

# Your guide to Hireserve ATS: Online Interview Link functionality

Save time on online interview administration



## Introduction

We have released an enhancement in the ATS to enable you to share Online Interview Links either through the interview scheduler or directly from the 'Candidate Details' screen.

With the current restrictions on face-to-face meetings, this functionality makes sharing joining details for online interviews with candidates much easier.

The new functionality can be used with the Interview Scheduler and when booking Tracking Type interviews via the 'Candidate Details' screen, in both the Recruiter Portal and Hiring Manager Portal.

## What you'll learn from reading this guide

In this guide, you'll learn:

- ✓ How to create a new Online Interview Link using Microsoft Teams or Zoom
- ✓ Best practice recommendations for configuring your online interview
- ✓ How to configure online interview schedules and send Links to candidates

We hope you find this document useful, but please do contact the [Customer Care team](#) if you need any further assistance.

### Disclaimer:

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

# Contents

## **Creating Zoom and Microsoft Teams links for online interviews**

Zoom	<a href="#">3</a>
Microsoft Teams	<a href="#">4</a>

## **Adding your Online Interview Link to the system**

Overview	<a href="#">6</a>
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## **Sending your Link to candidates**

Configuring your email templates	<a href="#">7</a>
Configuring your ICS file	<a href="#">7</a>

## **Adding an Online Interview Link to Tracking Type interviews**

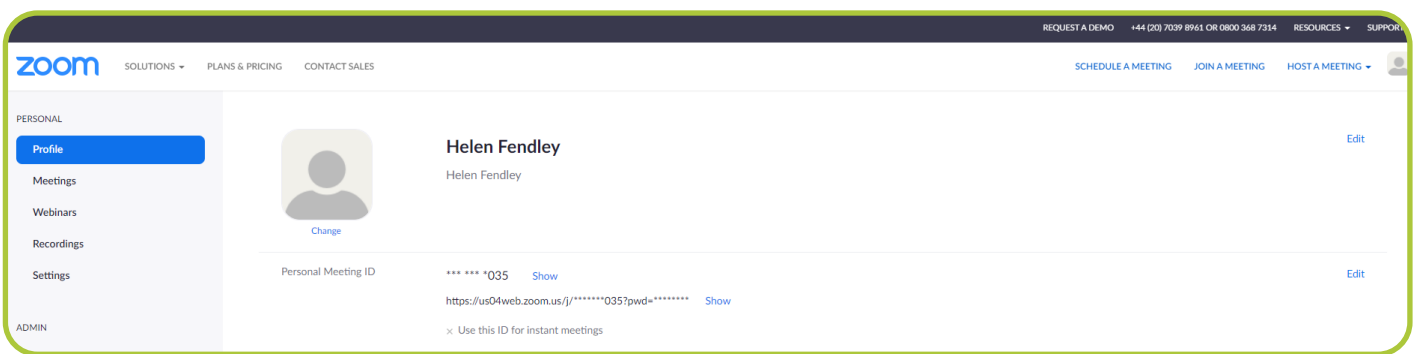
Overview	<a href="#">9</a>
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# Creating Zoom and Microsoft Teams links for online interviews

## Zoom

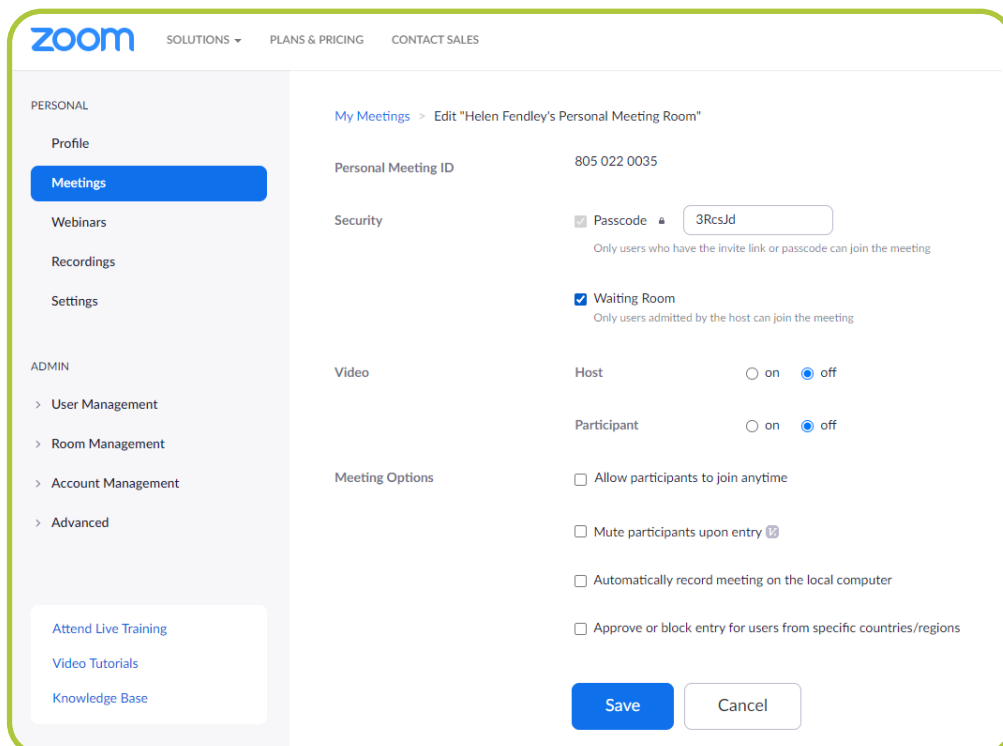
Creating a Zoom account will automatically create a personal meeting URL.

You can access this URL by opening your Zoom Profile page. Click 'Show' next to the long link beginning with 'https://us04web.zoom.us'. Copy this link and paste it into your '[Meeting Room URL](#)' field.



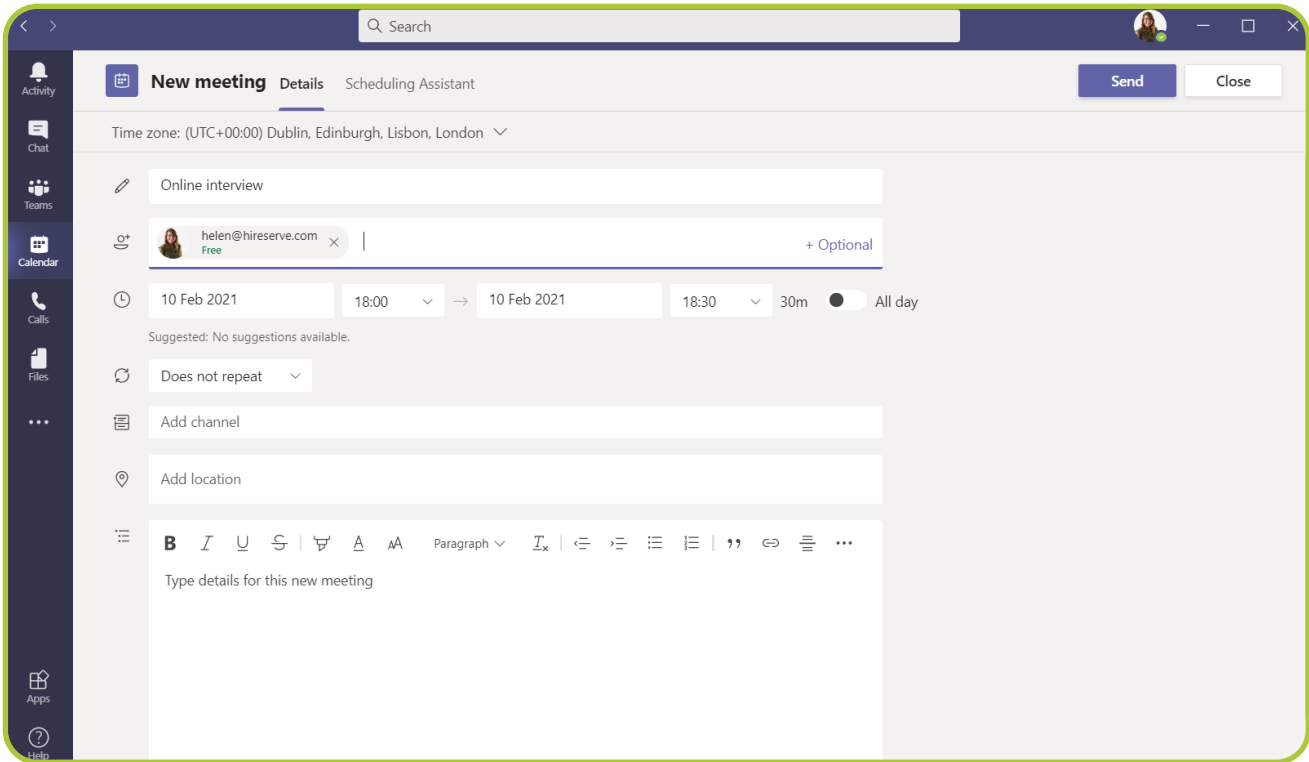
When using a Zoom link for interviews, we recommend using the 'Meetings' settings to enable the Waiting Room. This ensures that only people that have your permission to join the interview can do so.

To do this, click 'Meetings' in the left-hand menu of the 'My account' section on the Zoom website, and then click the 'Personal Room' tab. Click 'Edit' and tick the 'Waiting Room' checkbox. Click **Save**.

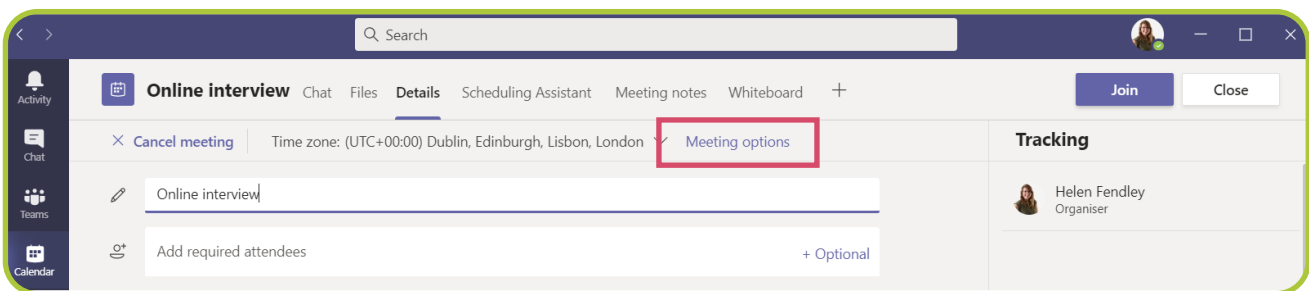


## Microsoft Teams

To use a Teams link, create a new calendar invite in the Microsoft Teams app. You can set the date and time for any time in the past or future, it will not impact access to the Teams meeting. Add your own email address into the 'Add required attendees' field. Click Send, and the meeting will automatically close.




Re-open the meeting in the Microsoft Teams app, and click the 'Meeting options' link next to the time zone information. This will open the Meeting Options in your web browser. If you don't see the 'Meeting options' link, double check that you have added yourself into the attendee field.

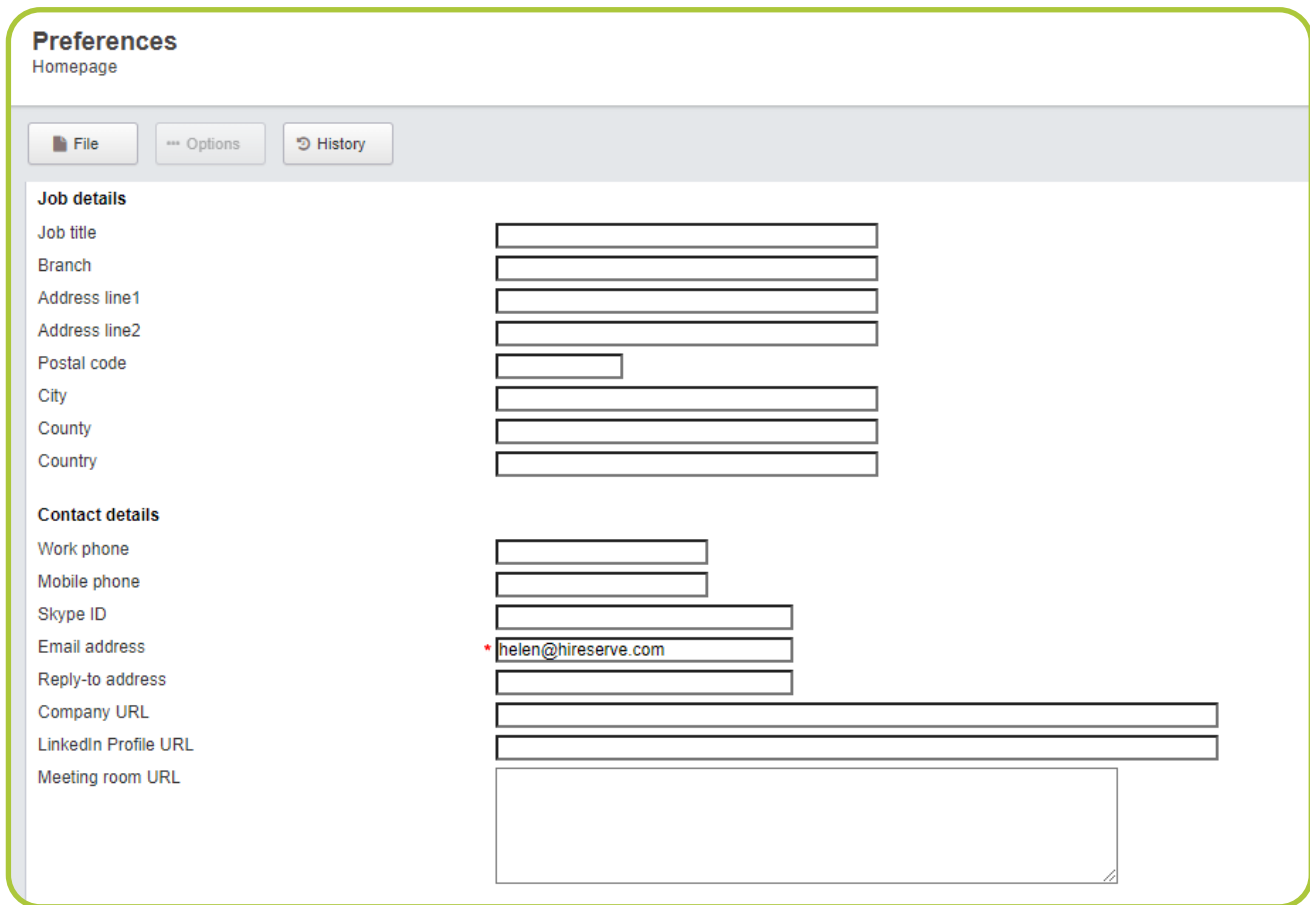




# Adding your Online Interview Link to the system

## Overview

To add the Interview Link into Hireserve ATS, click the  icon in the top-right of the ATS back-office, and select 'Account Settings'. You will see a new text box labelled 'Meeting Room URL'.



The screenshot shows the 'Preferences' page in the Hireserve ATS back-office. The page has a header with 'File', 'Options', and 'History' buttons. Below the header, there are two sections: 'Job details' and 'Contact details'. The 'Job details' section includes fields for Job title, Branch, Address line 1, Address line 2, Postal code, City, County, and Country. The 'Contact details' section includes fields for Work phone, Mobile phone, Skype ID, Email address (with a dropdown arrow and the text 'helen@hireserve.com'), Reply-to address, Company URL, LinkedIn Profile URL, and Meeting room URL. The Meeting room URL field is a large text box at the bottom of the contact details section.

Copy the meeting room URL from Zoom or Microsoft Teams and paste it into this text box. Click **File > Save**.



The screenshot shows a text box labeled 'Meeting room URL'. The text box contains a long URL: `https://teams.microsoft.com/l/meetup-join/19%3ameeting_MmMxMGFIMzUtMTA0MC00OTNkLWI0YThZDRkNWZmMTA0NzM1%40thread.v2/0?context=%7b%22id%22%3a%22abea3e59-333e-4898-9f2e-0a7c0cd7c7af%22%2c%22oid%22%3a%221dee24f0-041a-44b1-`

Now create a new interview schedule. Select 'Online' in the new 'Interview type' toggle to pull through the meeting URL of the main interviewer in the [email confirmation to candidates](#). You can configure the rest of the interview schedule as you normally would.



The screenshot shows a toggle for 'Interview type'. There are two radio buttons: 'In-person' and 'Online'. The 'Online' radio button is selected, indicated by a blue dot.

# Sending your Link to candidates

## Configuring your email templates

If you are using manual interview schedules or creating Tracking Type interviews from the 'Candidate Details' screen, you will need to include the merge field `[interview_meeting_room_url]` in your online interview confirmation email template. For more information on creating and editing email templates, head to the [Hireserve Hub](#).

You can also include the URL as a button by using our button merge field and beginning the URL merge field with `var_`.

For example, this:

Please join your online interview using the link below:

`[button:green:Start interview:var_interview_meeting_room_url]`

Becomes this:

Please join your online interview using the link below:



When using self-select interviews, the Interview Link will automatically be included within the `[interview_schedule]` merge field. For more information on using merge fields, head to the [Hireserve Hub](#).

## Configuring your ICS file

You can also configure an ICS file (a calendar invite) to include your Online Interview Link, which can be attached to the email sent to the candidate.

To create the ICS file to send to online interviewees, open the 'E-mail Library' screen by clicking **Configuration > Communications > Email Library** in the left-hand menu of the ATS. Click the icon to add a new template.

Complete the template with any information you'd like to include in the ICS file, including the URL merge fields mentioned above. You do not need to complete any of the 'Set-up mailheader' fields, aside from the 'Subject' field which will become the subject line of the calendar attachment sent to the candidate. Click **File > Save**.

The screenshot shows the configuration interface for an ICS file template. The fields are as follows:

- Name:** Online interview ICS
- Description:** Calendar attachment for online interview
- Enabled:**
- Linked tracking type:** Online interview
- Email context:** -- none selected --
- Template for HTML email:** Clockwork Email
- Set-up mailheader:**
  - From:** [Empty field]
  - To:** [Empty field]
  - Subject:** Online interview
  - Cc:** [Empty field]
  - Bcc:** [Empty field]
  - Reply to:** [Empty field]
- Set-up mailbody:** Plain Text Email Body
  - Text: Please find the details of your interview below.
  - Text: Name: [first\_name] [last\_name]
  - Text: Interviewing for: [job\_title]
  - Text: Job reference number: [refno]
  - Text: Date: [interview\_date]
  - Text: Time: [interview\_time]
  - Text: Meeting URL: [interview\_meeting\_room\_url]
  - Text: Please click the link below to join your interview:
  - Text: `[button:green:Start interview:var_interview_meeting_room_url]`



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Online Interview Link functionality

Next, head to the 'System Parameters' screen by clicking **Configuration > Customer settings > System Parameters**. Find the 'INTERVIEW\_ONLINE\_ICS\_EMAIL\_ATTACHMENT\_BODY\_E\_LETTER\_ID' parameter (you can do this by pressing Ctrl and F on your keyboard at the same time, and typing in the name of the parameter).

In the dropdown menu next to the parameter, select the ICS template previously created. Then click **File > Save**.

<b>INTERVIEW_ONLINE_ICS_EMAIL_ATTACHMENT_BODY_E_LETTER_ID</b>	Online interview ICS E71 - Reject after interview E72 - Reject and hold E73 - Confirmation of interview (interview Scheduler) E73 - Confirmation of online interview E73 - Confirmation of online interview (Scheduler) E73 - Confirmation of online interview(48336) E73a - Confirmation of interview (interview Scheduler);34905) E73b - Confirmation of 3rd interview (interview Scheduler);34905);34906) E74 - Offer E76 - Vacancy withdrawn E77 Candidate withdrawal (online) - confirm candidate E78 Candidate withdrawal (back office) - confirm candidate E79 - Offer withdrawn E80 - Reference request E81 - Confirmation of interview (non-Scheduler) EJ New Starter Email Interview cancellation Interview reminder Online interview confirmation Online interview ICS	Determines which template from the E-mail Library will be used as a template to generate the body of an ICS file, specifically and only for online interviews/schedules  Enable creation of resource checklist required for interviews, to be viewed as a PDF document  Setting this on (which is the default) will enable intranet-specific features to be enabled such as flagging Employees on candidate lists (applications, quickfind) and candidate details page. Also will govern the enabling of intranet-related options on job postings.  IP addresses allowed to administer this site  Days on which the specified IP addresses may access the back office and is a list of space separated days (1=sunday, 7=saturday) e.g. '2 3 4 5' for monday-thursday  When IP address restrictions are implemented do not apply them to Sysadmin users  Times during which the specified IP addresses may access the back office - format is hh:mi hh:mi e.g. for 9am to 5pm set a value of '09:00 17:00' - must be 5-character times  IP addresses allowed to browse the this site (use to restrict e.g. for pseudo-intranet)
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**Tip!**

The Interview Link sent to candidates in your interview confirmation email and ICS files will be the Meeting URL of the 'main interviewer' set for the interview.





# Adding an Online Interview Link to Tracking Type interviews


## Overview

If you are creating an interview using the Interview Confirmation Tracking Type from the 'Candidate Details' screen and would like to add an Online Interview Link to the confirmation email, you need to make some configuration changes to the Tracking Type itself.

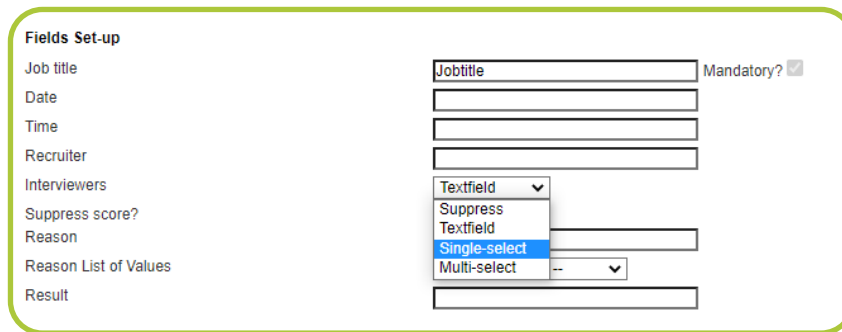
Click **Configuration > Workflow Settings > Tracking Types** in the left-hand menu of the ATS.

Click the  icon to edit an existing Tracking Type that you wish to use, or create a new Tracking Type by clicking the  icon. Add the name, Track Type (system) and any other details you wish to include, and click **File > Save**.

Under 'Interview settings', tick the 'Online interview' checkbox.



Next, set the 'Interviewers' dropdown to 'Single-select'. Click **File > Save**.



You can now progress the candidate to interview using the Tracking Type by clicking **Options > Progress** in the 'Candidate Details' screen.

Configure the details of the interview as you normally would, and use the 'Default email to send' dropdown to select the email template which contains the meeting room URL merge fields. These merge fields will pull through the meeting room URL of the user selected in the 'Interviewer' dropdown menu.

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