Reference Expert

User Guide

Including Distribution & Approval Process

great{with}talent

Terminology

- **Candidate:** The person applying for a job upon whom you are requesting references.

- **Referee:** The person or people who are to be invited to provide a reference for the candidate.

- **User:** A person (or team) who adds candidates, referees and users, generates reference reports and administers the reference process within the ReferenceExpert Candidate Manager system. Each candidate is 'owned' by the user who created them and the user's email address is shown to referees when completing the reference questionnaire.

Reference Questionnaires

There are three types of reference available:

1. **Detailed Employer Reference***
   Full employers reference providing information on working relationships; length of service; salary; known working restrictions; fit to new role; potential; motivation; cooperation with others; free text comment on key strengths and development areas. Completion time is 5 minutes.

2. **Standard Employer Reference***
   Shorter reference focussing on working relationships; length of service; salary; known working restrictions and free text comments. Completion time is 2 minutes.

3. **Personal Reference**
   Personal reference focussing on relationship type; length of relationship; salary; known working restrictions and free text comment on key strengths. Completion time is 2 minutes.

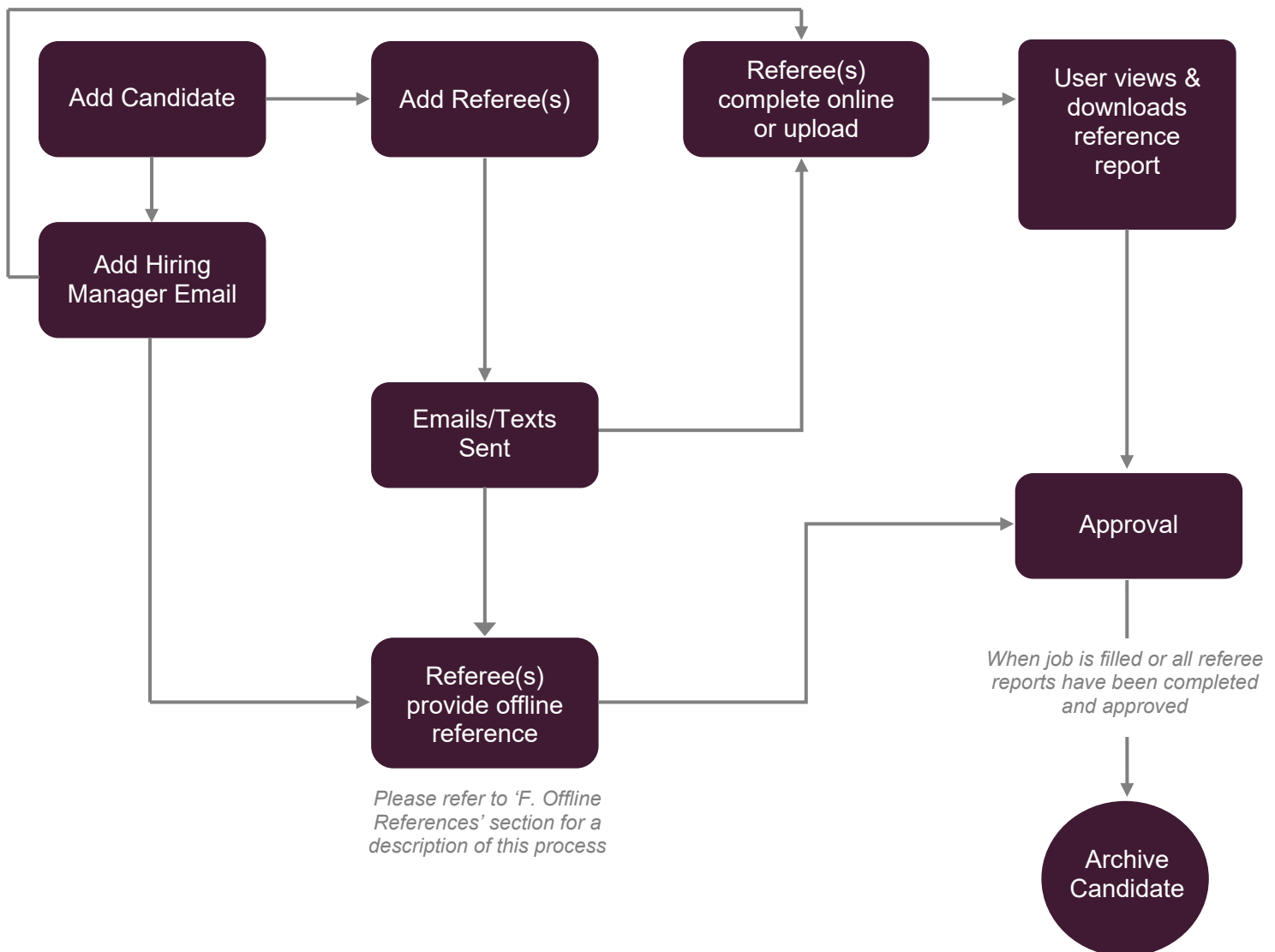More information is available at www.referenceexpert.com/product/

* Based on your configuration these references may also include additional safe-guarding questions.

System Login

To access the 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 simply enter your email address into the appropriate field and click "Send".

Process Overview

```
Add Candidate  →  Add Referee(s)  →  Referee(s) complete online or upload  →  User views & downloads reference report

Add Candidate  →  Add Hiring Manager Email

Add Referee(s)  →  Emails/Texts Sent

Emails/Texts Sent  →  Referee(s) complete online or upload

Add Hiring Manager Email  →  Referee(s) provide offline reference

Emails/Texts Sent  →  Referee(s) provide offline reference

Referee(s) provide offline reference  →  Approval

User views & downloads reference report  →  Approval

Approval  →  Archive Candidate
```

Please refer to 'F. Offline References' section for a description of this process

When job is filled or all referee reports have been completed and approved

Candidate Manager

A. Start Page

The Candidate Manager start page shows an overview of some key metrics for your candidates and referees. This information can be filtered by different admin users (system super-users only) and / or by date using the drop-down lists provided.

(On first visit, this page will be empty as you will have not added any candidates or referees yet).

Reference Completion Rate

Shows the percentage of referees who have completed their reference request and those who have not for the selected date period and / or user. In addition, those referees whose reference request is now overdue (past the 'completion date' provided) are displayed in the summary table with a link to a pop-up showing full details and options. From this pop-up, reminders can be sent, the referee can be deleted, or the reference can be set to 'offline reference received' (see 'Offline References' section for more information on this process).

Recently Completed References

Displays the top 10 most recently completed references for the selected date period and / or user. Reports can be generated directly for these referees by clicking the report icon () or downloaded via the icon. Referees displayed with a report icon with a cross () cannot have reports generated as they are those that provided an offline reference (see 'Offline References' section for more information on this process).

A link to 'more' completed references is also provided where a page lists all references received in order of most recent first.

Referee Usage Over Time

This section graphically displays the number of referees added and completed for a given month for the selected user(s) (the date filter does not affect this graph).

B. Add Candidate

Select 'Add Candidate' from the Candidates menu located at the top of the page.

Complete the Add Candidate form. Enter first name, last name, select a job folder and enter the position information as requested.

Position Information

It is very important that information provided under 'Position Information' is accurate as it may appear as source information in the questionnaire the nominated referees will receive, and in the final reference reports.

The **Job Description** is only visible to referees who are asked to complete the Detailed Employer Reference and plays an important role in providing the referee the ability to compare what they know about the candidate and the role they have applied for.

You can either upload the job description (Word or PDF) or enter the description in the field provided.

Uploading consent forms – more and more referees require proof of applicant consent for reference provision. If you have consent forms then we strongly advise that you upload them – referees will have direct access to them via the emails they receive. Uploading will reduce administration time and improve completion rates.

Asking a candidate to add their own referees

When adding a candidate you can select 'Allow Candidate to add own Referees' in the Referee Management section of the form. You will then be asked for the following additional information:

1. **Candidate email address**
   An email will be sent to the candidate with a link to a page where they can add and manage their referees.

2. **Number of references required**
   Select the number of each type of reference you require the candidate to provide. Typically, you would choose a number of Detailed **or** Standard Employer and maybe some Personal References.

For candidates where you have requested this, the Candidate Manager shows the 'select own referees' icon () to indicate this.

C. Adding Referee(s)

Once the candidate has been added, referees need to be added to complete references. To open the 'Add Referee' form, click the icon against the candidate. You do not need to add referees if you have allowed the candidate to manage this process.

Complete all required fields and select a *Completion Due Date*; this is the date that you require the referee to complete their reference by. The Candidate Manager automatically sends reminders to all referees who have not yet completed their reference up until this cut-off date. (You can also manually send reminders through the Candidate Manager by clicking on the icons against the referee on the Active Candidates page).

Once added, the Candidate Manager system will automatically send invitations to the referee with a link to the reference questionnaire.

Please note: If you would like to be copied in on the invite email then separate email addresses with a **semi-colon**, e.g. candidate.name@person.com; your.name@org.com

Once a referee completes their reference questionnaire two emails* are sent; one to the referee with a link to their reference and one to the user to notify them that the referee has completed.

* A third email is triggered if an email address is specified for Reference Approval

D. Active Candidates

The Active Candidates page shows a snapshot status of your candidates and referees. From this page you can manage and track all references:

- By clicking on the numbers in the **Referee Summary** for a candidate or the icon you will view all referees, their status, options and which type of questionnaire they have been requested to complete, as follows:

     : Detailed Employer Reference

     : Standard Employer Reference

     : Personal Reference

- Other functions available on this page are:
    - Add new referees and send completion reminders
    - Set referees to 'offline reference received'
    - Remove referee reference requests
    - Generate reference reports.

E. View Reference Reports

Reference reports can be generated for each referee that has completed their reference online by clicking the report icon for that referee on the View Referees page. The report is created as a PDF in a new window and can be printed or saved locally.

Some referees will provide their reference on standard corporate templates and are given the opportunity to securely upload their reference. Click the uploaded reference icon to view and download the reference.

F. 'Offline' References

It may be a referee's company policy to only provide references using their own template. In this instance they will not be able to complete the online reference but can provide their reference via our secured upload facility (Word or PDF files).

Some referees may not be able to use the upload facility due to IT restrictions. The reference process is then as follows:

1. Referee receives reference request email
2. Referee clicks a 'provide offline reference' link
3. System automatically sets reference as 'pending offline reference'
    - Candidate Manager system shows the referee status as

4. Once the offline reference has been received by you, click the 'Paper reference received' icon () for the referee to set their reference to completed.
    - Candidate Manager system shows the referee status as
5. The reference is now closed and no further reminders will be sent to the referee
6. You can upload the reference so it's available in the system by clicking the icon.

G. Reference Distribution & Approval

When a reference is completed online, any email address provided under 'Reference Distribution' (during the addition of the candidate) will be invited to view and download the reference.

If our *Approval Process* is enabled, the person receiving the email will be invited to view and approve the reference. Upon completion of the approval process, an email will be sent to the user with the approval status.

There is no automatic emailing of Approval Process emails for offline references. Once the offline reference has been received, the user can send the reference and the approval link. The approval link can be obtained by clicking on the Referee's name to view their details.

H. Other Functions

View, Edit & Delete Candidates

From the Active Candidates page, click on the name of the candidate to view or edit their details. From here you can edit the candidate name, their allocated job folder and their position information.

Candidates can be removed from the system by clicking the delete icon on the Archived Candidates page (Active Candidates cannot be deleted). Please note that deleting a candidate will also delete all their referees, responses, links and reports.

View, Edit & Delete Referees

From the Active Candidates page, click on the name of the referee to view or edit their details. From here you can edit their name, job title, organisation, completion due date and other fields as well as view their reference completion status and details of the candidate upon which the reference has been requested.

Referees can be removed from the system by clicking the delete icon on the Active or Archived Candidates page. Please note that, once deleted, any links they may have received to their reference questionnaire will no longer work.

Archive Candidates

Once all referees have completed their references and their reports have been printed / saved – or the specific recruitment has completed – the candidate can be archived by clicking the 🗃 icon on the Active Candidates page. This simply moves the candidate (and their associated referees) from Active Candidates to Archived Candidates and tags them as 'archived in the system'.

We also automatically archive all candidates after six months.

Candidates can be easily re-activated by clicking the 🗃 icon, where they will be moved back into the Active Candidates.

I. Job Folder Admin

Job Folders allow you to assign your candidates and references into more manageable groups. For example, you may have different recruitment streams in progress at the same time.

The Job Folder Admin page shows candidate and referee data for each of the job folders associated with your account.

Simply use the Add Job Folder field to create another job folder. When you add a candidate you will then be able to select the appropriate job folder with which to associate them.

Note: all users are pre-assigned one default job folder called 'General'.

Delete Job Folder

Under 'Action' for a particular job folder click the delete icon ❌. This will remove all candidate and referee data (both open and completed questionnaires) and cannot be undone.

J. My Details

Use the My Details menu item to change your personal details and your access details. We recommend that you change your password every 3 – 6 months or according to IT policy.

K. 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 (you will need notify the user of their username and password, the system does not do this automatically). Select 'Edit' under the Options header to change user details. Blocking user access to the Candidate Manager is also set under the Options header.

The User Administration page details completion rates by user/user group.

L. Reminder Emails

great{with}talent automatically sends reminder emails each Monday and Thursday at 10:00am GMT to referees who have not yet completed the questionnaire and where their Completion Due Date is less than two weeks in the past. In addition, reminder emails are sent to those candidates who you have asked to provide their own references and who have not yet done so.

M. Help & Support

For general help or if a system error occurs, 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.