

Guide to Pipeline Automation

Automatically move candidates through your recruitment pipeline

When you're short on time (as most recruiters are), you want to be able to focus your time and energy on the most promising and qualified candidates. You also need a simple, fair and unbiased way to move the best candidates through your recruitment process quickly and easily. Often, it's clear that specific candidates should move to another stage in your recruitment process: for example, a candidate who meets the assessment score ranges should move to a phone screen or review stage, while a candidate who doesn't meet the minimum eligibility requirements for a role could be automatically disqualified and moved to one of the "not hired" stages.

The new pipeline automation rules enable you to set up actions based on how a candidate scores on their assessments, so you don't need to spend time reviewing each candidate's results and manually moving them. You can also automatically move candidates who don't meet the employment application requirements out of your main pipeline, to help focus your energy where it matters most.

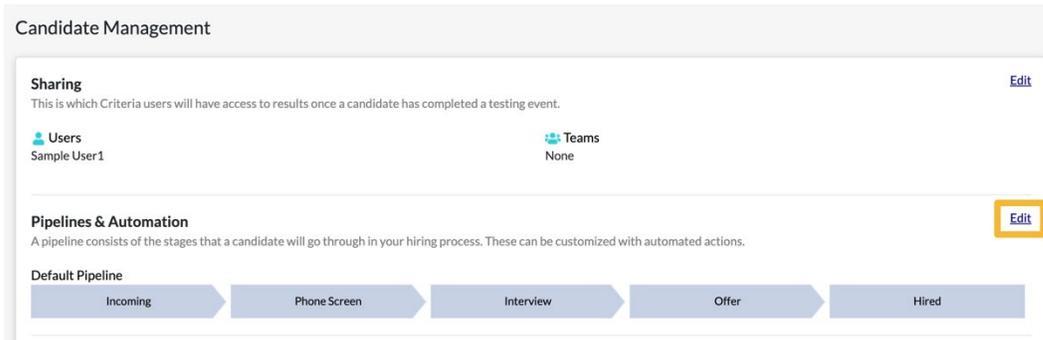
These features are available to all Criteria customers with a Professional or Enterprise subscription and can be accessed by any users with permission to create or edit jobs.

There are two types of automation rules available:

1. You can leverage **score ranges** on the assessment (either Criteria's standard ranges, or your own custom ranges) to move candidates to a further stage in your pipeline if the applicant's score fell within that range. You can use their score in relation to the range to move them to any stage of your pipeline.
2. You can create **disqualification filters** for your applications to automatically move applicants to other stages if they are disqualified based on their responses to one of your application questions. You can only move disqualified applicants to one of the "Not Hired" stages.

Using Score Ranges

1. Navigate to the **Jobs** page in the Criteria Platform, click the three-dot icon next to the job we'd like to set up automation for, and select **Edit**.
2. Scroll down to the Candidate Management section and select **Edit** next to **Pipelines & Automation**.

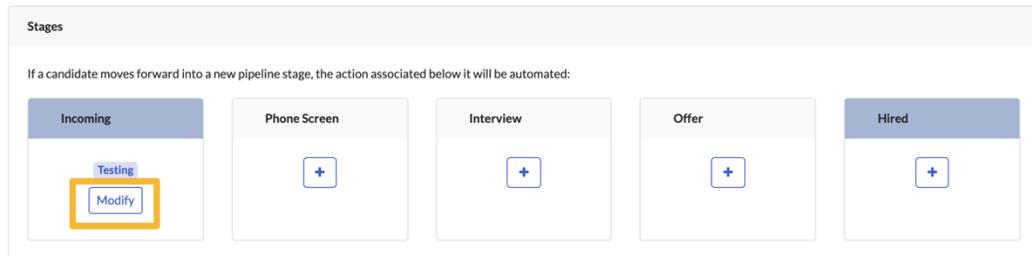


3. You can add automation to any pipeline stage that includes Testing. By default, the assessments will be included in the Incoming Stage. To add in an automation rule, click **Modify**.

Automation

You can setup automation in your hiring pipeline by adding an action.

Pipeline: Default Pipeline [Edit](#)



4. Scroll down in the resulting window and select **Add a Rule**.

Edit Pipeline Stage Automation

<p><i>Find candidates who can learn, adapt, and apply new information and communicate effectively.</i></p> <p>Benefits: Reduce onboarding costs, Increase productivity, Reduce turnover</p> <p>Measures: Critical thinking, Problem solving skills, Learning ability, Aptitude for applying new information</p> <p>SELECT A SCORE RANGE Compare candidate results with Criteria's job-specific benchmarks or your own.</p> <p>Computer Programmer/Software ... ^</p>	<p><i>Find candidates who are more likely to be comfortable in this job role and stay with your company longer.</i></p> <p>Benefits: Improve retention, More cohesive company culture</p> <p>Measures: A blend of twelve personality traits that are predictive of a person's work style</p> <p>SELECT A SCORE RANGE Compare candidate results with Criteria's job-specific benchmarks or your own.</p> <p>Software Engineering and Dev ... ^</p>
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Set Automated Rules

+ Add a Rule

5. This will open a menu that you can use to select which test you would like to set up automation for. You can use all of the tests associated with this job, or just focus on results for individual assessments. The score ranges that will be used for the automation are whichever score ranges are selected above.

Edit Pipeline Stage Automation

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Set Automated Rules

+ Add a Rule

6. After you have selected the tests you would like to use for the automation, you will need to indicate which stage of your pipeline you would like the applicant to be moved to if they score within the range associated with the test.

Set Automated Rules

Add a new rule

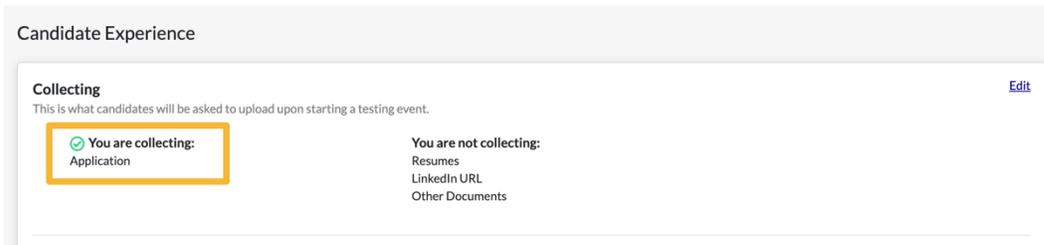
If the candidate has met the associated score range for...

Then, move candidate to...

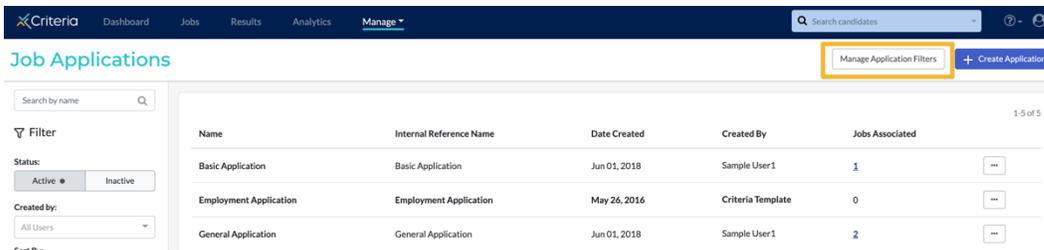
7. Once you have selected the stage, you can click **Add Rule** and **Save** to finish the setup process.

Using Disqualification Filters

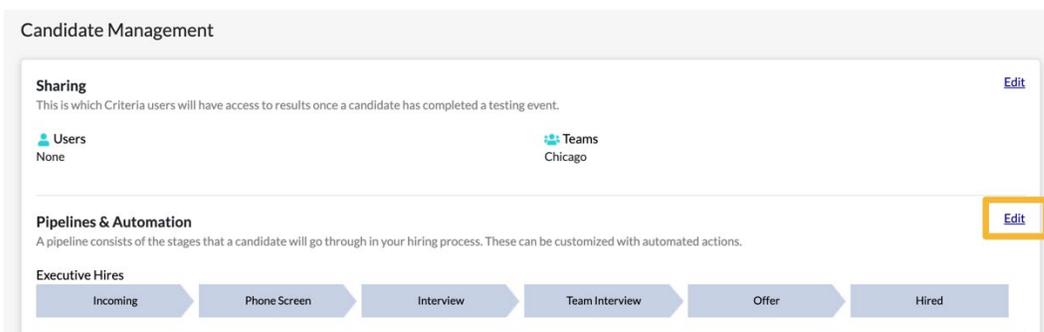
1. Navigate to the **Jobs** page in the Criteria Platform, click the three dots icon next to the job we'd like to setup automation for and select **Edit**.
2. You will need to ensure there is already an application that uses a disqualification filter associated with this job. You can view the application in use in the **Candidate Experience** section.



3. If you are unsure if there is a filter associated with this application, you can check by going to **Manage > Applications** and then selecting **Manage Application Filters**.



4. Once you've confirmed there is a filter associated with the job, scroll down to the **Candidate Management** section and select **Edit** next to **Pipelines & Automation**.



5. On this screen you will see the Application in the Incoming Stage. Click **Modify**.

- In the resulting window select **Application** and then select **Add a Rule**.

Edit Pipeline Stage Automation

Select an Action:

- Testing
- Application**

Application
Candidates will fill out this Job Application form when they click on the job link

Job Applications:
pipeline app [Preview](#)

Set Automated Rules
No rule added

[+ Add a Rule](#)

[Cancel](#) [Save](#)

- You can then select the stage you would like the applicant moved to if they are disqualified based on their responses on the application.

Edit Pipeline Stage Automation

Select an Action:

- Testing
- Application**

Application
Candidates will fill out this Job Application form when they click on the job link

Job Applications:
pipeline app [Preview](#)

Set Automated Rules
No rule added

Add a New Rule

If candidate... is Disqualified ⓘ

Then, move candidate to: **Select a stage**

- Rejected
- Withdrawn
- On Hold

[Cancel](#) [Add Rule](#)

[Cancel](#) [Save](#)

- Once you have selected the stage you can click **Add Rule** and **Save** to finish the setup process.

Additional Notes

- For pipelines with existing candidates: The pipeline rule processes at the completion of the test event. If the event is completed before the rule was set up, it will not apply to those candidates. If the candidate was in progress or had yet to complete their testing event, the rule will apply when the event is completed.
- Any pipeline stage that has automation associated with it will display an indicator in the pipeline setup area.



- You can use different combinations of score range and application filters for automation rules.
- Since testing can be placed in multiple stages of your pipeline, you have the ability to set up multiple automation rules for each stage that includes testing.