

Candidate Manager

Quick Start Guide



Administering Leavers



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System Login

To access the great{with}talent candidate manager go to <https://www.greatwithtalent.net> and add this page to your browser favourites.

Login to the system using your username and password provided. Both username and password are case sensitive. If you forget your login details then you'll be able to retrieve them using the link provided.

Candidate Manager Home

Candidate Manager Home is the default starting location upon successful login. From this page you can manage and track all leavers throughout the exit questionnaire process:

- View a summary of who has completed the exit interview and those who have yet to complete
- See your exit interview completion rate
- Add candidates and send completion reminders
- View usage reports and how many usage units you have remaining on your account
- Access great{with}talent support services.

Candidate Summary

The Candidate Summary details which leavers have completed the exit interview, those who have yet to complete it, as well as any leavers who exited the organisation without completing the exit interview.

Open Exit Interviews

Click this link to view a list of leavers who have **not yet** completed their exit interview.

Completed Exit Interviews

Click this link to view the list of leavers who **have** completed their exit interview. Depending on your system you can access individual exit profiles from this page. Click the icon to open the report window.

1. Manage Leavers

Add Candidate

Select '[Add Candidate](#)' from the Candidate menu located at the top of the page.

Complete the Add Candidate form.

Depending on your account configuration you will need to add either a valid email address or mobile number. Where possible we **highly recommend** you add both forms of contact.

Once added, invites will be sent to the candidate containing their unique link.

View, Edit or Delete Candidate

Click on the name of the candidate to view the candidate's details. From here you can:

- Edit Candidate. Make the necessary changes in the form and click 'Update Candidate'.
- Delete Candidate. Please note that deleting candidates may result in misleading completion rates.
- Send Email. Send reminder invite emails for Open Exit Interviews.

And **if applicable** to your account set-up:

Manage Raters

- Add a rater for the candidate. Complete the Add Rater form. (An invite email containing a unique link will be sent to the rater).
- Edit Rater. Make the necessary changes in the form and click 'Update Rater'.
- Delete Rater.
- Send Email. Send reminder invite emails for uncompleted rater questionnaires.

Email Deliverability

Under the 'Reports' menu item, select 'Check Email Delivery' to check emails are being delivered correctly to your leavers.

2. Reminders

great{with}talent automatically sends reminders each Monday and Thursday at 10:00am GMT to leavers not yet left the organisation and where the leaving date is within four weeks of the current date. The maximum number of automatic reminders the candidate receives is four.

We also send reminder emails to raters who have not completed the questionnaire, emails are only sent to raters where the candidate has already completed the exit interview.

3. Usage/Service Reports

Under the 'Reports' menu, select 'Service/Usage Report' to view completion rates and usage history by time and/or user. Preview links to questionnaire and email content are also available on this page.

4. User Administration

Only some users have the correct privileges to administer users and view user information. Select 'User Admin' from the menu located at the top of the page.

Add **new users** using the form on the right. When adding new users, there are four user types:

- a. Super User/Administrator - manages users, leavers and full dashboard reporting access
- b. User - manages their leavers only, no access to dashboard reporting
- c. User + Dashboard - manages their data and access to their dashboard data
- d. Report User – full access to dashboard reporting only.

Select 'Edit' under the Options header to change any user's details. Blocking user access to the Candidate Manager and Dashboard Reporting is also set under the Options header.

Except for Report Users, the User Administration page details completion rates by user / user group.

5. Dashboard Reporting & Analysis

When the number of completed exit interviews in your account is five or more (and you have permission), you'll be able to view your leaver's dashboard. Go to the 'Reports' menu and select 'Dashboard Analysis'.

Your dashboard will open in a new window. The dashboard contains help hovers and explanatory text to guide you through your data. If at any point you would like someone to give you a dashboard overview, please let us know at support@greatwithtalent.com.

6. Help & Support

For general help or any technical issues with the services, please contact great{with}talent on our support email address support@greatwithtalent.com. Alternatively, call +44 (0) 333 012 4649 and select Technical Helpdesk at the voice prompt.