



## CREATING AN INTERVIEW SERIES

The system helps you track everything you need for your interview rounds! Interview series can contain applicants, interview sessions, participants (one of which will be the series organizer), and questionnaires.

You can create a new series from three different areas within applicant tracking. Select **Interviews** on the home page, access the applicant’s “Interviews” tab on his/her profile, or use the option to “Schedule an Interview” within your batch actions.

Click **Create New Series** to create a new event, and on the new window that appears, complete the information in each of the following tabs.

### “Start” Tab

Use the “Start” tab to edit an existing interview series or to create a new series. The edit option involves the selection of a current, active interview series while the creation of a new series involves three options:

- General Recruiting: This option does not associate the interview series with any specific job posting or hiring pool.
- Specific Posting: This option allows the Administrator to select a specific job posting.
- Position Pool: This option allows the Administrator to select a specific position pool.

**Add to interview series**

Edit or create an interview series by making a selection below.

Edit existing interview series

Create new interview series

- General Recruiting - not associated with a specific posting or pool
- Specific Posting
- Position Pool

### “Series Details” Tab

Enter a title for the interview series in the text box, but keep in mind, we recommend you use the provided title to reflect the exact JobID, Position Type, and/or interview session details.

Select a default location for the interviews and adjust the series’ details in the final “Options” section.

**Start** | **Series Details** | Sessions | Participants | Questionnaires | Summary

**Title:** How would you like to refer to this interview series in the future?  
Job ID:108 - Gifted Teacher at Echo Hills Elementary

**Location:** Where will these interviews be held? This location can be overridden on a per-session basis later.  
Select a default location for interview sessions

**Options:**

- Enable automated telephone interviews via the Questionnaires Tab - applicant tracking can call your applicants, read them your questions and record the candidate responses over the phone (Requires: Automated Telephone Interview Credits).
- Allow applicants to reschedule interviews.

When do sessions become available: As soon as sessions are created

When do sessions become unavailable: 2 days prior to start

### [“Sessions” Tab](#)

Click **Add New Session** to include additional sessions to the series, but keep in mind, these sessions represent individual interview time slots.

A pop-up window will appear where you can fill out the session details. Select a “Single Occurrence” to create a single, new interview session, or click “Multiple Occurrences” to create multiple interview slots.

### [“Participants” Tab](#)

Click the checkbox beside the names of those who will assist in the interview process and choose whether the selected participants will edit the series and/or be notified when changes are made. You can also list additional individuals within the “Other participants” section who are involved in the interview process but are not users within applicant tracking.

### [“Questionnaires” Tab](#)

Use this tab to allow interview committee members to record insight about the assigned applicants. The form becomes attached to the series, and once added, members can also view this form directly from the interviewed applicant’s profile. Click the **Add or Create a New Questionnaire** link to view your options. Once selected, choose a global questionnaire from the dropdown or [create a new questionnaire](#).

### [“Summary” Tab](#)

Reference this tab as an overall summary of your work. You can view the title, assigned applicants, scheduled sessions, interview participants, and questionnaires. Click **Save and Finish** to save your series.

### [My Account](#)

Review your series and select **Download Calendar** to add your interview series to your personal calendar.

