

Sending Invitations to Interview or Other Assessments

Taleo Version 21A

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Saskatchewan! 

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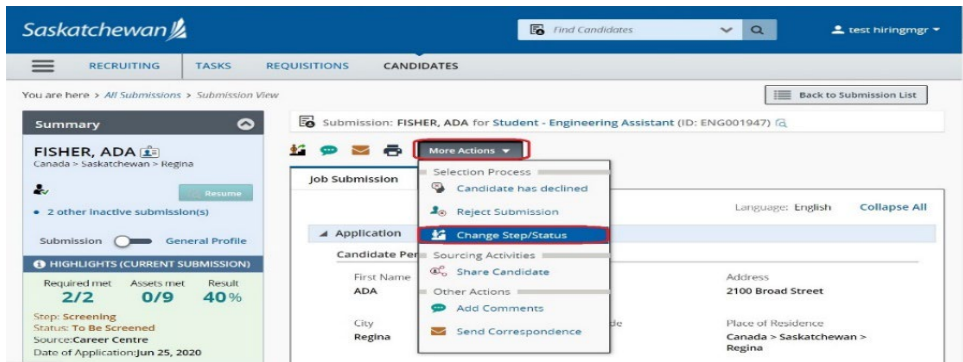
Before You Begin

You will need to gather the following details:

- Interview schedule (Dates, times, and locations for each candidate)
- Will the candidates be asked to arrive early to review the Behavioural Descriptive Interview questions prior to the interview?
- Is there an exercise or other assessment for the candidate to do following the interview?
- Does the candidate need to prepare anything in advance, such as a presentation?

See Taskroom for more information related to [Inviting Candidates](#) and [Preparing for Interviews](#).

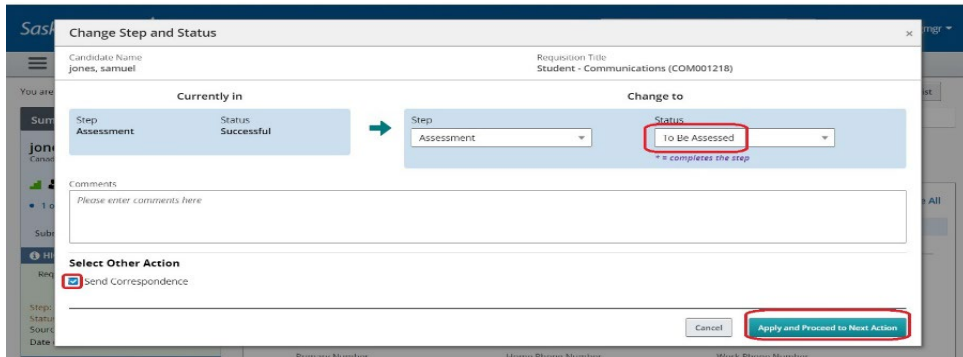
Sending an Invitation to One Person at a Time



While viewing the candidate's application, in the **More Actions** drop-down box, select **Change Step/Status**.

Alternatively, click the **Change Step/Status** icon  by the left side of **More Actions** button.

(If the candidate is already in the Step/Status of Assessment/To Be Assessed, then select **Send Correspondence** instead, and skip to the Select Template section below.)

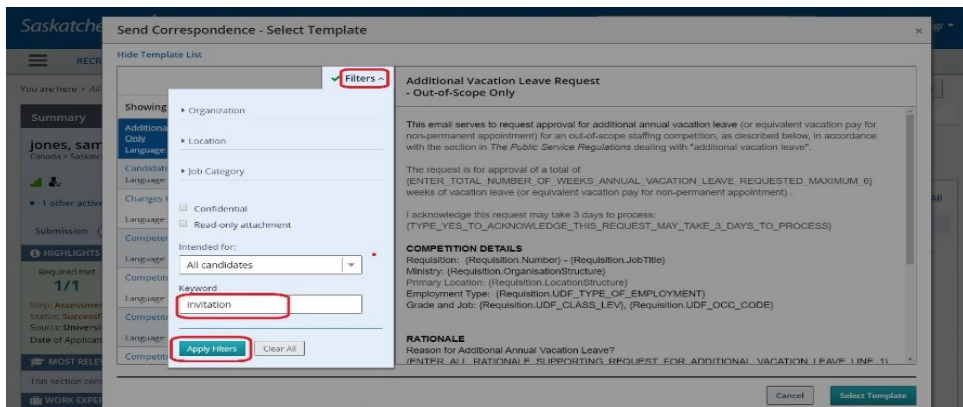


Make note of the candidate's current Step/Status.

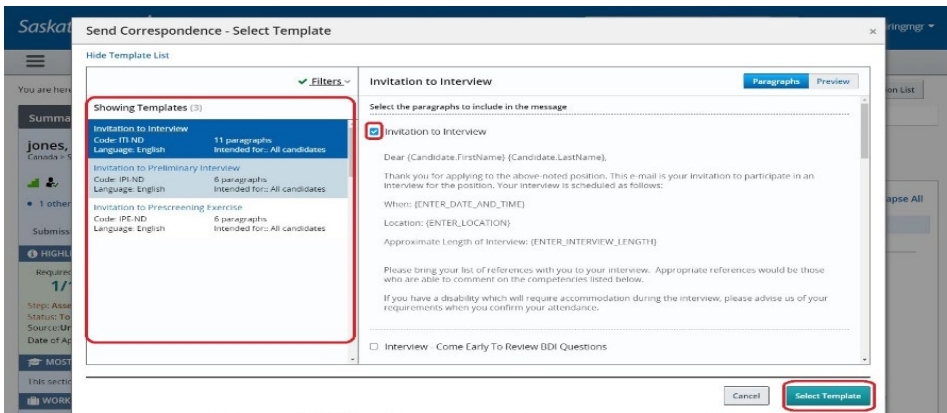
Under **Change to** section, select **Assessment** under **Step**; and **To Be Assessed** under **Status**.

Check the box for **Send Correspondence**.

Click **Apply and Proceed to Next Action**.



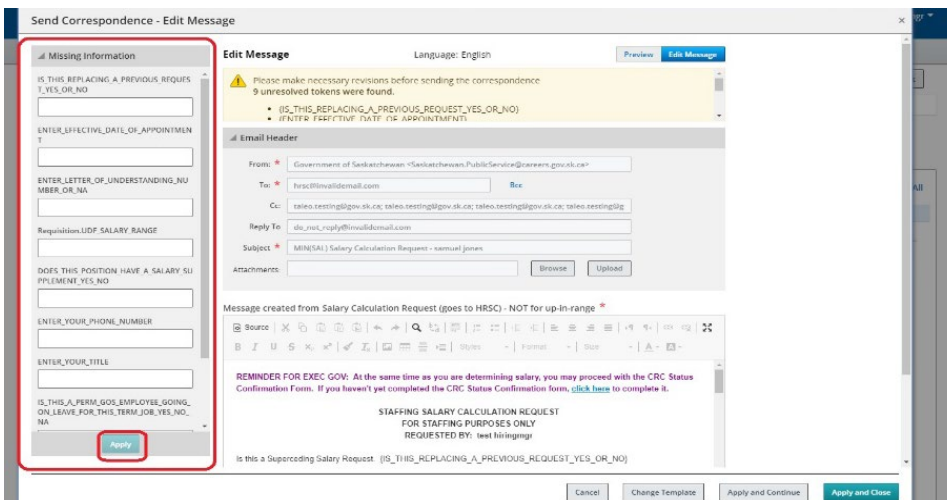
Click **Filters** to open the filter window. Type the word **invitation** in the Keyword field and click **Apply Filters**.




Select the correct template, based on the type of assessment.

Review the paragraphs available, selecting those which are applicable.

Click **Select Template**.

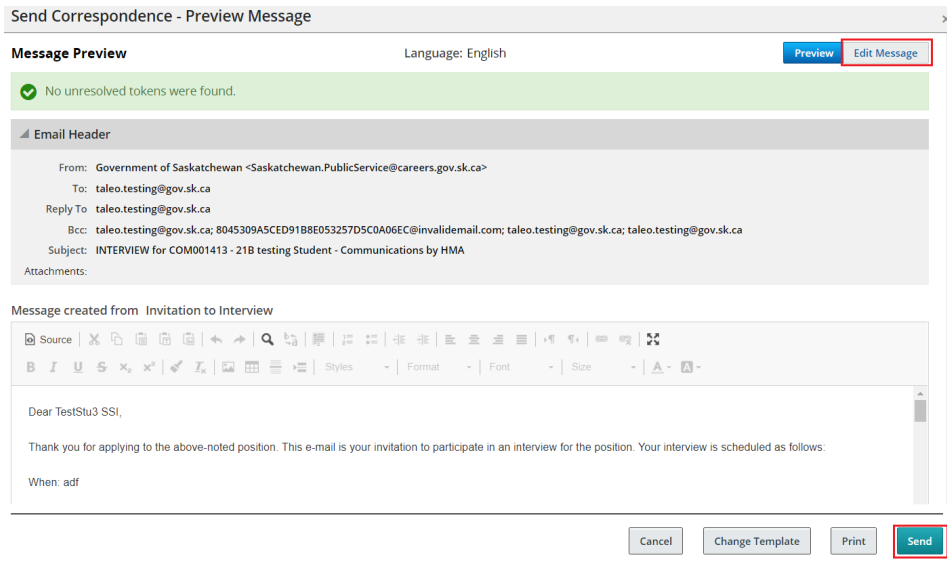


The Send Correspondence window pops up.

Read the warning  message for more information.

Fill in the missing information in the left section. The invitation will insert what you type, exactly as you type it; so ensure you use correct formatting, spelling, and grammar.

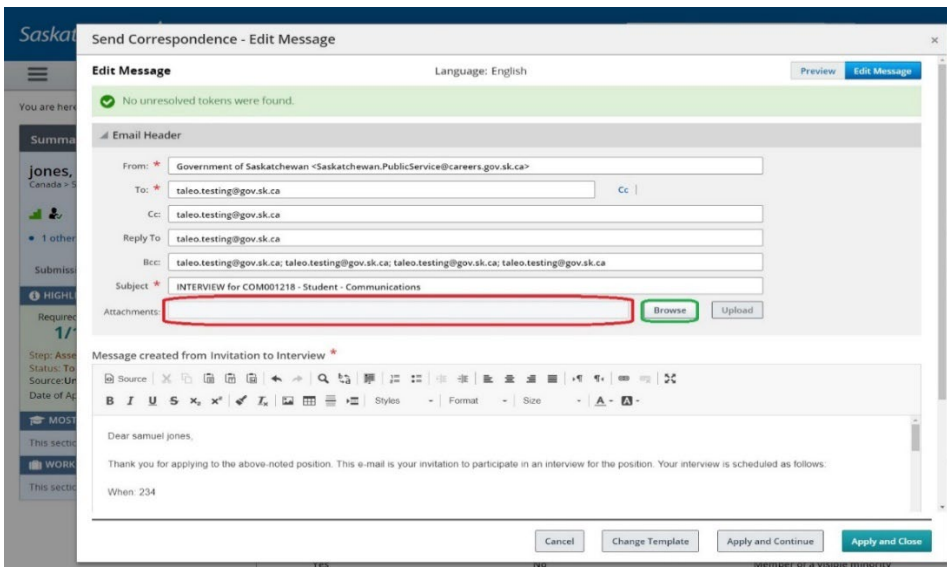
Click **Apply**.



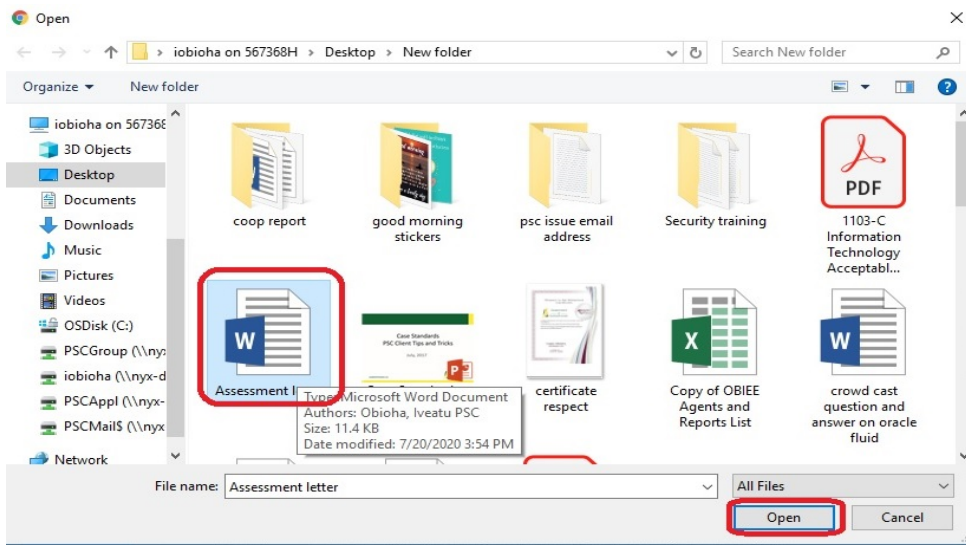
Scroll through the correspondence to ensure the content is accurate. To correct the errors, click **Edit Message**.

If you wish to change the “From” email address, replace the content in that field with the desired email address.

If you are making changes to the “To”, “CC” or “BCC” lines, use a semi-colon between email addresses. Ensure the line does not end in a semi-colon.

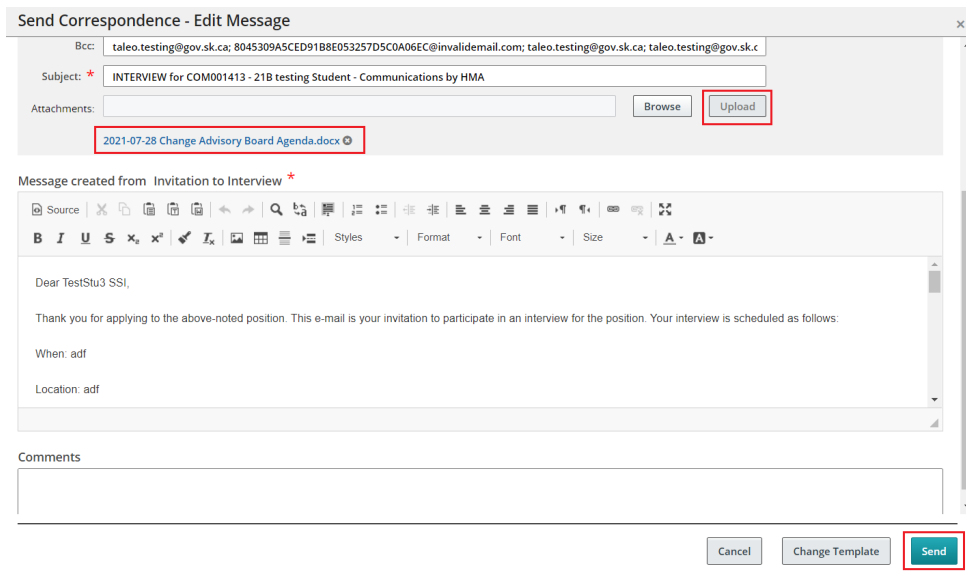


If you need to attach a file to the invitation, click the Browse button in Edit Message screen.



Navigate through your computer's folders to locate the file you need to attach.

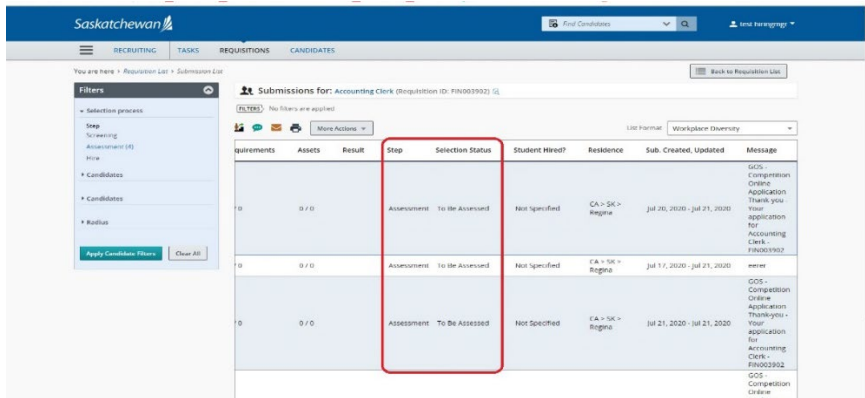
Click **Open** button.



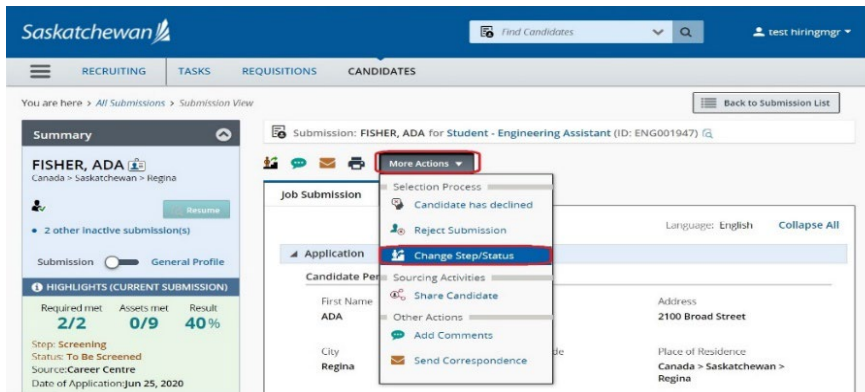
You will then be taken back to the correspondence. The file will not yet be attached, though. Click **Upload** button to attach the document.

When the correspondence is ready to send, click **Send**.

Sending Invitations to More Than One Person at a Time

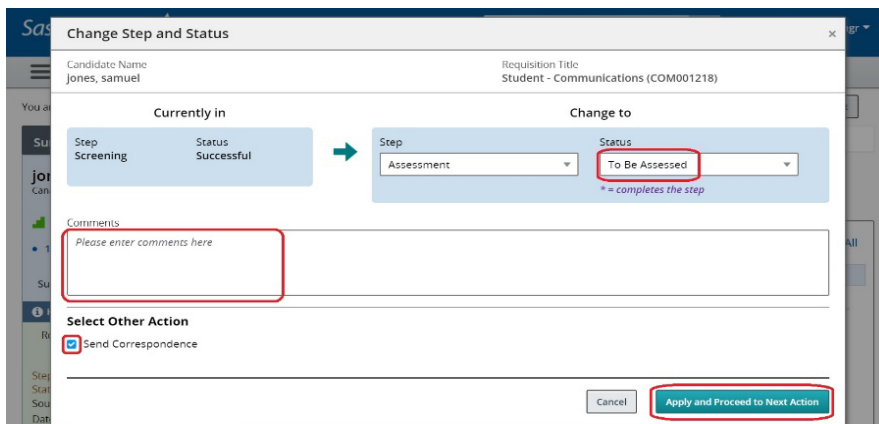


In the Candidate List, make note of the Step and Status of each candidate to whom you wish to send the invitation. In order to send the invitation to more than one candidate at a time, all recipients must be in the same Step/Status.



Place a check-mark to the left of each individual who you want to invite, then select Change Step/Status from the **More Actions** drop-down.

(If the candidates are already in the Step/Status of Assessment/To Be Assessed, then select “Send Correspondence” instead, and skip to Bulk Action-Send Correspondence section of this guide.)

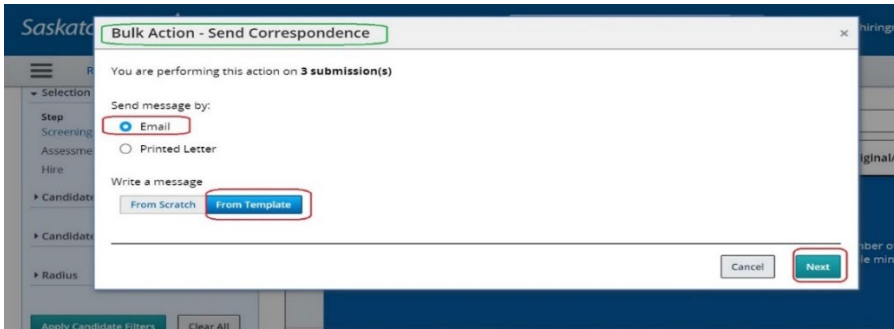


Make note of the candidate’s current Step/Status.

Under “Change to” section, select **Assessment** under “Step”; and “To Be Assessed” under **Status**.

Check **Send Correspondence**.

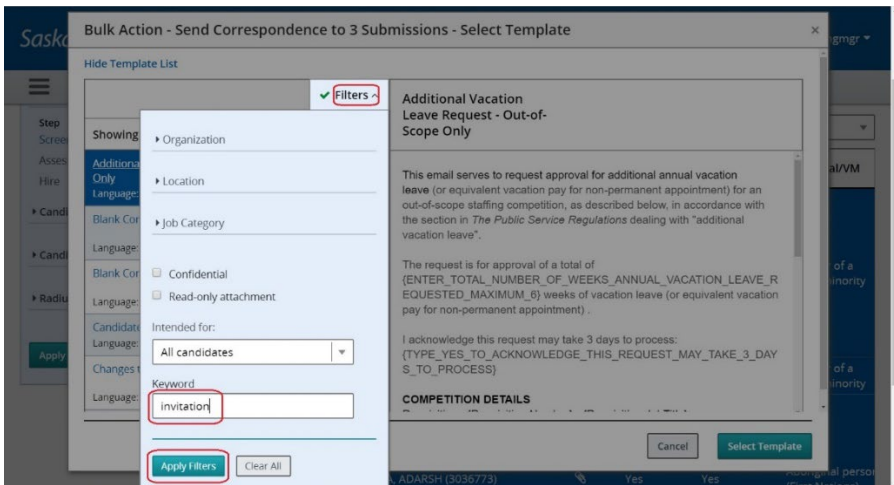
Click **Apply and Proceed to Next Action**.



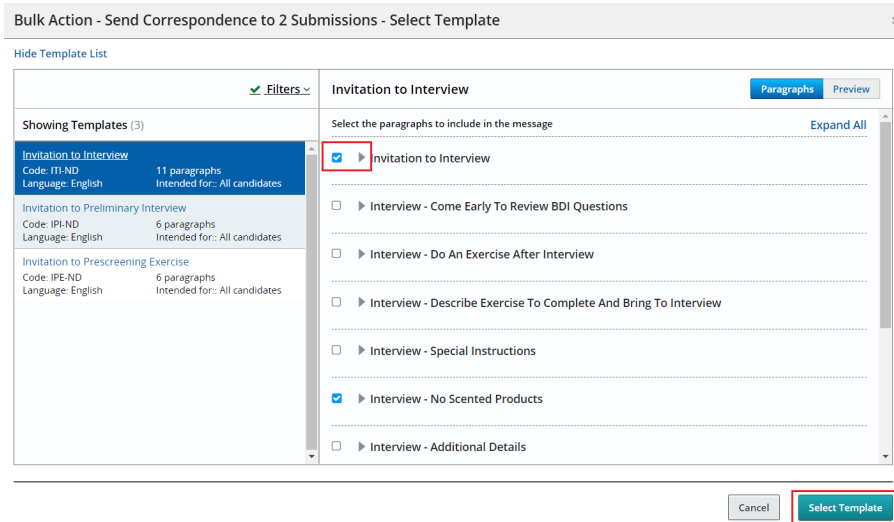
The “Bulk Action - Send Correspondence” window pops up indicating you are sending to more than one candidate.

Email and **From Template** are selected by default.

Click **Next**.



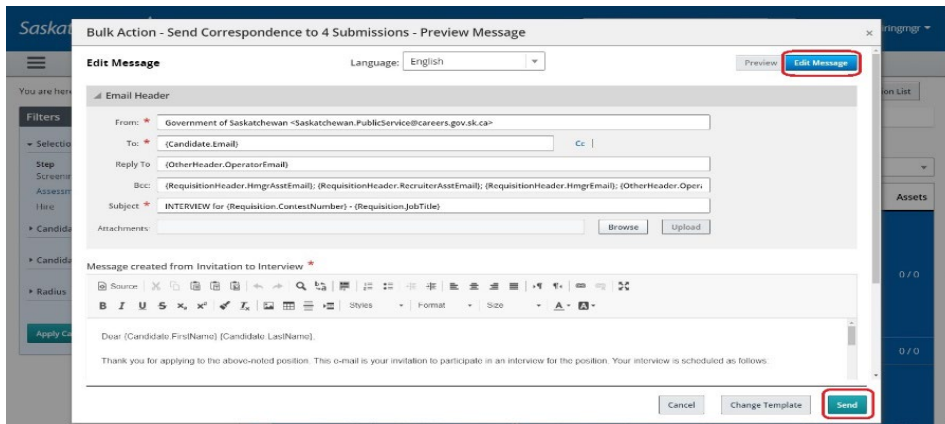
Click **Filters** to open the filter window. Type the word “invitation” in the Keyword field and click **Apply Filters**.



Select the correct template, based on the type of assessment.

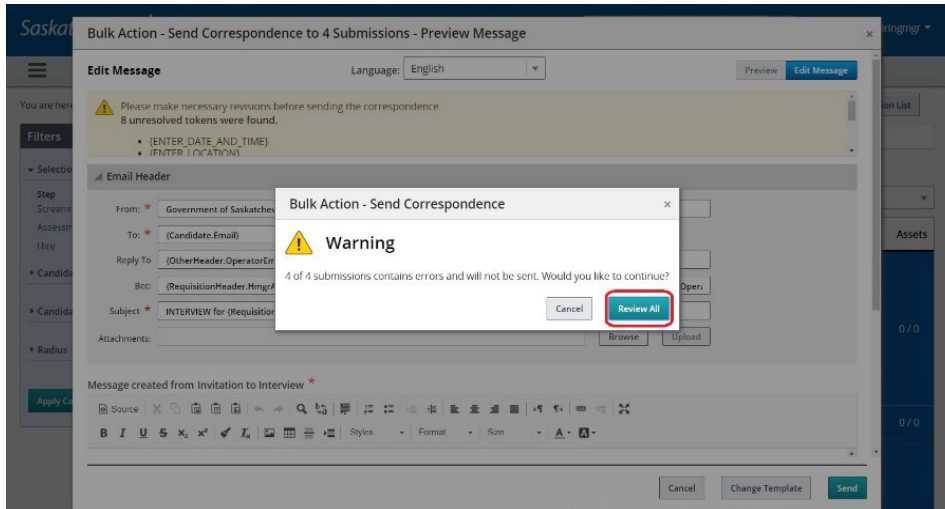
Review the paragraphs available, selecting those which are applicable. Each paragraph is listed on the right-hand side. Click **▶** to the left of the paragraph title to open and review the paragraph, ensure those that are selected are appropriate.

Click **Select Template**.



The **Preview Message** screen pops up. Any changes made in this screen will apply to the correspondence send to all selected candidates.

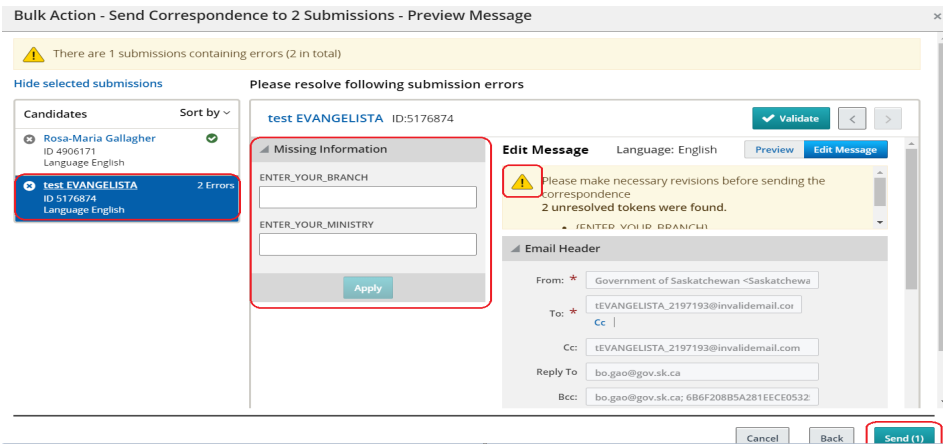
Click **Send**.





You will get a warning message if the template contains any missing information. This is normal when the template include the prompts (tokens).



VERY IMPORTANT: This process will create identical invitations for every candidate – in the next screens, you will need to edit each invitation individually to change the date/time accordingly. Failure to do so will have all candidates invited for exactly the same date/time as each other.

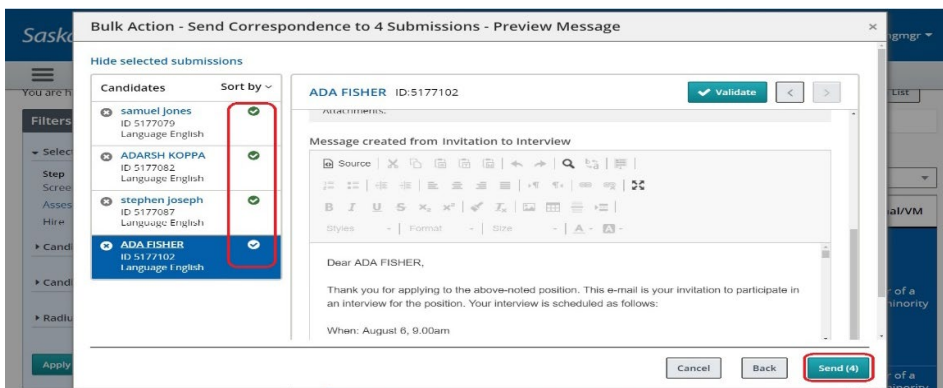
Click **Review All**.



Read the warning  message in this window for more information.

Fill in all the missing information for a candidate, click Apply button. You will see this check icon  beside the candidate names.

You can use these navigation   buttons by the top right to move from one candidate to another. Alternatively, you can click on each candidate names displayed by the left of the screen. Review and update the date and time for each candidate's interview. Click **Apply** for each candidate.



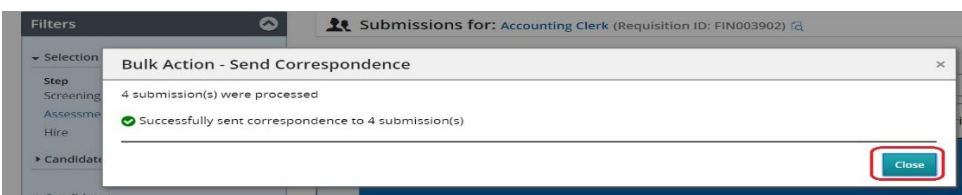
Scroll through the correspondence to ensure all content is correct.

The invitation will insert what you type, exactly as you type it; so ensure you use correct formatting, spelling, and grammar.

The **Send (X)** button will be available when the messages are ready to send. X is the correspondence number to be sent.

Once you are confident that all of the correspondences are ready to send to the candidates, Click **Send**.

Note: Candidates will stay being selected until manually deselected.



You will get a message to notify the successfully process.

Click **Close** button to close the pop up window.