Shortlisting Complete Button & Notifications

Shortlisting Complete Button & Notifications User Guide

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Background

Some recruitment campaigns generate very high volumes of applications resulting in shortlisting processes taking place over a number of days.

Introducing a shortlisting complete button allows the shortlister to control when the 'shortlisting complete' notification email is sent to relevant system users in order to prompt the next stage in the recruitment journey.

Similar notifications can be configured using System Alerts functionality which is based on all application status updates made that day. The Shortlisting Complete functionality has been introduced to provide an alternative method of notification where shortlisting may take place over multiple days. Further information about System Alert notifications can be found in our System Settings guide.
What does the Shortlisting Complete button do?

The Shortlisting Complete button sends an instant email notification to system users who have access to that job advising that shortlisting has now been completed. This then prompts the next stage in the recruitment process.

Shortlisting Complete Checks

There are a number of checks to ensure that the shortlisting complete notification is only triggered at the appropriate point in the recruitment process.

The shortlisting complete button will only appear:

- For system users with a security role configured to display the button (typically shortlister or hiring manager security profiles).
- If 'Live for Candidates' is set to No. So the job is not open to candidate applications (i.e. the job is not advertised).

The email notification can only be generated:
Once all application statuses have been updated following shortlisting (which application statuses this corresponds to can be configured in Settings > Security Roles).

If a user attempts to send the Shortlisting Complete notification whilst there are still applications at shortlisting statuses, an on-screen error message will display, indicating why shortlisting cannot be marked as complete:

**Shortlisting Complete**

Cannot mark shortlisting as complete - 1 candidate(s) still needs shortlisting

Once the shortlisting complete email notification has successfully been triggered, an on-screen message will indicate that this has been generated successfully:

**Shortlisting Complete**

Shortlisting complete - email sent to 1 users

**Who gets the Shortlisting Complete Email Notification?**

The Shortlisting Complete email notification is sent immediately to system users added to the Job Access tab for that job, where the Shortlisting Complete notification is enabled for their security role.
Creating the 'Shortlisting Complete' Email

A 'Shortlisting Complete' email can be created in Communications.

Merge fields which relate to the job or system user will successfully merge into the Shortlisting Complete email, however as this is a generic email relating to all candidates that have been shortlisted candidate merge fields will not be operational.

From System Settings > System Customisation, the appropriate email to trigger once the Shortlisting Complete button can then be connected.
Enabling the 'Shortlisting Complete' button for a Security Role

Whether the shortlisting complete button appears for users or not can be configured in Security Roles.

To enable the shortlisting complete button, in Settings > Security Roles edit the security role required, and on the Jobs & Talent Pools tab, select the 'Access' checkbox against the 'List Candidate – Shortlisting Complete' option.

Enabling the 'Shortlisting Complete' email notification for a Security Role

Whether users added into the Job Access tab for the job receive the shortlisting email notification or not can be configured in Security Roles.

To enable the shortlisting email notification, in Settings > Security Roles edit the security role required, and on the Create / Update Jobs tab, set 'Send shortlist complete notification' to Yes.
Configuring which Application Statuses should prevent the shortlisting complete email being sent

In order to prevent the Shortlisting Complete email from being generated at the wrong time, in System Settings > Security Roles you are able to configure which statuses should prevent the Shortlisting Complete email from being sent.

Within the Security Role, the Application Status(s) tab has a 'shortlist' column. If the application status checkbox in this column is ticked, the shortlisting complete email will not be sent whilst there are applications currently at that status against the job.