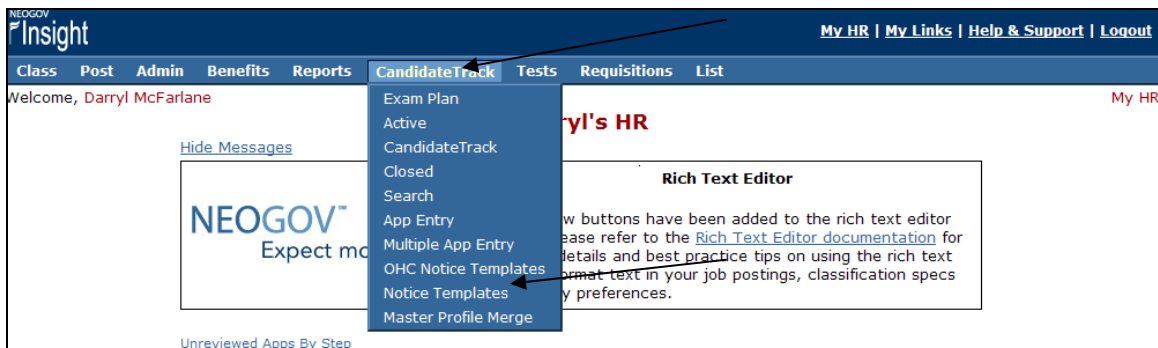


Creating Email Notice Templates

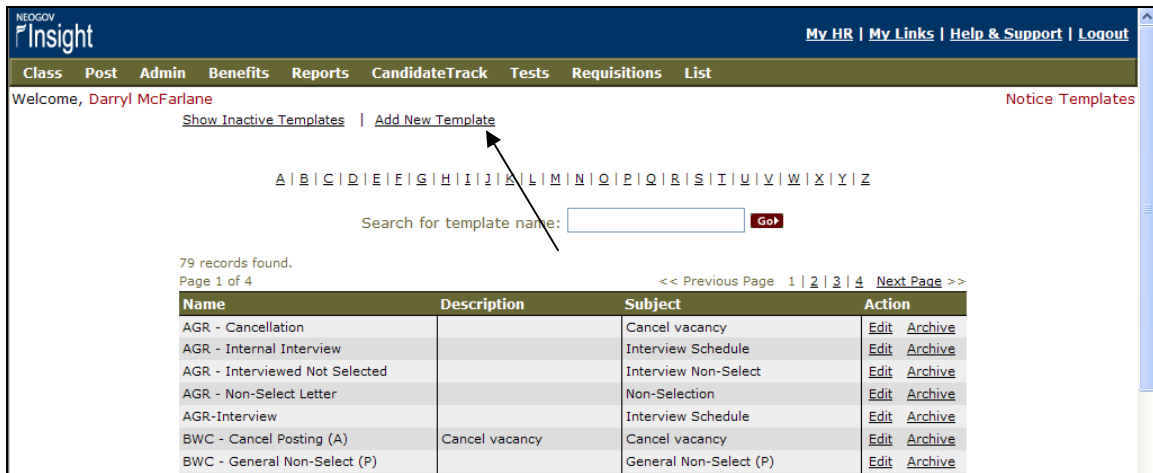
The job aid will explain how to send email notifications to applicants regarding the status of their applications.

Navigation Path: CandidateTrack | Notice Templates

Step	Action	Comments
1.	Log into Insight – Human Resources	
2.	Select “CandidateTrack” from the dropdown menu	
3.	Select the “Notice Templates” option.	



4.	Click “Add New Template”	
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Step	Action	Comments
5.	Name your template, entering the three letter abbreviation of your agency, board or commission before the name (e.g. DAS – Non-Select Notice) to make it easy to find when you need it.	<ul style="list-style-type: none"> You will see templates created by other agencies. DO NOT edit templates created by another agency You can, however, copy another agency's template and adjust it to fit your agency
6.	Enter a description, subject and type your template using the Merge Fields listed under the template, then click "Save".	<ul style="list-style-type: none"> DO NOT select a "Reject Reason". You will have to scroll down to see the Merge Fields

* Required

* Name:

Description:

* Subject:

Reject Reason:

* Template:

Step	Action	Comments
7.	To send a notice to an applicant by e-mail, go to your exam plan and click on the Evaluation Step where the applicant(s) are located.	<ul style="list-style-type: none"> • There are several ways to get to your exam plan <ul style="list-style-type: none"> ○ Click on exam plan number from "My HR" page ○ Go to CandidateTrack – Exam Plan, search for your exam plan, then click on the number

Job Posting						
Job #	Job Title	Status	Last Updated	Assigned To	Action	
20000188	OHMS Analyst	Expired	10/09/08	Laura Sutherland	Edit	Delete

Recruiting Plan Add New						
Ad Type	Ad Name	Requested Date	Start Date	End Date	Action	
Internet	Monster.com	09/05/2008	09/06/2008	10/06/2008	Edit	Delete

Evaluation Steps Add Step View Applicants (5) View Applicants by Step (2) App Flow						
Step	Evaluation Step	Weight	Results	At Step	Action	
Step 1	Application Received	N/A	View Results	0	Filter	
Step 2	Minimum Qualifications	N/A	View Results	1	Edit	Delete Filter

Step	Action	Comments
8.	Choose "Email Notify" from the "Select Action" dropdown; select which candidate(s) you want to notify from the "Select Candidate(s)" dropdown menu and click "Go".	

Step 2: Minimum Qualifications

1 record found. Step History
Step Comments

Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices
<input type="checkbox"/> Sutherland, Laura	202971	View	Pass		•	Online	06/10/08 12:43 PM	N/A

Select Action: == Select == Select Candidate(s): == Select == **Go**

9.	Choose Template from the "Select Template" dropdown menu and click the "Generate Notices" button	<ul style="list-style-type: none"> It is best to leave Email Format as "Text" as some applicants may not be able to view HTML emails. Candidates will be separated based on their Dispositions. <ul style="list-style-type: none"> You will need to choose the template for each disposition group even if you wish to send the same email to all applicants
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BS10000000: OHMS Analyst

Select Email Format: Text

Disposition: Rejection Reason Not Specified Template: == Select Template ==

Candidate	Person ID	Email	Date & Time Received
Sutherland, Laura	202971	laura.sutherland@das.state.oh.us	06/10/08 12:43 PM

Generate Notices

Step	Action	Comments
10.	A preview of the email(s) will appear. Click the "Send" button to send the email(s)	Scan the email(s) to verify you've selected the correct template and that no errors were made. NOTE: If sending to many applicants, only the first 10 emails will appear.

OHMS Analyst

Email preview appears below. Email will NOT be sent until you click on the 'Send' button.

Reject Reason Not Specified Template: **DAS - Non-Select**

Candidate	Person ID	Email	Date & Time Received
Sutherland, Laura	202971	laura.sutherland@das.state.oh.us	06/10/08 12:43 PM

Email 1 (To: laura.sutherland@das.state.oh.us)

11.	You will receive a message saying the emails were successfully sent. Click "View Applicants by Step" to return to Exam Plan.	
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[View Applicants By Step](#)

OHMS Analyst

Emails sent successfully.

Reject Reason Not Specified Template: **DAS - Non-Select**

Candidate	Person ID	Email	Date & Time Received
Sutherland, Laura	202971	laura.sutherland@das.state.oh.us	06/10/08 12:43 PM