

# 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.
- 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**.

Sharing				
This is which Criteria users will have acc	ess to results once a candidate has com	pleted a testing event.		
💄 Users		😫 Teams		
Sample User1		None		
Pipelines & Automation	andidate will go through in your hiring p	rocess. These can be customized with	automated actions.	
Pipelines & Automation A pipeline consists of the stages that a c Default Pipeline	andidate will go through in your hiring p	rocess. These can be customized with	automated actions.	

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	Pipeline: Default Pipeline <u>Edit</u>						
Stages							
If a candidate moves forward into a new pipeline stage, the action associated below it will be automated:							
Incoming	Incoming Phone Screen Interview Offer Hired						
Testing Modify	+	+	+	+			



4. Scroll down in the resulting window and select 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.

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



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 R	tules		
Add a new ru	le		×
	If the candidate has met the associated score range for	× CCAT	× ×
	Then, move candidate to	Phone Screen -	
Add Rule			
			Cance Save

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.

ndidate Experience		
Collecting		Edit
his is what candidates will be asked to upload upo	on starting a testing event.	
You are collecting:	You are not collecting:	
Application	Resumes	
	Linkedin OKL Other Deservation	

 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.

XCriteria	Dashboard	Jobs Results	Analytics	Manage -		٩	Search candidates	• ?• 9•
Job App	lications						Manage Application Filters	+ Create Application
Search by name	Q							1-5 of 5
√ Filter		Name		Internal Reference Name	Date Created	Created By	Jobs Associated	
Status:	Inaction	Basic Application		Basic Application	Jun 01, 2018	Sample User1	1	
Created by:	macuve	Employment Applicat	tion	Employment Application	May 26, 2016	Criteria Template	0	•••
All Users	*	General Application		General Application	Jun 01, 2018	Sample User1	2	

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**.

Sharing		Ed
This is which Criteria users w	Il have access to results once a candidate has completed a testing event.	
Lusers	🏩 Teams	
None	Chicago	
		A
Pipelines & Automation		Ed
Pipelines & Automation A pipeline consists of the stag	I es that a candidate will go through in your hiring process. These can be customized with automated actions.	Ed
Pipelines & Automation A pipeline consists of the stag Executive Hires	t es that a candidate will go through in your hiring process. These can be customized with automated actions.	Ed

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



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

Edit Pipeline Stage Automation	
Select an Action: C 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
	<u>Cancel</u> Save

7. 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:	Application
C <sup>®</sup> Testing	Candidates will fill out this Job Application form when they click on the Job link
Application	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 -
	Cancel Add Rule Withdrawn On Hold
	Cancel Save

8. 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.



Incoming	
Testing	
Application	
Modify	

- 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.

