/candidateResponse.cfm?RAK=BF2FA0AE-EA65-EBB8-3E918C9D96CC810C>

For more information please contact r.recruiter@cvmail.net.

Reggie Recruiter

Sample invitation to interview e-mail to candidate

Dear Hugh Gordon,

Please click the link below to confirm your interview time.

You have been scheduled for the following events:

-----  
09 Apr 2007 - Syd - Graduate Positions  
Time: 10:00 AM - 10:30 AM  
Location: Headoffice  
-----

Please click on the following link to view your full schedule:  
[http://10.180.2.199/fullspectrum/scheduler/actions/interviewerViewSchedule.cfm?  
RAK=BF3AE93B-EA65-EBB8-356AAEEC8301DA08](http://10.180.2.199/fullspectrum/scheduler/actions/interviewerViewSchedule.cfm?RAK=BF3AE93B-EA65-EBB8-356AAEEC8301DA08)

For more information please contact r.recruiter@cvmail.net.

Reggie Recruiter

Sample allocation to interview e-mail to interviewer

Dear Mr. John Doe,

Please click the link below to confirm your interview time.

You have been scheduled for the following event:

-----  
09 Apr 2007 - Syd - Graduate Positions  
Time: 10:00 AM - 10:30 AM  
Location: Headoffice  
-----

Please click on the following link to view your full schedule:  
[http://10.180.2.199/fullspectrum/scheduler/actions/candidateViewSchedule.cfm?  
RAK=BF420F3F-EA65-EBB8-31BDE328062AC932](http://10.180.2.199/fullspectrum/scheduler/actions/candidateViewSchedule.cfm?RAK=BF420F3F-EA65-EBB8-31BDE328062AC932)

For more information please contact r.recruiter@cvmail.net.

Reggie Recruiter

Sample allocation to interview e-mail to candidate

### 3.1.4. Reschedule Interviewers/Candidates

Individual attendees may communicate issues with their allocated interviews and request rescheduling. Open the relevant event and click the *Attendees* tab to display a summary of attendees in the particular event.

Event Details

Attendees

**Manage Attendees**

**Interviewers (1 required)** Invite Allocate

---

Allocations 1 more interviewers required

---

Invitations 👤 Tom Arnold ✕

Pending

---

Invitations Declined

**Candidates (1 required)** Invite Allocate

---

Allocations 👤 Mr. Nick R Turner ✕

All Candidate slots filled.

---

Invitations Pending

---

Invitations Declined

Back

#### Invite/allocate attendees to a single event

The following statuses apply for interviewers and candidates.

- Allocated: Attendee accepted an invitation or was manually allocated by a user
- Invitations Pending: Attendee was sent an invitation and has not yet accepted or declined
- Invitations Declined: Attendee was sent an invitation and has declined

Remove attendees from the event by clicking the 'X' button for the particular interviewer/candidate. Reschedule attendees by inviting/allocating them to other interview times as described above.

### 3.1.5. E-mail Templates

The system allows templates for all of the e-mail notifications mentioned above. Create/edit/delete these in the *E-mail Templates* section in *Firm Administration*. The system inserts the invitation links in between the e-mail body and footer. The scheduler uses the following e-mail template types.

1. Candidate – Invitation to Interview
2. Candidate – Allocated Interview Time
3. Interviewer – Invitation to Interview
4. Interviewer – Allocated Interview Time

## CHAPTER 4: MONITOR RESPONSES

Each event in the calendar has graphic icons indicating the status of the event and attendees. These icons are described in the *Legend* near the lower left-hand corner of the screen.

### 4.1.1. Candidate Responses

When candidates log into the organisation's job board, they see the available interview slots and can confirm one time slot for each interview. When candidates self-schedule their interview slots, those interview slots do not appear to other candidates who try to self-schedule an interview slot thereafter. If two candidates attempt to self-schedule the same interview slot, the second candidate will see a message that the particular interview slot is no longer available and the screen will refresh with an updated list of available interview times.

Candidates can self-schedule interview slots up to 5 hours before the particular interview. Scheduled interviews are available for future reference in the candidate's job board log-in account, under *Interviews*.

Candidates who do not have a log-in account on the job board can click the link in the invitation e-mail and confirm their preference in their Internet browser.

**Syd - Graduate Positions (Interview 1)**

Please select your preferred time below:

---

Event:            Syd - Graduate Positions (Interview 1) - 3a  
Date:                Tuesday, 10/04/2007  
Time:                09:00 AM - 12:00 PM  
Location:           Headoffice  
Description:

---

Event:            Syd - Graduate Positions (Interview 1) - 4a  
Date:                Tuesday, 10/04/2007  
Time:                01:30 PM - 04:30 PM  
Location:           Headoffice  
Description:

---

Event:            Syd - Graduate Positions (Interview 1) - 5a  
Date:                Wednesday, 11/04/2007  
Time:                09:00 AM - 12:00 PM  
Location:           Headoffice  
Description:

---

Event:            Syd - Graduate Positions (Interview 1) - 6a  
Date:                Wednesday, 11/04/2007  
Time:                01:30 PM - 04:30 PM  
Location:           Headoffice  
Description:

---

**Candidate view to self-schedule one interview slot for this round of interviews**

The status of applications in the application listings in the *Active Jobs* section updates according to the actions in scheduler.

- **Invited:** Candidate has an interview invitation(s) pending their action.
- **Allocated:** Candidate has accepted an interview invitation or was allocated to an interview.
- **Declined:** Candidate has declined all interview invitations offered to them.

Each action, e.g. invitation, allocation, self-allocation that involves a candidate is logged as an independent event in the application event log.

#### 4.1.2. Interviewer Responses

Non-FSGR users can conveniently click the link in the e-mail to view the interview details and *Accept/Decline* the offered interview slots.

**Invitation to Event**

Event: Syd - Graduate Positions - Interview 1 (3a)  
 Date: Tuesday, April 10, 2007  
 Time: 09:00 AM - 12:00 PM  
 Location: Headoffice  
 Description:

---

**How do you want to respond to this invitation?**

#### Non-FSGR interviewer view of interview invitation from e-mail link

#### 4.1.3. Personal Calendar

When the current FSGR user is invited/allocated to an event, this creates a copy of the event in their *Personal Calendar*, accessible in the *Calendars* section.

- Pending invitations display in red.
- Accepted invitations display in green.
- Declined invitations disappear from the calendar.

FSGR users will also see interview invitations separately in the FSR scheduler screen.

**Invitations**

 [Syd - Graduate Positions - Interview 1 \(3a\)](#)  
[10 Apr 07 01:45 PM](#)

#### FSGR interviewer view of interview invitation in the scheduler

## CHAPTER 5: RECORD RESULTS

Save results of interviews and notes on candidate performance in the actual application, which can be viewed via the job listing.

Use *Additional Options* in the *Job Setup* menu to add custom codes to each application in the job. This is useful for rating candidate performance in specific aspects of the interview, e.g. Technical Knowledge 1-5.

Use *Standard Data* in *Firm Administration* to add custom codes to all talent records in the system. This is useful for rating more generic candidate performance that is not specific to the job, e.g. Confidence 1-5, Company Culture Fit 1-5..

Use talent record notes to save more information about interview performance as free text.

### 5.1 EXPORT SCHEDULES

Click the *Printable Schedule* link to export any set of scheduled data in the active calendar. First filter all of the existing events in the active calendar by job, interview stage, interviewer and/or date. This displays a list of filtered events, which can be short-listed further if required. Click *Next* to display a printable schedule of the short-listed events. Copy the output and paste it in a spreadsheet software for advanced processing, e.g. sorting columns, etc.

Date	Start Time	End Time	Event	Interviewers	Candidates
Monday 09 Apr 2007	10:00 AM	01:00 PM	Syd - Graduate Positions - Interview 1 (1a)		
Monday 09 Apr 2007	02:30 PM	05:30 PM	Syd - Graduate Positions - Interview 1 (2a)		
Tuesday 10 Apr 2007	10:00 AM	01:00 PM	Syd - Graduate Positions - Interview 1 (3a)		Nick R Turner
Tuesday 10 Apr 2007	02:30 PM	05:30 PM	Syd - Graduate Positions - Interview 1 (4a)	Luke Anderson	Carren L Norwood
Wednesday 11 Apr 2007	10:00 AM	01:00 PM	Syd - Graduate Positions - Interview 1 (5a)		
Wednesday 11 Apr 2007	02:30 PM	05:30 PM	Syd - Graduate Positions - Interview 1 (6a)		
Thursday 12 Apr 2007	10:00 AM	01:00 PM	Syd - Graduate Positions - Interview 1 (7a)		
Thursday 12 Apr 2007	02:30 PM	05:30 PM	Syd - Graduate Positions - Interview 1 (8a)		

#### Sample export of the events displayed

### 5.2 SEPARATE INTERVIEW ROUNDS

The system supports scheduling separate rounds of interviews for each job. This concept builds on the *workflow stages* that are used for organising applications in each job.

Set up second/third round interviews as described above and once candidates progress to the next stages, invite/allocate attendees to the latter round events as described above. In order to bypass this delay in scheduling invitees, either use separate folders in the same workflow stage, or move candidates to the next stages even before their interviews are complete.