

Your guide to Hireserve ATS: Interview scheduler

How to create an interview schedule, manually set interview times, or create a candidate self-selection process.



Introduction

The Interview Scheduler is used to schedule interview slots and plan the availability of interviewers.

It is a flexible tool that enables you to set up slots with almost any start time and duration, and to assign more than one slot to a candidate or more than one candidate to a slot.

Candidates can also select their own slots through the candidate portal. Some of these features are controlled by system parameters, which we'll detail at the end of this document.

What you'll learn from reading this guide

In this guide, you'll learn how to:

- Create an interview schedule
- Set a manual interview selection process
 - Set a candidate self-select interview process

We hope you find this document useful, but please do contact the <u>Customer Care team</u> if you need any further assistance.

Disclaimer:

Please note that because Hireserve ATS/Unit4 Recruitment can be highly customised, the words and phrases referenced in this guide may be used differently in your site.

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'My interviews' screen

Overview

The 'My interviews' screen lists the interview schedules that are currently set. You can access this screen via **Candidates > My Interviews,** in the left-hand menu of the ATS back-office dashboard.

To view or edit the schedule, click the 🖉 icon to the left of it.

This displays the 'Interview Schedule Details' screen.

'Interview Schedule Details' screen

Each interview schedule is associated with a specific job.

Hiring managers can access the Interview Scheduler for jobs that they own from the 'Options' menu when viewing a folder associated with the job.

If there is already an interview schedule for the job, this will be displayed.

Otherwise, the hiring manager will be able to create a new interview schedule for the job.

- Job title: Title of the job for which interviews are being scheduled
- ✓ **Ref No:** Reference number of the job for which interviews are being scheduled
- Selection track type: Tracking type used to select candidates when the schedule was created
- ✓ **Hiring manager:** Manager responsible for filling the job
- Status: Indicates whether the schedule is planned, past or finalised
- Date Created: Date on which the schedule was created
- ✓ User ID created: User who created the schedule
- Schedule type: Indicates whether slots are allocated within Hireserve ATS of self-selected by candidates
- ✓ Number of slots: Number of interview slots required for each candidate



The filter at the top of the page enables you to refine the list by status:

Planned: A draft schedule that is still subject to change.

Past: A schedule that has been completed.

Finalised: A schedule that has been approved.



Number of (total) spaces: Total number of candidates that can be booked into the schedule

- Number of candidates: Number of candidates that can be booked into each slot
- / Number of bookings: Number of slots that have been booked

Creating an interview schedule

You can specify whether candidates can select their own interview times from the slots available, or if you will manually assign them, by enabling the MULTI_INTERVIEW_MODES_ENABLED system parameter. The fields shown in the 'Interview information' section of the 'Interview Schedule' screen will depend on whether this parameter is enabled.

Ä	hireserve recruitment software	Interview Schedule Schedule Details		
亘		File ··· Options	History	
	Dashboard			
۰ د	DBA settings	Interview Information		
90	Data Protection	Schedule Title		
\$ (Configuration	Hiring Manager	•	\sim
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* (Candidates	Default Location	• Manual Self Select	
I	My Candidates Add Candidate Interview Scheduler My Interviews	Bcc interviewers Number of Slots per Candidate Continue	• 1	

- **Schedule Title:** The name of the interview schedule
- Job: The job for which interviews are being scheduled.
 This opens the Job Selector pop-up window.
- Hiring Manager: Manager responsible for filling the job; this user will be assigned as the main interviewer for each slot
- Candidate Selection: Selects candidates at different stages of the recruitment process (and shows the number of candidates at each stage)
- Schedule Type: Specifies how interview slots are allocated

- **Default Location**: Location where interview will take place
- Bcc Interviewers: This check-box allows users to override the existing MULTI_INTERVIEW_DISABLE_INTERVIEWER_ NOTIFICATIONS system parameter for one or more interview schedules
- Number of Slots per candidate: Sets the number of interview slots initially allocated to each candidate



Hireserve	Interview Schedule Schedule Details	
Dashboard	File ••• Options •• Histor	у
Configuration	Interview Information	
💼 Jobs	Schedule Title Job	Finance assistant interviews Finance assistant / 43
📽 Candidates	Hiring Manager	Fendley, Helen
My Candidates Add Candidate Interview Scheduler My Interviews Assessment Criteria	Candidate Selection Schedule Type Default Location Invite to Interview Invite to Interview Email	 T048 - Invite to interview(3) Manual Self Select London T049 - Interview Confirmed E73 - Confirmation of interview (interview Scheduler)
Q Talent Search	Bcc interviewers Number of Slots per Candidate	 ✓ ✓
Agencies	Continue	
🛃 Reporting		
C Workflows		

Once you fill in the details, click 'Continue'.

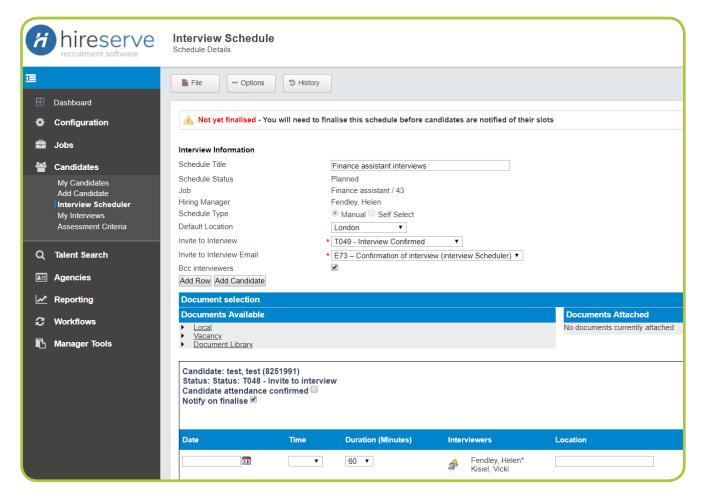
The following steps will depend on whether you have selected a manual or self-select interview schedule.

Tip!
You can specify whether candidates can select their own interview times from the slots available, or if you will manually assign them, by enabling the MULTI_INTERVIEW_MODES_ENABLED system parameter.
₹



Manual selection

In a manual schedule, each candidate is shown separately with the number of interview slots specified when the schedule was created. You select the date, time and duration of each slot manually. This means the user will specify a time slot for each interviewee.



To add a slot to the schedule, click on the 'Add Row' button in the Interview Information section. A new slot is added below the others shown for each candidate.

To add candidates to the schedule, click on the 'Add Candidate' button in the Interview Information section. This displays the 'Add Candidate to Schedule' screen, which lists the candidates associated with the job who are not yet associated with the schedule. Select one or more candidates and then click **File > Save**.

To remove a candidate from the schedule, click on the 💩 icon. You will be asked to confirm the deletion.

To replace a candidate with another candidate, click on the 🔏 icon. This transfers the scheduled interview slots to a different candidate, whom you select from a list on the Replace Candidate page.

To assign an interviewer to the interview, click on the 🌁 icon. This displays the 'Interviewer' pop-up window.

To add or edit comments about the interview, click on the ダ icon. This displays the 'Edit Comment' pop-up window.

Self-selection

In a self-select schedule, the slots and candidates are listed separately. Candidates can select their own slots from the candidate portal. You can manage slot bookings from this screen.

If the MULTI_INTERVIEW_MULTI_SLOT_ALLOCATION_ENABLED parameter is selected, more than one candidate can be assigned to a slot (for example, when scheduling bookings for an assessment centre).

Once a self-select interview schedule is finalised, an 'Invite Interview' email is sent to candidates advising them that they need to login to their candidate portal to select a slot. Once a slot is selected, a 'Confirmation Interview' email is sent. You can configure these emails in the 'Interview Schedule' screen.

Interview Schedule Schedule Details				Q Candidate, Job, User		
File Options 3 Histo	у					
🔺 Not yet finalised - You will need t	o finalise this schedule befo	re candidates will be able to make a sel	ection			
Interview Information						
Schedule Title	Finance assistant intervie	ew schedule				
Schedule Status	Planned					
Job	Finance assistant / 43					
Hiring Manager	Fendley, Helen					
Schedule Type	Manual Self Select					
Default Location	London 🔻					
Invite to Interview	 T048 - Invite to interview 	▼				
Invite to Interview Email	* E69 - Invite to Interview	(Interview Scheduler) V				
Candidate Confirmation	 T049 - Interview Confirmed 					
Candidate Confirmation Email • E73 – Confirmation of interview (interview Scheduler) •						
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To add a slot to the schedule, click the 'Add Slot' button in the Interview Information section. The new slot is added below the others.

To add candidates to the schedule, click the 'Add Candidate' button in the Interview Information section. This displays the 'Add Candidate to Schedule' screen, which lists the candidates associated with the job who are not yet associated with the schedule. Select one or more candidates and then click **File > Save**. To select all the listed candidates, select the checkbox in the header row.

To add a slot to the schedule, click the 'Add Slot' button in the Interview Information section. The new slot is added below the others.

To add candidates to the schedule, click the 'Add Candidate' button in the Interview Information section. This displays the 'Add Candidate to Schedule' screen, which lists the candidates associated with the job who are not yet associated with the schedule. Select one or more candidates and then click **File > Save**. To select all the listed candidates, select the checkbox in the header row.

To delete a slot from the schedule, click on the imes icon.

To increase the total number of spaces by one, click on the 0 icon.

To decrease the total number of spaces by one, click on the 🔮 icon.

To assign an interviewer to the interview, click on the 🇳 icon. This displays the 'Interviewer' pop-up window.

To add or edit comments about the interview, click on the ダ icon. This displays the 'Edit Comment' pop-up window.

Interviewer conflict

If you see the words 'Interviewer Conflict' to the right of a slot, a candidate and/or interviewer is already scheduled for an interview at the same time.

			A 3
irs	Location	Comments	Conflict Status
manya, Chi*	Harwell	¢	Interviewer Conflict

Use the 'My Interviews' screen to view interviewers' scheduled commitments and determine which to alter.

You can view candidates' commitments in the history section of the 'Edit Candidate Details' screen but this will only show the interviews set up when schedules are finalised, not those that are being planned.

If the MULTI_INTERVIEW_IGNORE_CONFLICTS parameter is enabled, the system does not check for conflicts.



The conflict alert relates only to the requested date and time, not to the logistics of attending an interview (for example, an interview in Manchester taking place soon after an interview in London).





To manage a slot, click on the 🔯 icon. This displays the 'Add Candidate to Slot' screen, which lists the slots available to the candidate. Click the 'Book it' button to book the candidate into a slot. The 'Book it' button is then replaced by a 'Release it' button, which enables you to cancel the booking. When no further spaces are available for a slot, the 'Book it' button on the candidate portal is suppressed so that no more candidates can select the slot.

To unassign a candidate from a slot in a manual interview schedule, click the 🗞 icon in the 'Interview slots' section of the 'Interview Schedule' screen. You will be asked to confirm the deletion.

To remove a candidate from a self-select interview schedule, click the 🚳 icon in the 'Candidates' section. You will be asked to confirm the deletion.

Status information

The status of the schedule is displayed at the top of the screen, in a similar way to job status on the Job Posting Form.

If the interview schedule isn't yet live, the message displayed will read 'Not yet finalised':

🛦 Not yet finalised - You will need to finalise this schedule before candidates will be able to make a selection

Once you finalise the interview schedule, the message displayed will be 'Finalised and live':

Sinalised and live - The schedule has been finalised

Interview cancellation

To remove a candidate from the schedule, click the delicon in the 'Candidates' section. You will be asked to confirm the deletion.

Interviewers can now receive email notifications when an interview they were assigned to is cancelled. This is an opt-in feature and is compatible only with manual schedules that have been finalised at least once.

If the required parameter configuration is in place (MULTI_INTERVIEW_NOTIFY_INTERVIEWERS_ CANCELLED_INTERVIEW_E_LETTER_ID), click the dot icon to remove the candidate from the schedule. This will cancel any interview slots that had previously been saved for the candidate, and trigger automated email notifications to any interviewers assigned to those slots.



You can incorporate interviewer details, such as an interviewer's name and job title, into the notification email by using merge fields. To find out more about Merge Fields, head to the <u>Hireserve Hub</u>.



From the 'Interview Schedule Details' screen, you have the following options:

File > Save: Saves changes made on the page.

- > Finalise: Sets the schedule status to 'Finalised' (you need to save the schedule first).
- > New: Refreshes the page with all fields blank.
- > Delete: Deletes the displayed schedule.

Options > View Candidate History: Displays history for all scheduled candidates in a pop-up window.

> List schedules: Displays the 'Interview Schedules' screen.

My interviews

This screen lists the interviews assigned to users. It enables interviewers to view their commitments and HR staff to identify conflicting slots when they see the 'Interviewer Conflict' message on the 'Interview Schedule' screen.

All interviews are included on this page, whether they were created using the 'Progress' option on the 'Edit Candidate Details' screen or using the Interview Scheduler.

The filter at the top of the page enables you to refine the list by time period and interviewer.

y Interviews th	ews e user is assigned								Q Can	didate, Job, Use
File	Options	D History								
ime Period A	JI	~	Enter keywo	rds 🚽	D					
	Interview Date +	Interview Time	Duration	Job Title	Ref No	Candidate ID	Candidate Name	Mobile Phone	Interviewers	Interview Location
/ 🗅 觉	20/02/2019	10:00:00	60	IT Recru	14	10156664	Squarepants, Sp		Chi, Manager	
/ 🗈 🗖	23/01/2019	12:00:00	60	Software	55	9404440	Green, Rob	07503521801	Green, Rob	1177 W.Hastings
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/ 🗅 🗒	08/08/2018	10:45:00	60	Fixed Te	54	9414907	Fendley, Helen	01256634142	Fendley, Helen	London

To view or edit a schedule, click the 🥢 icon. This displays the 'Interview Schedule Details' screen, on which you can change the details of an interview including time, place and interviewer.

To view the documents associated with a candidate, click the $\widehat{\mathbb{m}}$ icon. This displays a pop-up window listing the documents that have been uploaded.

To download the ICS file (the calendar appointment) for an interview, click on the 🛄 icon.

- Interview Date: Date of the interview
- Interview Time: Time of the interview.
- ✓ **Duration:** Length of the interview, in minutes.
- Job Title: Job with which the interview is associated
- Ref No: Identifier of the job with which the interview is associated.
- Candidate Name: Candidate being interviewed.
- Interviewers: Person carrying out the interview.
 Interviewers must be set up on the system with an email address. They do not have to use the system.
- Interview Location: Venue for the interview.
- Comments: Additional information for the candidate.
 It is possible to use the Comments facility to tell the candidate that they will also see other people who are not set up as interviewers on the system.
 However, the system won't be able to indicate scheduling conflicts for these informal interviewers.
- Status: Status of the schedule.

Tip!

If any of the columns listed on the left don't appear on the 'My Interviews' grid, hover over the column headers on the screen to display a small arrow icon.

Click the arrow and hover over the 'Columns' item. This will display a list of columns, alongside checkboxes which indicate whether a column is being displayed. If you'd like to add or remove any columns, simply tick or untick the relevant checkbox.

-

Interview statuses

- One-Off Interview: A single interview created outside the Interview Scheduler.
- Planned: A draft schedule that is still subject to change.
- ✓ Past: A schedule that has been completed.
- ✓ **Finalised:** A schedule that has been approved.



Once a schedule has been finalised, it can still be edited. However, the status will be changed back to 'Planned', and you will need to finalise it again.



Troubleshooting

How do I set up a new interview schedule?

Access the 'Interview Schedules' screen by clicking **Candidates > Interview Scheduler** in the left-hand menu of the back-office interface. Then click the ③ icon.

How do I assign an interviewer to an interview schedule?

Access the 'Interview Schedules' screen by clicking **Candidates** > **Interview Scheduler** in the left-hand menu of the back-office interface. Open an interview schedule and click the *icon*. This displays the 'Interviewer' pop-up window.

How do I create a self-select interview schedule?

Access the 'Interview Schedules' screen by clicking **Candidates > Interview Scheduler** in the left-hand menu of the back-office interface. Add a new interview by clicking the icon. Then, under 'Schedule Type', click the 'Self Select' toggle button.

How do I cancel an interview through interview scheduler?

From the 'Candidates' section of the 'Interview Schedule' screen, click on the 🔯 icon next to the relevant candidate. This displays the 'Add Candidate to Slot' screen. Click the 'Release it' button to cancel the interview booking.

The technical bit...

System parameters

The System Parameters to be aware of in relation to creating and amending User accounts are listed below:

Parameter	Description
MULTI_INTERVIEW_AUTOMATED_CANDIDATE_ ALLOCATION_ENABLED	When enabled candidate will be automatically added to an interview schedule when progressed to a specific history type.
MULTI_INTERVIEW_AUTOMATED_INTERVIEW_ REMINDER_ENABLED	When enabled any candidate with a history record of type "INT" that also has a reminder threshold set and has not yet been reminded about their interview will receive an email reminder.
MULTI_INTERVIEW_AUTOMATED_INTERVIEW_ REMINDER_E_LETTER_ID	Specify an email template that will be sent to the candidate to remind them of their interview slot details.
MULTI_INTERVIEW_AUTOMATED_INTERVIEW_ SCHEDULE_CREATION_ENABLED	When enabled interview schedules will automatically be created when a job is made live.
MULTI_INTERVIEW_CAND_TABLE_ORDER_BY_ENABLED	When enabled the "order by" select box will be available to sort candidates by name and date on the interview scheduler screen.
MULTI_INTERVIEW_DECLINATION_NOTIFICATION_E_ LETTER_ID	Specify the default email template to be sent to the Interview Schedule owner to notify them when a candidate declines an interview.
MULTI_INTERVIEW_DEFAULT_DURATION_INTERVAL	Define the default intervals for the allowed duration time.
MULTI_INTERVIEW_DEFAULT_DURATION_MINUTES	Define the default number of minutes that each interview scheduler slot will take.
MULTI_INTERVIEW_DEFAULT_LOCATION_LOV_ID	When an LoV is selected for this parameter, the default location field on the interview scheduler header section will become a dropdown list containing the values stored within the specified LOV.
MULTI_INTERVIEW_DEFAULT_TIME_EARLIEST	Specifies the earliest point in time where an interview can take place, times must be in format HH24:MI. Defaults to 6:00am.
MULTI_INTERVIEW_DEFAULT_TIME_INTERVAL	Define how much time is left between time slots.
MULTI_INTERVIEW_DEFAULT_TIME_LATEST	Specifies the latest point in time where an interview can take place times, must be in format HH24:MI. Defaults to 10:00pm.
MULTI_INTERVIEW_DFLT_CANDIDATE_ CONFIRMATION_E_LETTER_ID	Specify the default email template that will be sent to a candidate when the confirmed an interview slot

System parameters continued...

Parameter	Description
MULTI_INTERVIEW_DFLT_CANDIDATE_CONFIRMATION_ TRACK_TYPE_ID	Specify the default track_type_id that a candidate will be progressed to once they have confirmed an interview slot.
MULTI_INTERVIEW_DFLT_INVITE_TO_INTERVIEW_ E_LETTER_ID	Specify an email template that will be sent to the candidate to invite them to select an interview slot
MULTI_INTERVIEW_DFLT_INVITE_TO_INTERVIEW_ TRACK_TYPE_ID	Specify the default track_type_id that a candidate will be progressed to once they have been invited to select an interview slot.
MULTI_INTERVIEW_DFLT_SELECTION_TRACK_TYPE_ID	Specify the default selection track_type_id that will be used to populate an interview schedule.
MULTI_INTERVIEW_DISABLE_INTERVIEWER_ NOTIFICATIONS	Prevents interviewers being CC'ed or BCC'ed into interview scheduler emails.
MULTI_INTERVIEW_DOC_ATTACH_ENABLED	Enable documents from the desktop, document library and documents stored against the job to be attached to the invitation to interview emails sent by the interview scheduler.
MULTI_INTERVIEW_EMAIL_PREVIEW_ENABLED	Enable email preview during the scheduling of inter- views. Not compatible with MULTI_INTERVIEW_SLOTS_OVERRIDES_ENABLED.
MULTI_INTERVIEW_EMAIL_TEXT_LEVEL	Allows for the configuration of the content and format of the interview schedule slot detail text that replaces occurrences of the [interview_schedule] tag when used in emails sent from the interview scheduler. The text is made up of a list of label/value pairs each presented on a new line. Possible values: 0, 1, 2. Setting this parameter to value 0 results in the following label/value pairs: the date of the interview, the time of the interview.
	Additionally there are also label/value pairs that will only be included if a value has been set, these are: the duration, the name of the main interviewer, all other interviewer names, the location, and finally the comments. Setting this parameter to value 1 results in the same behaviour as level 0 except with the addition of the interviewer's job title in brackets after the interviewer's name. Setting the parameter to value 2 results in the same behaviour as level 0 except none of the interviewers are included.

System parameters continued...

Parameter	Description
MULTI_INTERVIEW_ICS_CANCEL_E_LETTER_ID	The email template that will be used for emails sent to the candidate when an interview slot is released.
MULTI_INTERVIEW_IGNORE_CONFLICTS	Set this to prevent any interviewer conflict checking being performed within interview schedules.
MULTI_INTERVIEW_IGNORE_CONFLICTS	Set this to prevent any interviewer conflict checking being performed within interview schedules.
MULTI_INTERVIEW_LOCATION_LOV_OTHER_ID	If the system parameter MULTI_INTERVIEW_DEFAULT_LOCATION_LOV_ID is configured to use an LoV, this system parameter can be used to define one of the options within the LoV as an "other" (not in list) default location. When a user selects this value within the interview scheduler, a free text default location field will be displayed next to the drop down.
MULTI_INTERVIEW_MODES_ENABLED	Allows for interview schedules to be created that allow the candidate to select which interview slot that would like to attend.
MULTI_INTERVIEW_MULTI_SLOT_ALLOCATION_ ENABLED	When enabled allows interview schedules to allocate more then one candidate to each slot.
MULTI_INTERVIEW_NOTIFY_INTERVIEWERS_ CANCELLED_INTERVIEW_E_LETTER_ID	Indicates email template to be used for interview cancellation emails sent to interviewers.
MULTI_INTERVIEW_NOTIFY_INTERVIEWERS_ENABLED	Sends email notifications to every interviewer on finalisation of a schedule
MULTI_INTERVIEW_NOTIFY_INTERVIEWERS_E_ LETTER_ID	The e_letter_id (PK) of the email library entry to be used when sending notifications to interviewers
MULTI_INTERVIEW_SLOTS_ENABLED	Enable the entry of detailed interview schedules for candidates
MULTI_INTERVIEW_SLOTS_OVERRIDES_ENABLED	Enable the override output tracking type and override notify selections that appear per candidate. NOT COMPATIBLE WITH MULTI_INTERVIEW_MAIL_PREVIEW_ENABLED.

System parameters continued...

Parameter	Description
INTERVIEW_ADD_HIST_USE_SCHEDULER_ DROPDOWNS	Enables use of the Interview Scheduler-style interview details dropdowns when adding interview history records, e.g. Start Time and Duration.
INTERVIEW_ICS_EMAIL_ATTACHMENT_ENABLED_ SINGLE	Enables sending of an ICS (calendar) file when adding an interview history record for a candidate.
INTERVIEW_RESOURCE_CHECKLIST_ENABLED	Enable creation of resource checklist required for interviews, to be viewed as a PDF document
INTERVIEW_SELECTOR_ENABLED	Enable interviewer selector to assign users to predefined roles. Requires JOB_POST_INTERVIEWERS_ENABLED to be enabled
JOB_POST_INTERVIEWERS_ENABLED	If enabled then users populate the interviewer selector instead of having to create interviewer records.
JOB_POST_INTERVIEWERS_JOB_OWNER_ENABLED	If enabled then the current job owner is added to the list of interviewers for a job. The functionality of this parameter is dependent on: JOB_POST_INTERVIEWERS_ENABLED also being enabled.

Need further help?

The Hireserve Hub

The Hireserve Hub is an online resource centre for customers, where you can browse past release notes and user guides, watch webinar recordings, register for customer events, find details of upcoming system maintenance and more.

You can access the Hireserve Hub here: https://hireserve.com/hireserve-hub

You will need this password: HsHbTS31*

Your System Administrator

If you're a hiring manager looking for support with Hireserve ATS/Unit4 Recruitment, your first port of call will be your System Administrator.

Your System Administrator is likely to be a member of your HR or Recruitment team who will be able to answer many of the questions you may have about the system.

If your System Administrator is unable to help, they will then get in touch with the Hireserve team on your behalf.

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The Hireserve team

There are many ways to get in touch with the Hireserve team!

One of the easiest is through Live Chat:

- 1. Select the question mark icon in the top-right of your Hireserve ATS back-office dashboard.
- 2. Select 'Live Chat'

If you have a system support query, you can let the team know by submitting a Customer Care request:

- 1. Select the question mark icon in the top-right of your Hireserve ATS back-office dashboard.
- 2. Select 'Submit Customer Care request'

And of course, we're also available by phone or email:

Drop us an email: support@hireserve.com

Give us a call: 01256 634 140

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