Pipeline Interview Type & Status

Configuration · https://learning.pcrecruiter.net/site/docs/configuration/interview-status-codes/

Pipeline Hierarchy Structure

Interview Types serve as the primary hierarchical structure within the Pipeline, while Interview Status Codes operate beneath them to provide more detailed definitions for each stage. For example, placing a candidate in an "In-Person" Interview Type signifies they are in a face-to-face interview stage for a position. The Interview Status Code then further specifies where in the interview process, such as "1st In Person Interview" or "2nd In Person Interview."

It's important to note that any changes made to these components will affect all positions, both existing and going forward, for all users.

Renaming and Hiding Unused Categories

You can easily adjust the main structure of your pipeline by changing the names or hiding certain Interview Types. This lets you simplify or expand your pipeline for maximum efficiency and effectiveness.

In the Legacy Pipeline, renaming or hiding impacts historical data. For instance, renaming 'Resume' to 'Submitted' will change all current 'Resume' records to 'Submitted.' Caution is advised when repurposing Interview Types with historical data.

1. Click "System" on the main toolbar.
2. Click "Database Setup."
3. Choose "Pipeline Setup."
4. Select "Rename Interview Types" from the actions menu.
5. Enter a new label for each Interview Type by adding a "Code" and "Description".
6. Click "Hide" to remove unused Interview Types from the Pipeline view.

7. Click "Save".

Customizing Pipeline Status Codes

Below each Interview Type, create custom Interview Status Codes to offer detailed insights into a candidate's progress. These codes will be displayed as subfolders under the selected Interview Type.

1. First, rename your Interview Types as needed.
2. Click "System" on your main toolbar.
3. Select "Database Setup."
4. Choose "Pipeline Setup."
5. Click the "Add" action icon.
6. Enter a "Code" (10 characters or less) that will be displayed below the "Interview Type".
7. Provide a brief "Description" for the entered Code.
8. Link it to the Interview Type (top level) under which this code will appear.
9. Choose "Priority" to establish the order (either alphabetically under the "Interview Type" or as specified by a numerical order).
10. Click "Save."
11. Repeat these steps until all codes are entered.

In the Legacy Pipeline, modifying or deleting an existing status code does not affect historical data. The original status is preserved, and current records remain unaltered, staying under the original Interview Type without being nested within a subfolder.