Scheduling Interviews

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Terminology: Events and Bookings

Interviews (Events in PageUp terminology) can be scheduled individually or in bulk for phone interviews, Zoom (video) interviews or in person interviews. You will need to know the location and time slots available for your interview before creating an Event.

An Event determines the type of interview and interview details. It must be created before you can invite a candidate to interview through PageUp.

A Booking is an invitation for a candidate to interview. In other words, you are Booking an Event for a candidate.
Where to Set Up an Event

Step 1: Navigate to the Events section under the hamburger dropdown menu to the right your dashboard.

Step 2: Select New Event. This will trigger the New Event window.

How to Fill Out Event Details

Fill out the Event details accurately then select save to allow you to add timeslots. All fields followed by the binoculars icon must be validated by selecting the lookup field and selecting the correct choice.

- **Title:** The title should be as follows: **Position Title, Requisition Number, Interview Type**
  
  - Example: Administrative Specialist 492274 Telephone Interview

  DO NOT use the position title as the only item in your title; there needs to be a unique identifier (the requisition number) to differentiate your position from another position with the same name.

- **Event Type:** Select either In Person Interview or Phone or Video (Zoom, Skype, Webex) Interview

- **Venue:** The venue should either be the physical location if it is an in person interview or Phone or Video if it is a phone or virtual interview.

  Please see the [How to Select or Create a Venue](#) section below for instructions on locating the correct venue.

- **Job:** Type in the requisition number for the correct job title to populate in the field.

- **Owner:** The owner is typically the hiring manager.

- **Add owner as user:** Yes

- **Contact name:** This would be the person to contact if an invited candidate has a question.

- **Public instructions:** Instructions on directions to the building, which door to enter, office to go to, etc.
Step 3: Select Save to enter timeslots. This applies whether you are assigning a specific time and date for the interview or setting up options for the applicant to select from.

Please see the How to Add Timeslots section below for instructions on accurately entering timeslots.

Below is an example of what your event details should look like.

<table>
<thead>
<tr>
<th>Event details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title:*</td>
</tr>
<tr>
<td>Event type:*</td>
</tr>
<tr>
<td>Venue:*</td>
</tr>
<tr>
<td>Job:</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Owner:*</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Add owner as user?:</td>
</tr>
<tr>
<td>Contact name:</td>
</tr>
<tr>
<td>Public instructions:</td>
</tr>
</tbody>
</table>
How to Select or Create a Venue

Step 1: Click the Binocular Icon next to the Venue box. Many venues are listed within the system, please choose appropriately. If your venue is not listed, proceed to Step 2.
Instruction Guide

Step 2: Click on Add new venue to prompt the New venue window.

Venue name: This should be room number and building for on-campus locations. Otherwise, this should be street address and room number.

Street, City, Zip, Country, State, Location: These should be filled out accurately.

Guidance: This information would be any relevant directions a potential candidate would need to find the venue location.

Active: Yes

Hide address from applicants: No

Contact name: You will need the name of the person the applicant will receive a call from (phone screen) or the person to ask for when arriving for an onsite interview.

Phone No. (number), Fax, Cell, Email: These should be filled out accurately and relate to the person listed in the Contact name field.

Suitable event type: Select the option that aligns with your interview type.

Step 3: Select Save and fill the remaining fields of the New Event window.

Refer back to How to Fill Out Event Details for more information.

**It is crucial that you make sure the event type and the event you invite the candidate to join are the same level (ie... Telephone Interview, invite status change to Phone Interview/Screen)**
How to Add Timeslots

After saving the Event, timeslots can be added in bulk or as a single timeslot. Candidates are able to select confidentially select times without seeing other candidates names or selections.

Add a Single Timeslot

Single timeslots are used if you have multiple days with variable time availabilities. (Example: Monday at 2:00-3:00pm, Tuesday at 1:30-2:30pm, Wednesday at 9:00-10:00am)

Complete the following fields then select Add to enter a single timeslot.

**Event date:** The day the interview is being held.

**Start time:** The time you expect the candidate to arrive. Be careful about AM/PM.

**End time:** The time the interview should end. Be careful about AM/PM.

**Users:** This is not generally used.

**Positions:** ALWAYS 1

***NOTE: A number greater than 1 will allow multiple candidates to sign up for the same timeslot. You only want one candidate per timeslot.
Add Bulk Timeslots

Bulk timeslots are used only if you have multiple days with the same time availability for each day. (Example: Monday, Wednesday, and Thursday at 1:00-2:00pm)

**Step 1:** Select **Add** next to **Add bulk timeslots**. A field will drop down to allow you to add timeslots.

**Step 2:** Fill in the **From** and **To** dates.

- **From:** The date of the FIRST interview
- **To:** The date of the LAST interview

**Step 3:** Select the days of the week the manager is available.

**Step 4:** Fill in the **Start time** and **End time** for each available timeslot. Remember, the time you fill in will apply to each day you selected above.

**Step 5:** Fill in the remaining fields and selections

- **Positions** in **ALWAYS 1**
- **Users/Invite:** This is not generally used.
- **Active:** Yes

**Step 6:** Once the timeslots have been populated, select **Add**.

***NOTE: A number greater than 1 will allow multiple candidates to sign up for the same timeslot. You only want one candidate per timeslot.***
How to Invite the Applicant to Interview

Step 1: Move the identified candidate’s status to Phone / Video Interview Event Booking or In Person Interview Event Booking. This will prompt the Confirm status change window.

Steps 2: What Needs to be Filled in the Confirm status change window

- Create an event booking invitation for applicant: Yes
- Event: Select an event and enter the title you previously created for the interview. Once entered, the event details will appear in a box directly below.
- Event timeslot: Allow applicant to choose the time slot
- Accept the booking on behalf of the applicant: No

Step 3: Select Move now
Applicant’s View of Event Booking Invitation

The applicant receives an email when their status move to Phone / Video Interview Event Booking or In Person Interview Event Booking is completed. The email instructs them to log in to their applicant portal where they will see an invitation to schedule their interview.

When the applicant selects Make a booking, they will be given the option to elect the time and date they are available for the interview.

The owner of the Event will be notified when the applicant accepts the interview.

Owner's View of Booked Events

Click on the hamburger drop down menu to the right of the dashboard.

Navigate to the Events selection and click Manage Events to prompt the Manage events window.

You will have three tab options: Calendar, Events, and Timeslots.
Instruction Guide

Calendar Tab

Selecting Calendar will show you all of your events currently scheduled in a calendar format.

Events Tab

Selecting Events will populate a list of all your currently scheduled events. You will have the option to edit or delete your events under this tab.

Timeslots Tab

Selecting Timeslots will populate a complete list of every timeslot of every event you have created in the system. You will also have an option to add the timeslot to your calendar and see who was invited to the event.

NOTE: Many users have found that scheduling is a difficult process in finding time for Search Committee as well as Candidates and Hiring managers. It may be easier to call and arrange timing of interviews outside of the system, and then send the invite from the system for the applicant to accept. *It is crucial for compliance purposes to still complete scheduling through the system, but necessary arrangements may be made outside of the system if properly documented and noted.