

Video Interview Guidelines

28th May 2020

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Introduction to Video Interviewing (VI)

Video interviews are made up of a series of templates and a template is made up of a specific component, for example;

- **Question template**
Questions are asked in text format, allowing the candidate to respond via video.
- **Media**
A question is asked via video, creating the feeling of a face to face interview.
- **Page template**
Allows you to break up the interview, perhaps a page providing an introduction or some guidance. Media can be added to page templates.

Once you have created an interview it will be added to the position you are recruiting for so that you can invite candidates to complete it (Positions are explained in greater detail further into the guidance.).

The video interview platform contains a set of default templates for you to use or you may decide to create your own templates from scratch, however, this is a more advanced feature.

Integrated & Stand-Alone explained

The video interview platform can be used on a stand-alone basis or it can be integrated and used with the ATS.

- The integrated platform combines the use of the ATS and the VI platform together. The ATS allows you to navigate to the video interview platform directly to create a video interview. Once the video interview has been created, you will revert to the ATS to add it to the relevant job so that you can invite candidates to complete it.
- The stand-alone platform is used in isolation and does not incorporate the use of the ATS at all. Video interviews are created and sent to candidates directly from the VI platform, you can also process your candidates and communicate with them via email.

User access

Access to VI has to be granted initially by Tribepad and this is once you have agreed to use the platform.

The agreement process is usually supported by your Tribepad Account Manager and they will discuss user type access and restrictions with you (also included further in this guidance in a bit more detail).

Device and browser requirements

The video interview platform supports the use of most devices and browsers however, to ensure you and your candidates have the best possible experience we recommend use of the following:

If you are using a desktop

- **Chrome**
- **Firefox**
- **Safari v11+**
- **MS Edge* (support is dependant on having applicable media drivers installed)**

If you are using Android

- **Chrome**
- **Firefox**

If you are using iOS

- **v11+**
- **Safari**

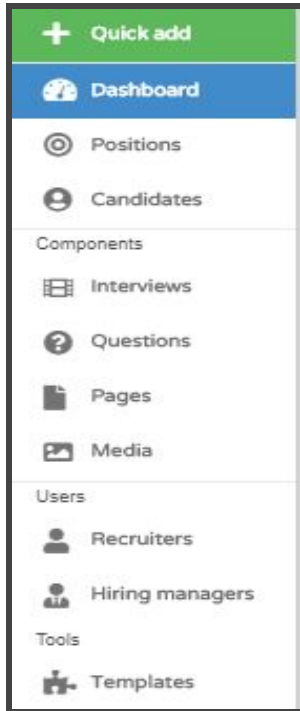
Where not explicitly stated, we support the current version, plus the last version of each browser.

VI menu navigation

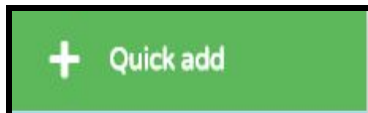
When you login to the VI platform you will be presented with a menu down the left-hand side of your screen.

The menu will allow you to navigate to the entire platform.

You will find an overview of each menu item below.



+Quick Add



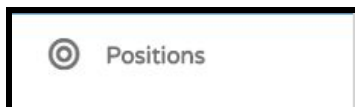
The Quick add button allows you to create a video interview using a much quicker process. You would not need to create any templates if you did not wish to.

Dashboard



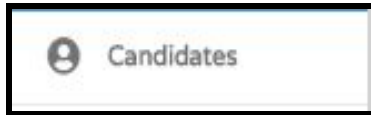
The dashboard button provides you with an overview of your account activity, allowing you to see recent data around your active positions.

Positions



The positions button will contain a library/list of roles that you have previously or are currently recruiting for. The interview that you create will be assigned to the relevant position so that you can invite candidates to carry out the interview.

Candidates

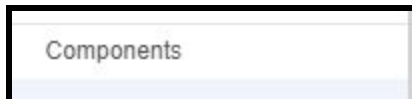


The candidates button will only contain a list of candidate names that have been invited to a video interview via the VI platform (if being used as stand-alone).

You can search for candidates and take a look at their profile, you will also be able to see what position they are aligned to.

A screenshot of a user profile form. At the top left is a circular profile picture placeholder. To its right, the name "Michelle Clarke1" is displayed in a large font, followed by the email address "michelleclarke1@yopmail.com" in a smaller font. Below the profile picture is a smaller circular placeholder. To the right of this placeholder are three input fields: "Email / Username" with the value "michelleclarke1@yopmail.com", "First Name" with the value "Michelle", and "Last Name" with the value "Clarke1". Below these fields is a "Change password" section with a text input field containing "*****" and a small icon to its right. Underneath the password field are two buttons: a blue "Update" button with a checkmark icon and a white "Reset" button. At the bottom, there is a section labeled "Appears in:" followed by a dropdown menu currently showing "HR Manager".

Components



The components menu is made up of Interviews, Questions, Pages and Media.

- **Interviews**

The interview library contains details of every interview template that has been created. If you select the name of the interview you will navigate to a new screen which allows you to make changes to that interview, such as adding or removing questions.

- **Questions**

The questions library contains a list of individual questions that have been created to add to an interview. Each question can be used for as many interviews as you would like. If you select the question name, you will navigate to a screen which allows you to make changes to the question.

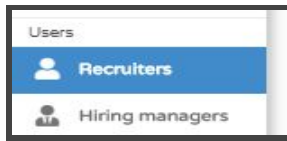
- **Pages**

The pages library contains a list of individual pages that have been created. Pages can be used to provide a candidate with information during their video interview. A page could be created to welcome the candidate and provide some guidance. The page name can be selected and you will navigate to a screen that will allow you to review the page in more detail and or make changes.

- **Media**

The media library contains any media that has been uploaded to the video interview platform. Media can be in the form of a video or image. If you select the name of the media, you will navigate to screen which will allow you to review or update the media.

Users

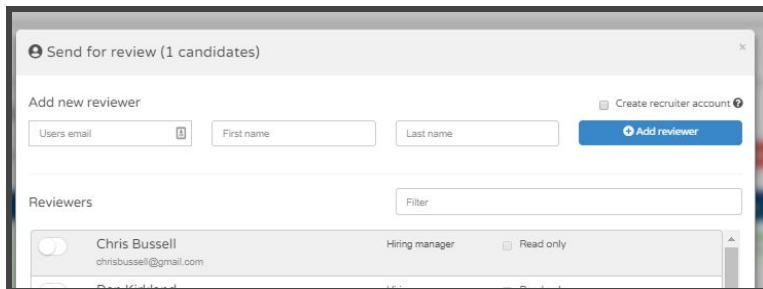
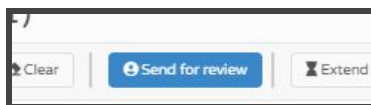


When using the VI platform on a stand-alone basis;

A recruiter is the main user of the video interviewing platform and may create video interviews and assign them for review by other users. The recruiter user will need to be created manually within the VI platform by selecting the 'Recruiter' option. The recruiter will need to assign themselves to the candidates video in order to review it.

A hiring manager will have restricted access and will need to be assigned to the video interview in order to review it (watch the videos, score and make comments), the hiring manager will need to have a profile added manually by selecting the Hiring manager's menu item.

A user can also be created when you select to send a video interview for review.



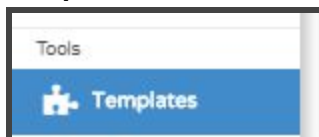
When using VI as an integration with your ATS

Access to the VI platform is driven by the ATS user type and is entirely dependent on whether you want that specific user type to be able to access the VI platform and create video interviews etc.

It could be that you have hiring managers that do not have an ATS account, in this scenario, you could send the video interview to the hiring manager by assigning it to them in the VI platform and creating a hiring manager account (this would not provide access to the ATS & it would only provide access to that specific video). Perhaps your hiring manager does have access to the ATS and you only want the hiring manager to be able to view video interviews.

You can discuss user types and access with your Tribepad Account Manager.

Templates



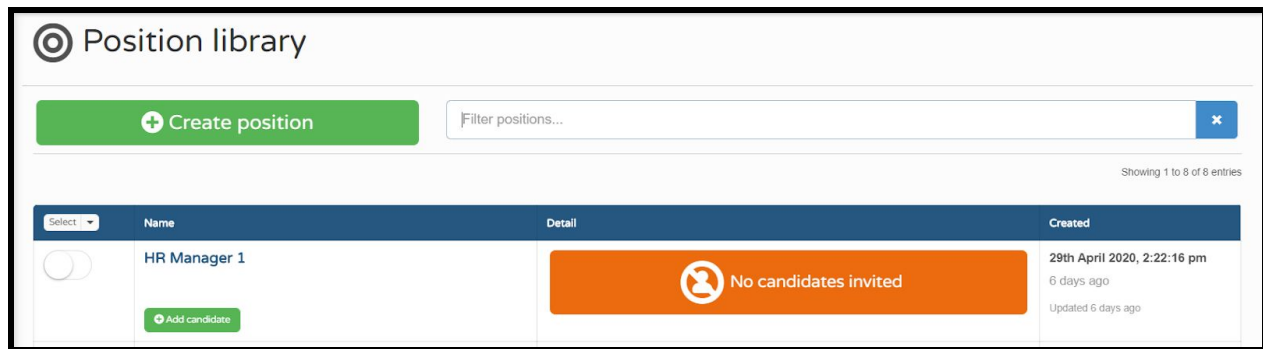
Question and page templates can be used to customise and create individual questions and or pages to add to a video interview.

Templates are great if you are trying to streamline the look and feel of your interviews as they can be used on as many interviews as you would like and if you don't want to use the default templates provided. Creating your own templates is more advanced.

Templates also incorporate invites and emails, which can be created to streamline candidate communications via the stand alone video interview platform.

Position navigation in more detail

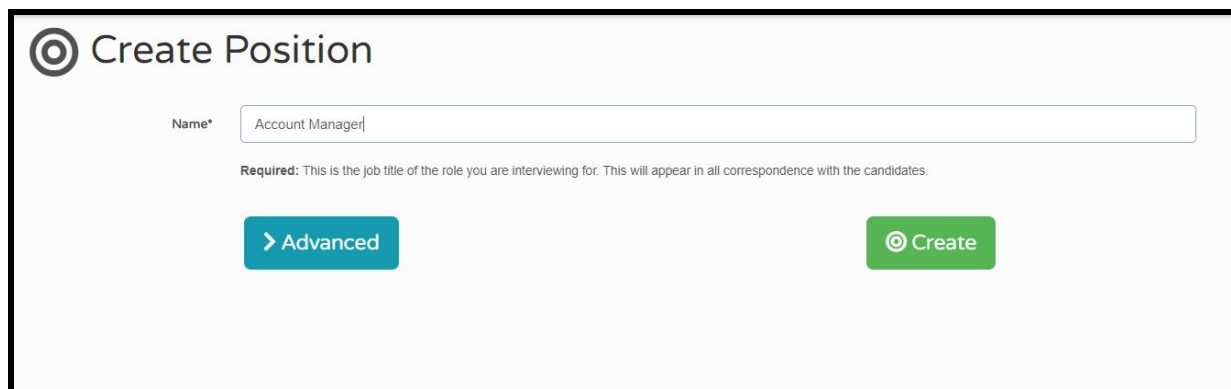
Let's take a look at the actions that you can take when you create a position in a bit more detail.



+Create Position

If you select this option you will be able to create a position manually and you would only do that if you are using VI as a **stand-alone platform** (creating a position allows you to add your video and then invite candidates directly from the VI platform, this isn't necessary if you are using VI as an integration with your ATS.).

If you are using VI as an integration with your ATS, the position is created automatically when you add the interview to a job in the ATS.



Detail

The detail shows the status of candidate's interviews (have they been started or completed etc).



If candidates have been invited to carry out the interview you will be able to see the following options as shown in the image above.

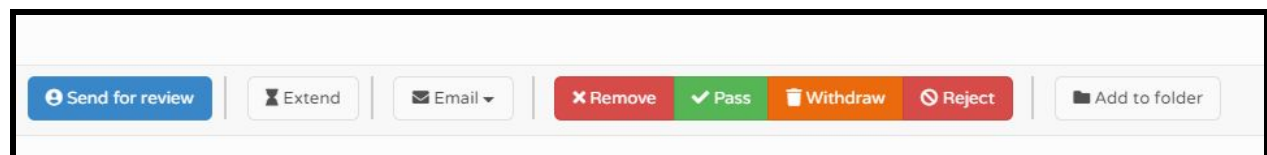
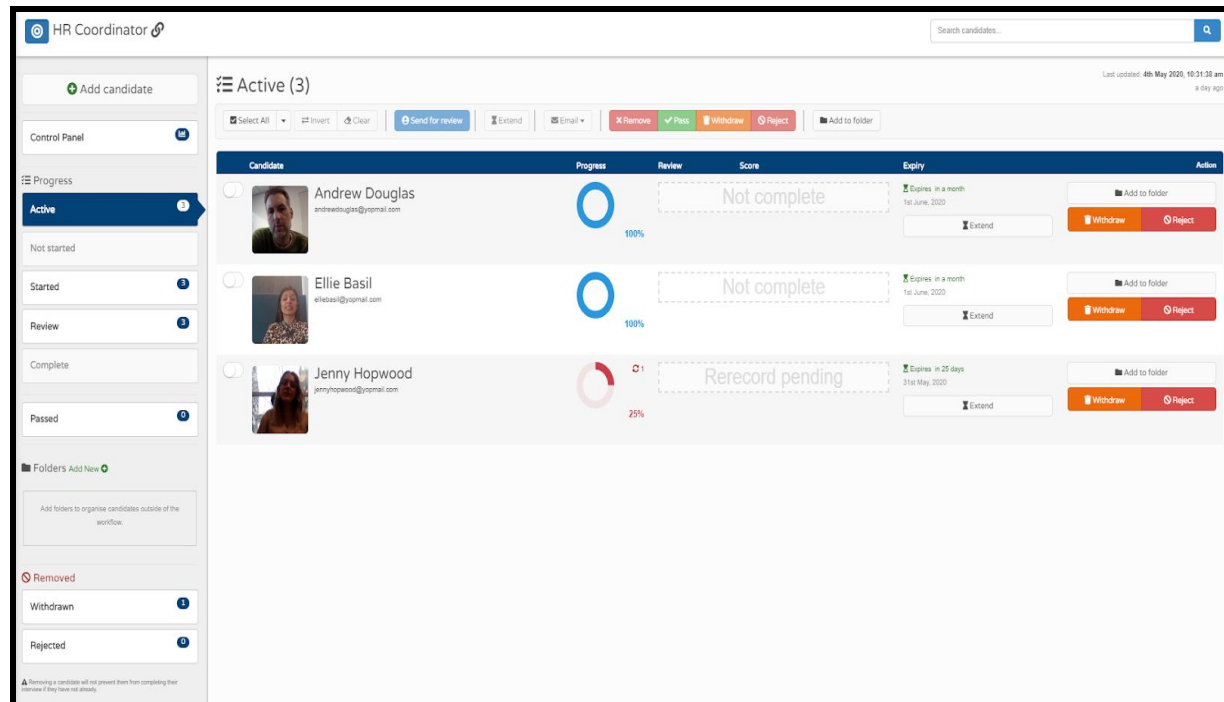
You can select any of these options to start reviewing candidate videos.

- **Active**
- **Started**
- **Review**
- **Complete**

Candidates are filtered into the relevant folder on the left-hand side of the screen depending upon the status of the video interview.

If there are not any candidates in a particular folder, the folder will not be available to select.

Each folder that contains candidates will also provide various buttons that allow you to carry out processing actions.



- **Send for review**
Allows you to send a video interview to be reviewed (the interview will also need to be assigned).
- **Extend**
Allows you to extend the date that a candidate must complete their video interview by.
- **Email**
Allows you to email a candidate
- **Remove, Pass, Withdraw, Reject**
Selecting one of these options will move the candidate to the relevant folder.

A couple of important points:

If you are using VI as an integration with your ATS, only candidate scoring translates to the ATS.

Any other actions that you take for example, rejecting or withdrawing a candidate whilst in the VI platform, will remain in the VI platform (you would have to reject or withdraw the candidate manually in the ATS too.)

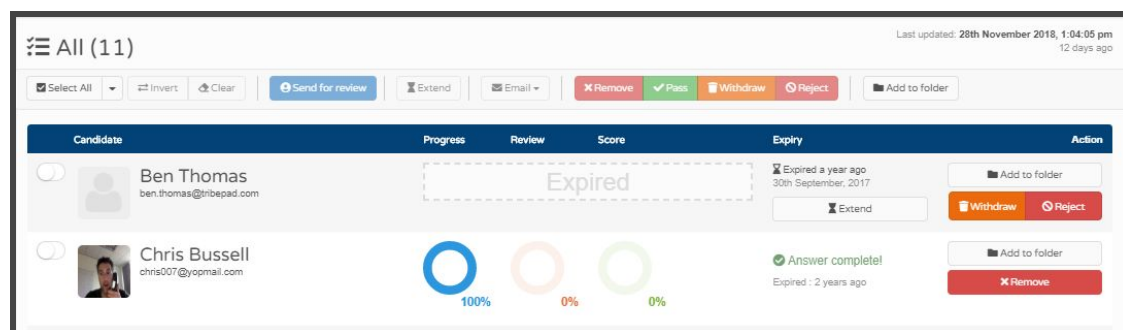
All processing actions need to be carried out in the ATS in order to progress a candidate.

Position - folder navigation

Active

Selecting the 'Active' folder will take you to a list of all candidates that have been invited to that particular interview.

From here you can review the progress of a candidates interview e.g. is it complete or incomplete, has it expired.



Not Started and Started

The progress folders are further broken down so that you can see which candidates haven't yet started their video interview or vice versa.

Review

Candidates are automatically moved into this folder when they submit their interview with at least one answer in it or if the video interview reaches it's expiration time and the candidate has answered one or more of the questions.

Complete

Once a candidate has fully completed their interview and anyone that has been assigned to review it has completed their review, the candidate will automatically appear in this folder.

It is worth noting at this point that if an interview has been set up with the 'auto-reject' feature, their completed video interview will never appear in this folder. It will automatically appear in the 'Rejected' folder (if the candidate has been auto-rejected). Otherwise the candidate can be reviewed as normal.

Rejected and Withdrawn

If you reject or withdraw a candidate, they will appear in one of these folders.

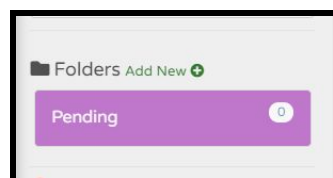
Passed

If you select the '**Pass**' icon - your candidate will be moved to this folder.

Expired

Will show candidate's that did not complete their VI by the expiry date.

To create your own folder you can select the '**Add folder**' icon and follow the steps. Your folder will also appear on the left-hand side of the screen once you have created it.



If you are using the VI platform to send your interviews you can create your own email templates.

Video interview preparation

Before you can create your video interview you will need to think about and prepare the components that you would like to incorporate into your interview.

Media

If you would like to incorporate media into your interview for example, ask questions via video or perhaps provide a welcome message via video. You can do this by selecting the Media option and uploading the files that you will later use when creating the video interview.

Pages

Pages are entirely optional, however, may contain content to help guide the candidate. Pages might contain a welcome message, some guidance or even a video. To create a page template, select the page option from the menu and select **Create Page**. Select a template style, give your page a title (internal purposes only) the heading and page content will appear on the right as you type so that you can see what the template will look like. Select save once complete.

*Candidate instructions on using VI are shown as default at the start of all interviews so you do not need to factor that information into your planning.

Questions

You can create a question in written and or video format, using a video to record the question/s being asked is a great way to create a feeling of a face to face interview.

There isn't a right or wrong number of questions to ask a candidate, only that you will have to set aside the viewing time. If you are using VI as a required part of the application journey, then you may want to consider only a couple of questions with a minimum answer time. If you are using VI later on in the process, candidates are streamlined (therefore a lot less invites) then you could opt for more questions and longer answer times.

You may also consider & apply the following options;

- Scoring criteria; allowing you to measure the candidates videos against set criteria of your choice.
- Recording time limits; usually set to 60 seconds by default.
- Re-record limits; you could allow 1 or multiple re-record attempts before the interview is submitted by the candidate.

Emails

Emails let the candidate know that they have been invited to carry out an interview.

If you are using the ATS to send your video interviews, you can edit the text contained in the emails via the Manage tool.



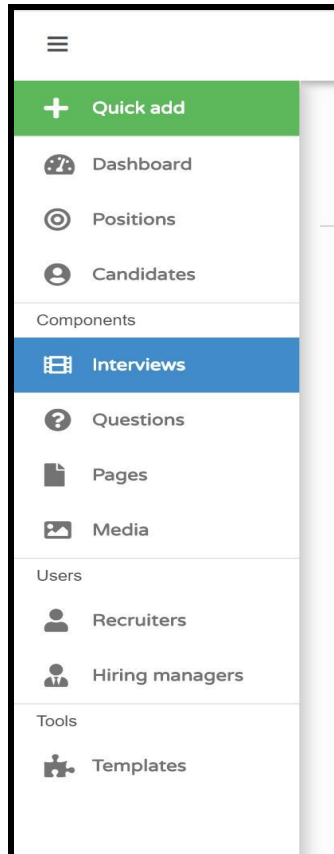
(See our Manage training videos, talk to your ATS Lead within your own organisation or contact your Account Manager at Tribepad for more details if you are unsure what Manage is.). If you are using the VI platform to send your interviews you can create your own email templates.

Creating a video interview - using the Quick Add option

The quick add feature can be used if you want to produce an interview without the requirement to create templates (you can still add pages and media).

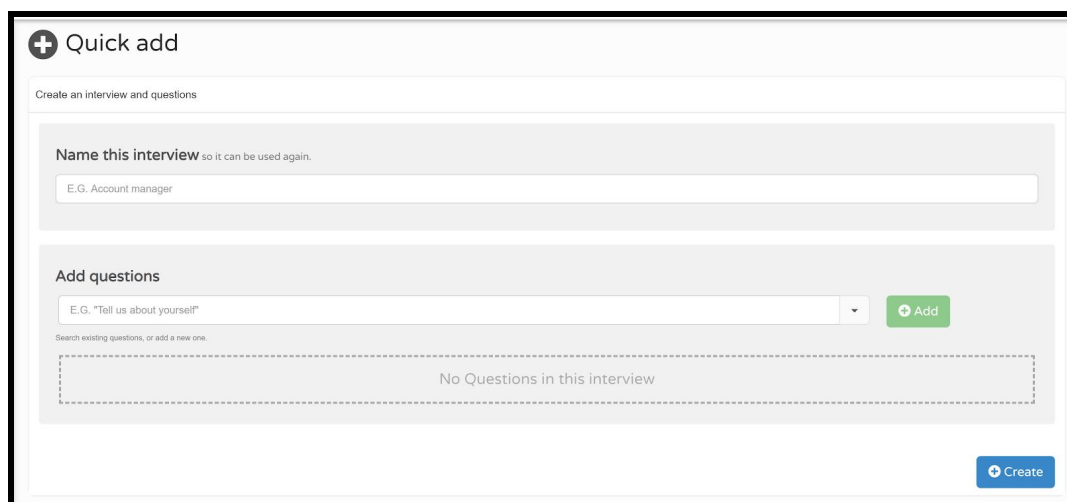
1 - Login to the VI platform.

Once you have logged in you will be presented with a menu down the left-hand side of the page.



2 - Select the green + Quick add button at the top of the menu.

You will be presented with this page.

A screenshot of the 'Quick add' form for creating an interview. The form has a title 'Quick add' with a plus icon. Below the title is a subtitle 'Create an interview and questions'. The form is divided into two main sections. The first section is 'Name this interview' with a subtitle 'so it can be used again.' and a text input field containing 'E.G. Account manager'. The second section is 'Add questions' with a subtitle 'Search existing questions, or add a new one.' and a text input field containing 'E.G. "Tell us about yourself"'. To the right of the input field is a green 'Add' button. Below the input field is a dashed box containing the text 'No Questions in this interview'. At the bottom right of the form is a blue 'Create' button.

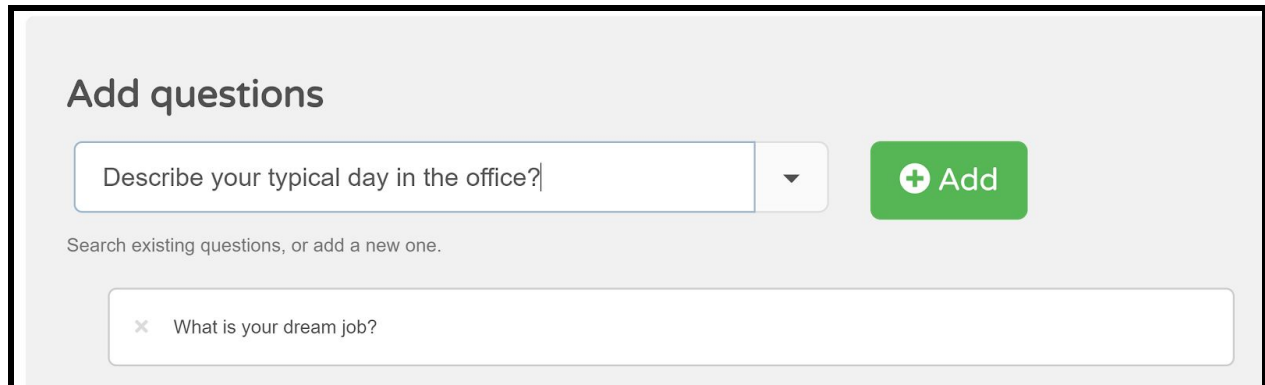
3 - Name this interview

In the white blank field under 'Name this interview' give your interview a name by typing some text, it doesn't have to match the name of the job you are recruiting for especially if it's a standardised interview that you may use across other roles.

4 - Add questions

Start to type a question in the white blank field under 'Add questions', once done select **+ Add** -.

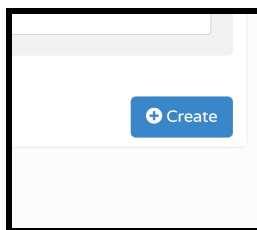
The question will appear below to show you it has been created.



Any questions that are added will always be available for future use in other video interviews, as soon as you start to type in the blank field a list of questions that have been created previously will appear for you to select if you wish.

5 - +Create

Once you are happy with all of your questions select the blue **+ Create** button at the bottom right of your screen.



6 - Interview overview & scoring

You will now be presented with an overview of your questions.

To the left-hand side of the screen you will see a **'Start'** icon and a timeline that flows down showing each of the questions that you have added in order of how they will appear in the interview right up to the **'End'** icon.

See the image below;

Account Manager

Back to interview library

Overview | Save | Save As | Rename

Start

+ Add step

1 Tell me about your typical day?

+ Add step

2 Tell me about a project where you were a critical part of the delivery team?

+ Add step

3 Tell me about a time when you have dealt with a sensitive situation.

+ Add step

End

Overview

Your interview consists of 3 steps, with 3 questions attached to it. We estimate it will take the average candidate 4:36 minutes to complete.

Scoring summary:

This interview does not have any scoring criteria attached to it. Although not required, candidates will not be ranked or reviewed.

7 - Timeline

Within the timeline of questions you have the following options;

1. + Add step

If you select this icon anywhere that it appears on the timeline, you will be able to;

- **Add another question**
Perhaps you want to add an additional question.
- **Add a page**
Perhaps you want to break up your questions with some media you have uploaded.
- **Add a group**
Create a set of different questions for example 5 in total, but only 3 of the 5 are chosen at random for the candidate to answer. You can add scoring criteria to each question, but keep the maximum score the same. The score will be averaged once all reviews have been completed.

2. Add scoring criteria

With your cursor, click on an individual question within the timeline and an option that looks like the below image will appear on the right-hand side of the screen.

Edit step 2

1 Tell me about a project where you were a critical part of the delivery team?

Delete

★ Scoring criteria

Add new criteria

Name Did the candidate provide a good example?

Rating 10

Add

This question does not currently have any scoring criteria. Recruiters and hiring managers will not be able to score candidate answers for this question in this interview.

Update

- **Name**

In this blank field you need to think about what you want the reviewer of the candidates video to be looking for when they are watching the video - enter that criteria in this field.

- **Rating**

Enter a maximum score in this field and select **Add** and then **Update**.

Your scoring criteria will be added.

Adding scoring criteria to a question allows a reviewer (recruiter/hiring manager) to assess candidates by adding a score to the video once it's been reviewed. The user will need to be assigned to the video in order to score and comment on it.

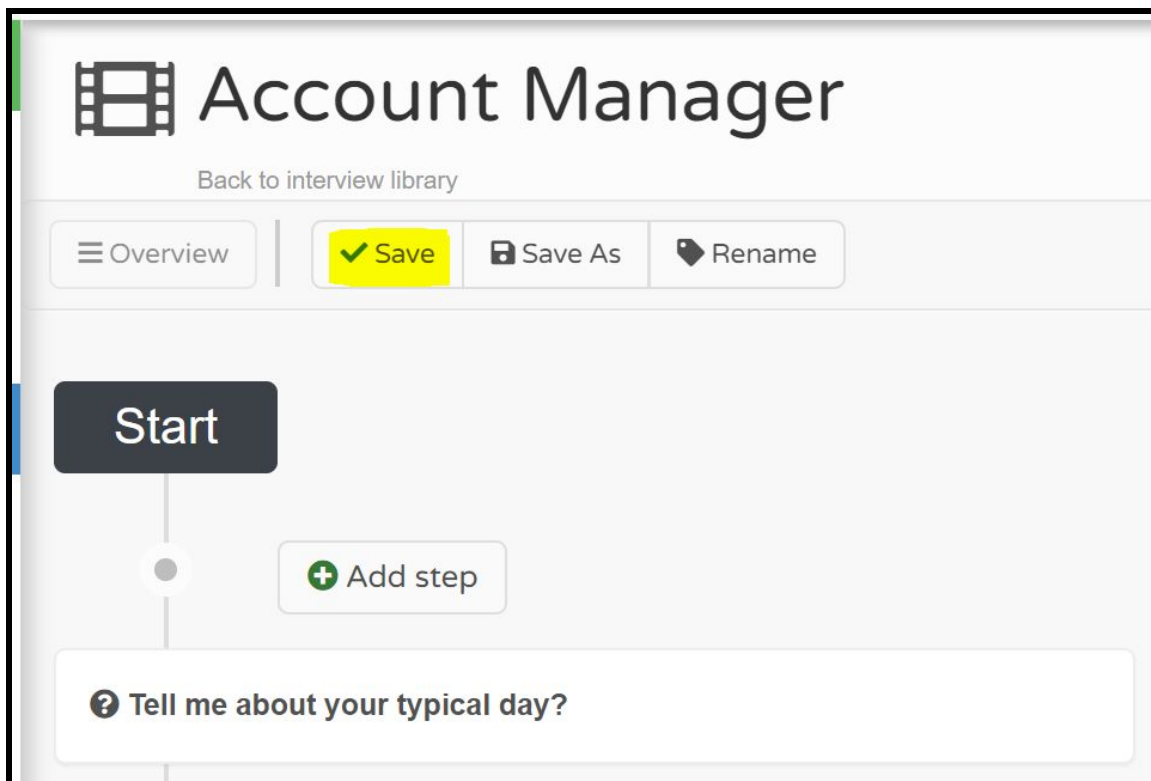
- The question creator adds the maximum level of scoring to each question.
- The reviewer adds their score once they have watched the video.
- You may only add scoring as a reviewer via the video interview platform, the scoring does, however, translate to the ATS.

3. Delete the question

Select the red **Delete** icon to remove the question from the interview you will be prompted to confirm deletion, select cancel or delete to confirm.

7 - Save

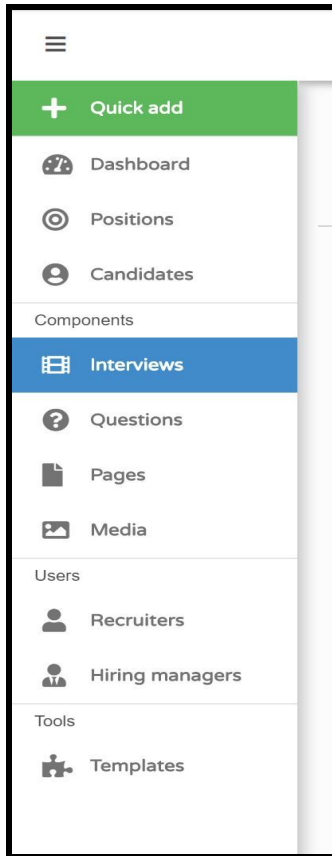
Select **Save** to finish the interview.



A green tick will appear to show the interview has been saved.

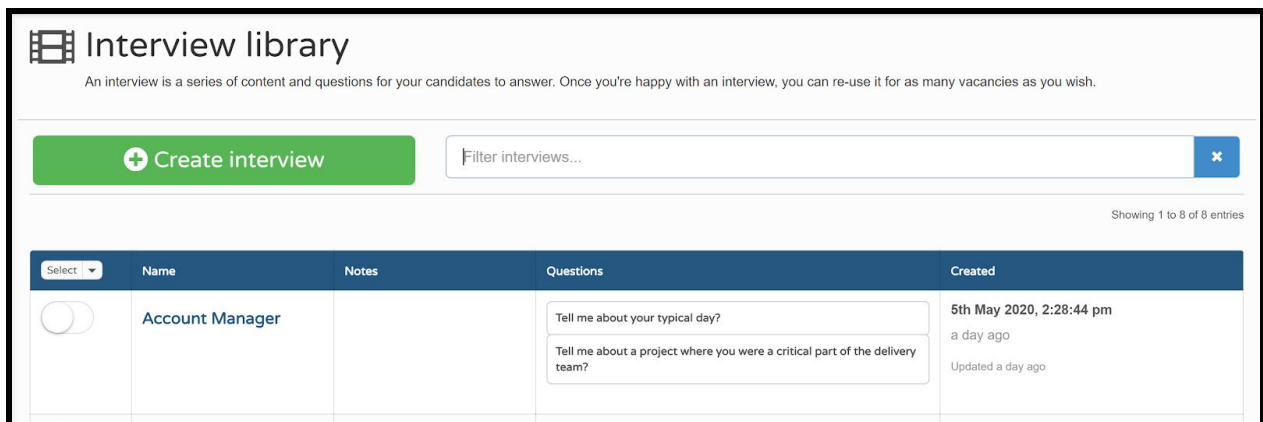
8 - Interview library

From the menu on the left-hand side of your screen, select **'Interview library'**.



9 - Interview library

On the right-hand side of the page you will be able to view your newly created interview.



Quick Add - next steps

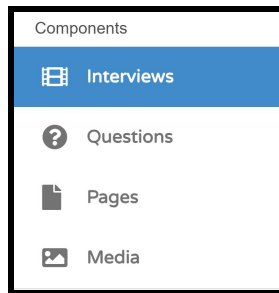
To see how to invite candidates to an interview when using VI as a stand-alone platform go to pages **24 - 29**.

Creating a video interview - using default templates

The following guidelines will support you in creating a video interview using templates.

1 - Login to the VI Platform

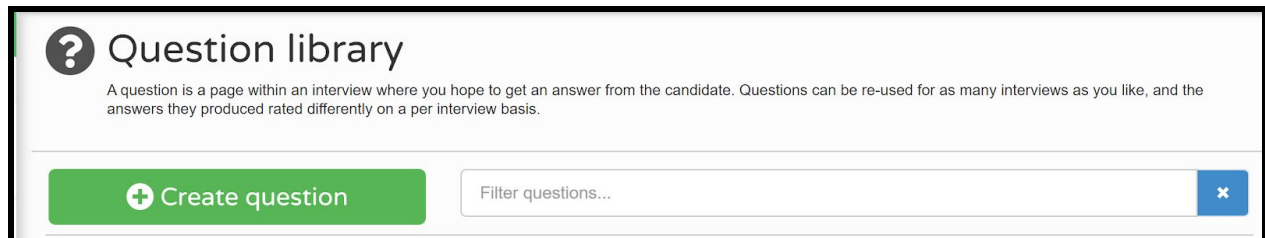
From the menu on the left hand side of your screen, navigate to the heading **Components**.



2 - Questions

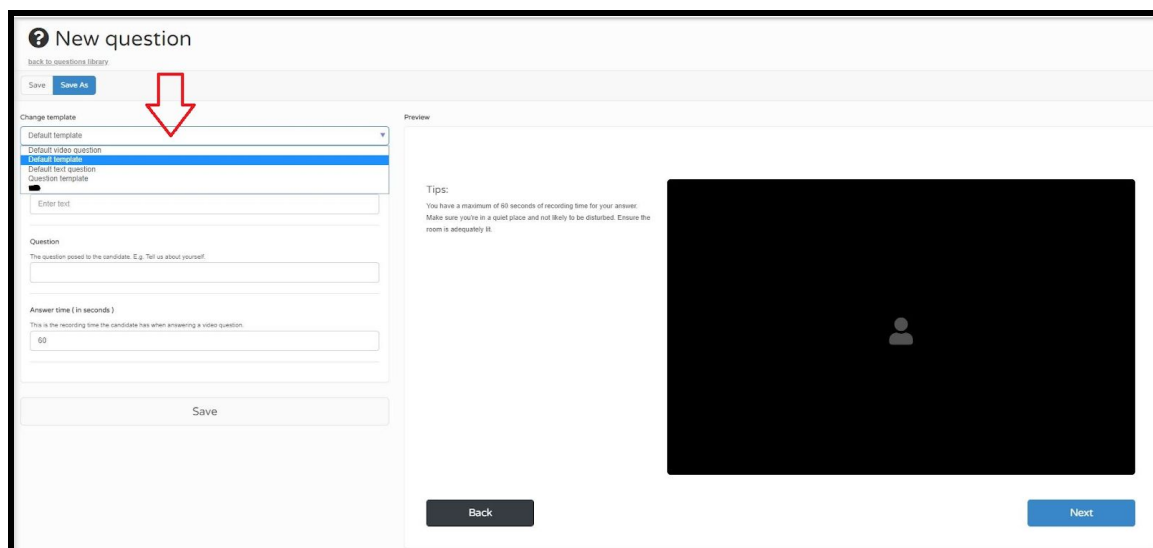
Select questions from the components menu and you will be presented with the Question Library.

Select **+ Create question**



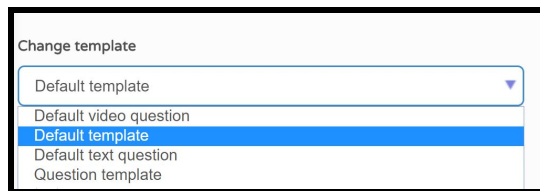
3 - ? New Question

You will be presented with a new screen called ? New Question.



On the left-hand side of the screen there is a drop-down menu underneath, **Change template**.

The VI platform incorporates some templates that have already been created for you by default so that you can use them to add your content to.

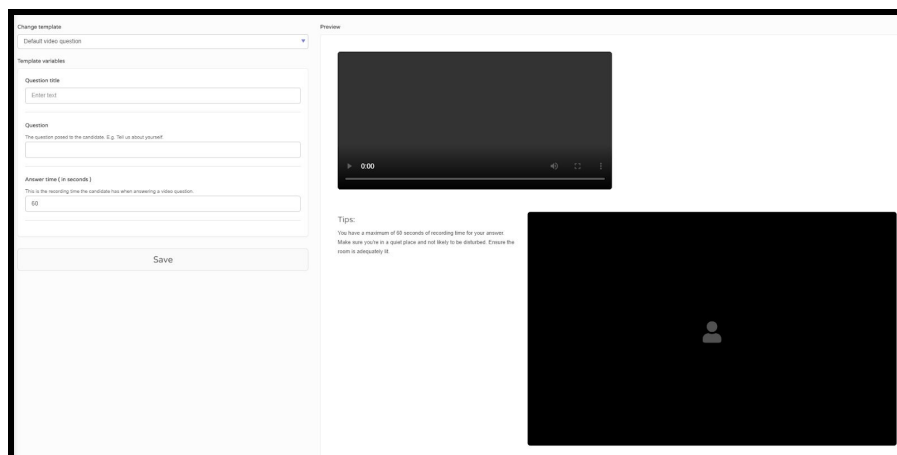


If you select the **Default video question** the image on the right-hand side of the screen will change to show you what that template will look like;

The smaller image represents the interviewers video (a question).

The larger image will be where the candidate has responded via video recording.

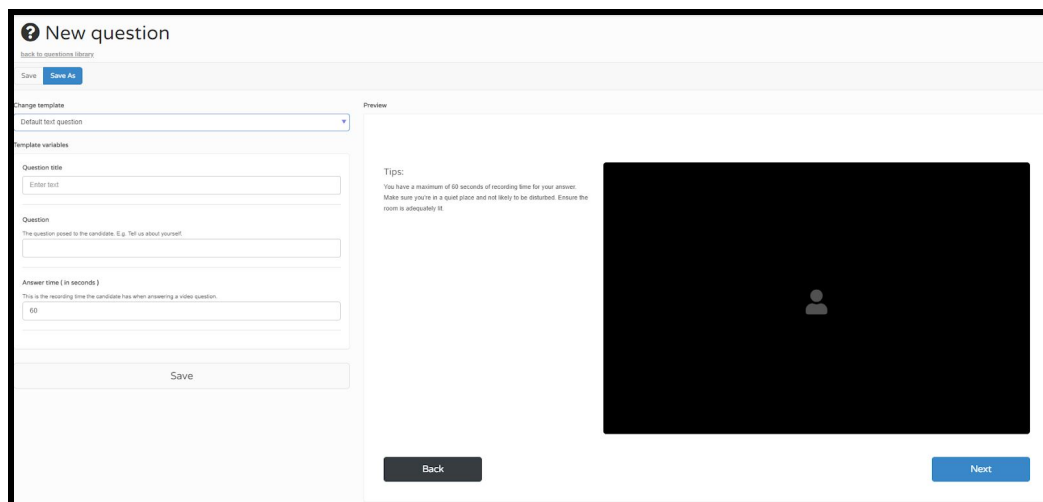
The tips provide some guidance for the candidate.



If you select the Text template, the image on the right will again change to show you what that template will look like;

The larger image will be where the candidate has responded via video recording.

The tips provide some guidance for the candidate.



4 - Creating a text question

Select the default text question from the drop-down menu.

Enter a **Question title** - this is for internal purposes only, it won't be presented to the candidate but it will be visible when you go to the question library. Enter your **Question** in the blank question field. Enter the maximum number of seconds that you want to allow the candidate to respond and select **Save**.

The screenshot shows a form titled 'Change template'. At the top, there is a dropdown menu labeled 'Default text question'. Below this is a section titled 'Template variables'. Inside this section, there are three fields: 'Question title' with the value 'Account Manager - Question 1', 'Question' with the value 'What is the most favorite part of your job?', and 'Answer time (in seconds)' with the value '60'. At the bottom of the form is a 'Save' button.

A pop-up will appear, select **Save As**.

The screenshot shows a 'Save As' pop-up dialog. It has a 'Question title' field with the value 'Account Manager - Question 1' and a 'Notes' field with the value 'Use this question as question 1 for all Account Manager roles that you recruit for.'. At the bottom right of the dialog are 'Cancel' and 'Save As' buttons.

At this point you review your saved question from the Question library.

The screenshot shows the 'Question library' interface. It has a header with a question mark icon and the title 'Question library'. Below the header is a description: 'A question is a page within an interview where you hope to get an answer from the candidate. Questions can be re-used for as many interviews as you like, and the answers they produced rated differently on a per interview basis.' Below the description is a green button labeled '+ Create question' and a search bar labeled 'Filter questions...'. Below the search bar is a table with the following columns: 'Select', 'Preview', 'Name', 'Notes', and 'Created'. The table contains one row with the following data: 'Select' (a radio button), 'Preview' (a small thumbnail image), 'Name' (Account Manager - Question 1), 'Notes' (Use this question as question 1 for all Account Manager roles that you recruit for.), and 'Created' (7th May 2020, 11:12:23 am in 4 minutes Updated in 4 minutes).

| Select | Preview | Name | Notes | Created |
|-----------------------|---------|------------------------------|---|---|
| <input type="radio"/> | | Account Manager - Question 1 | Use this question as question 1 for all Account Manager roles that you recruit for. | 7th May 2020, 11:12:23 am in 4 minutes Updated in 4 minutes |

Select the question title and you will be presented with the template question that you have created - in the image below you can see the question now appears at the top.

What is the most favorite part of your job?

Tips:

You have a maximum of 60 seconds of recording time for your answer. Make sure you're in a quiet place and not likely to be disturbed. Ensure the room is adequately lit.

5 - Creating a video question

Simply follow the same process as above, but change the template selection - follow the steps on the left-hand side of the screen as before however you will have the option to choose your video interview.

The video will need to be ready to select from the media library.

Answer time (in seconds)

This is the recording time the candidate has when answering a video question.

60

Video

Choose video

Video Description

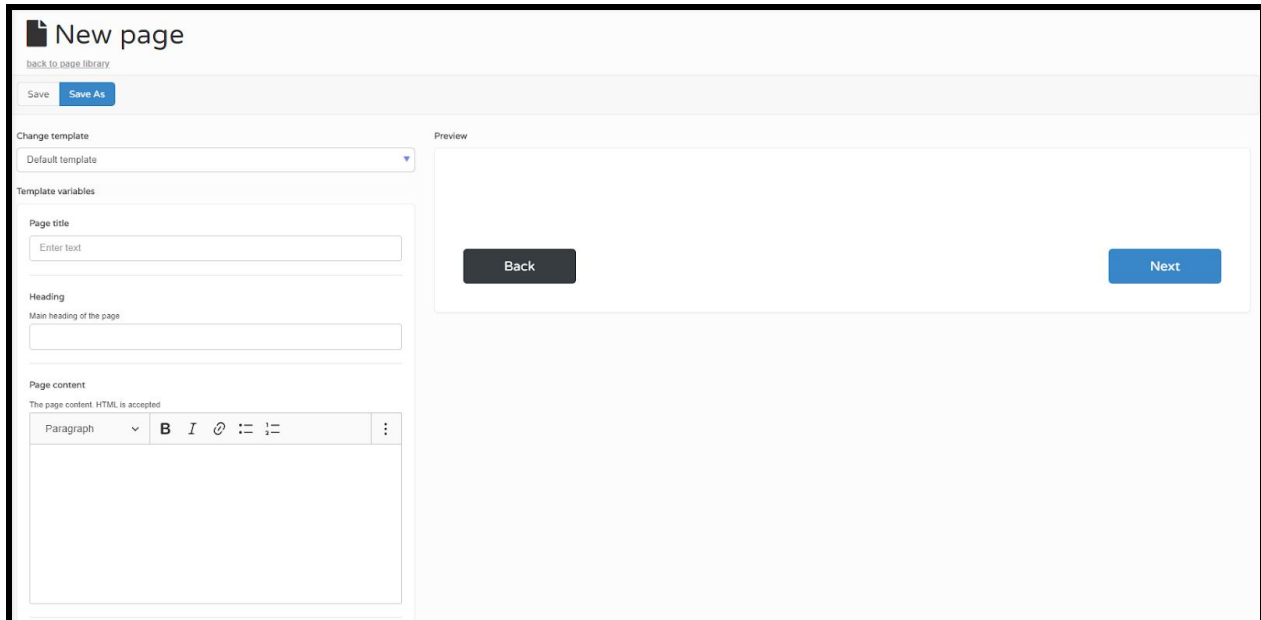
Video sub text and description. Consider accessibility and provide details of the videos content

6 - Creating pages

Select **Pages** from the components menu and select the green button + **Create page**.

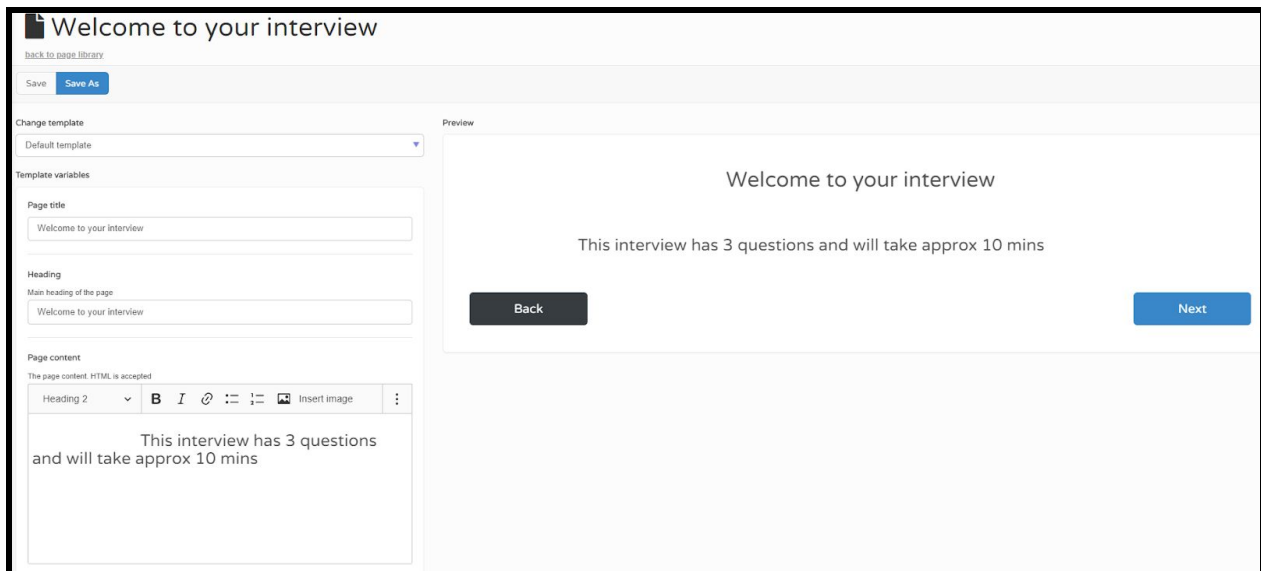
You will be presented with a screen like the image below - this is your template and you can choose from the default template options on the left-hand side of the screen and then complete the required information below your template selection.

Remember pages need to be engaging, you can provide a pre-recorded video introduction or a welcome page.



The screenshot shows the 'New page' interface. On the left, there are fields for 'Page title' (with a placeholder 'Enter text'), 'Heading' (with a placeholder 'Main heading of the page'), and 'Page content' (with a placeholder 'The page content. HTML is accepted' and a rich text editor toolbar). On the right, there is a 'Preview' section showing a dark 'Back' button and a blue 'Next' button.

An example of a page containing some text.



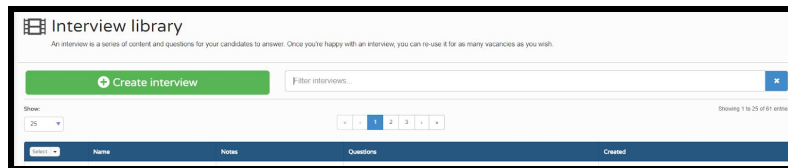
The screenshot shows a completed page titled 'Welcome to your interview'. The 'Page title' field contains 'Welcome to your interview', and the 'Heading' field contains 'Welcome to your interview'. The 'Page content' field contains the text 'This interview has 3 questions and will take approx 10 mins'. The 'Preview' section shows the final page layout with the title, heading, and content, along with the 'Back' and 'Next' buttons.

When you have completed the details, select **Save**.

Your newly created page/s will appear in the Page library.

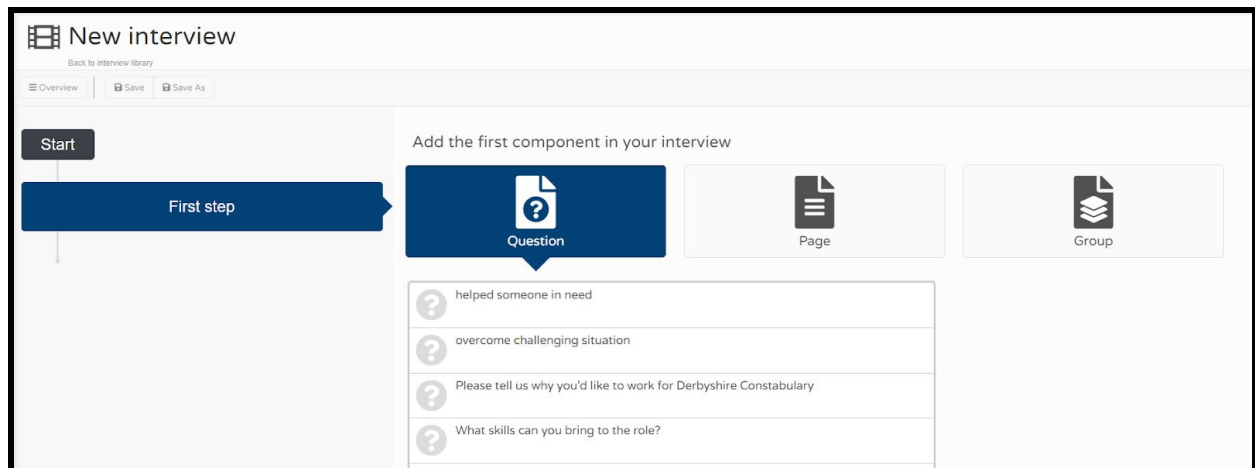
7 - Creating an interview

Select **Interviews** from the components menu and you will be presented with the Interview Library.



8 - + Create interview

Select the **+ Create interview** button and you will be presented with a new screen.

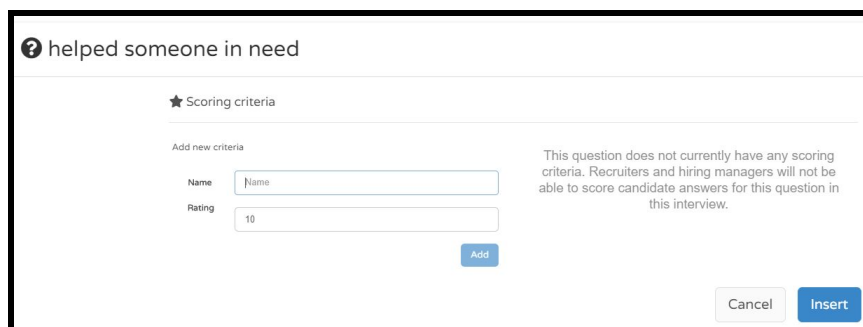


9 - First step

Select the questions that you want to include in your interview from the list provided.

For each question that you select you will be prompted to add scoring criteria, you don't have to but you can if you want scoring to be applied to the reviewing process.

After adding scoring criteria or if you want to skip the scoring criteria, select **Insert**.

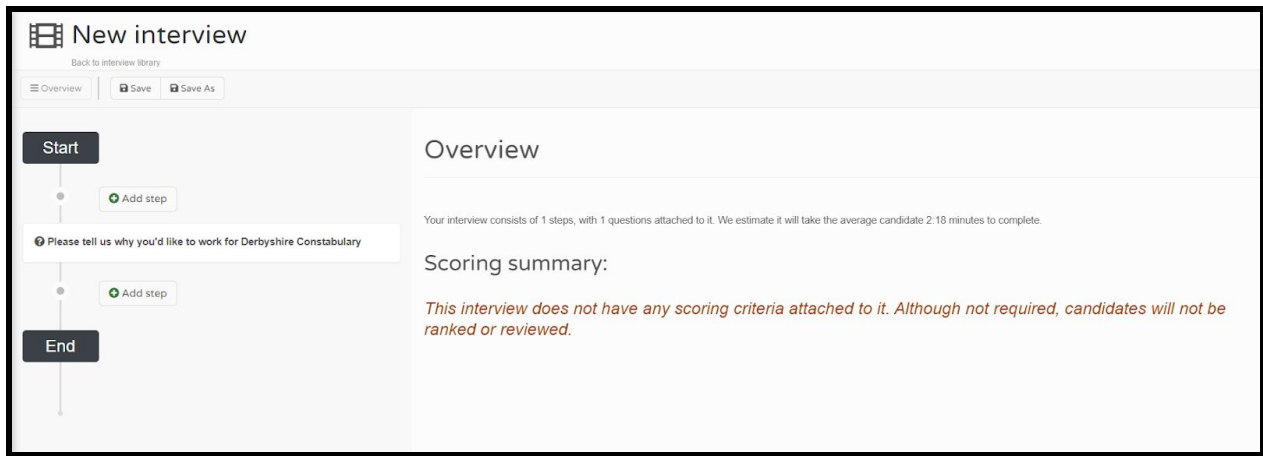


Once you have selected **Insert** you will see a timeline flowing downwards on the left-hand side of your screen.

The timeline represents each stage (question/page) of your interview from start to finish.

If you added scoring criteria, it would appear on the right hand-side of the screen.

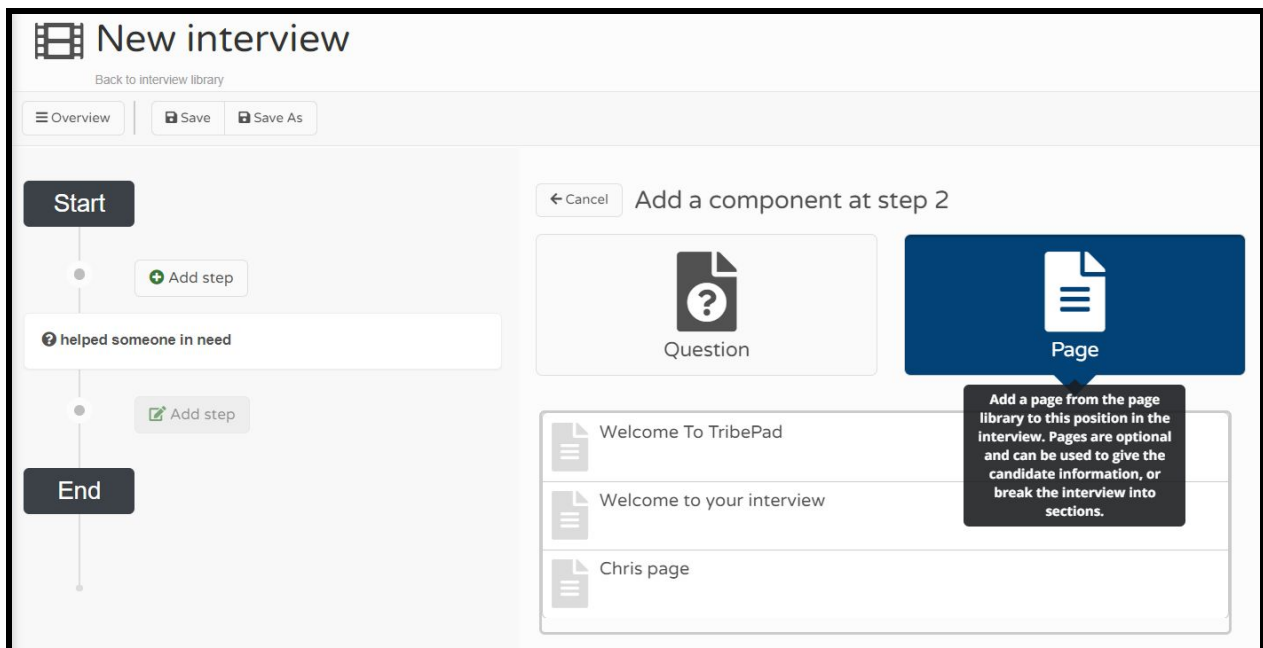
See image below.



After you have added your first question, select **+ Add step** from the timeline, this will allow you to add another question or perhaps you want to add a page that you have created.

10 - Add a page to your timeline

Select the **Page** button and any pages that have been created will appear for you to select and insert.



11 - Groups

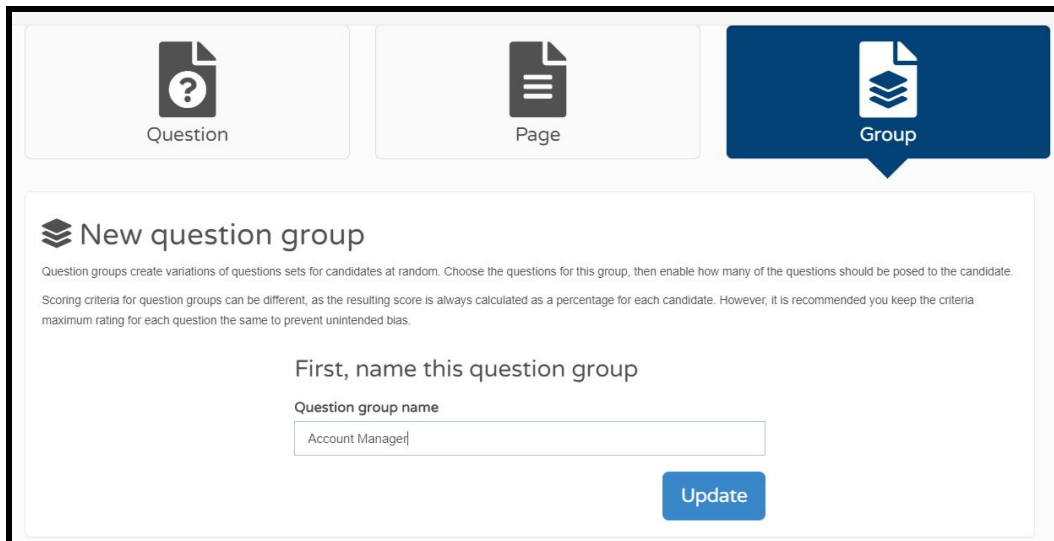
Create a set of different questions for example 5 in total, but only 3 of the 5 are chosen at random for the candidate to answer.

You can add scoring criteria to each question, but keep the maximum score the same.
The score will be averaged once all reviews have been completed

Your interview may contain one of two questions and then the 3rd question is selected from the group you have created at random when the candidate completes the interview.

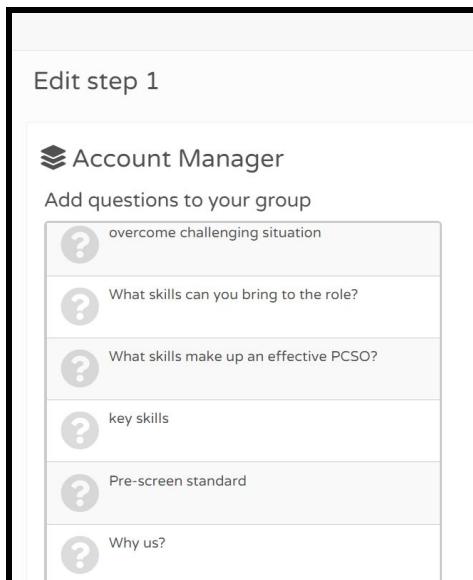
See image below.

Enter a name for the group of questions and select **Update**.



Select a set of questions from the list of questions that are presented to you.

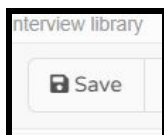
Remember that the group of questions need to be similar to avoid any bias in the recruitment process (e.g. one candidate's question is more difficult than another candidate's question).



Once you have made your selection, select **Update**, you will again be able to add scoring criteria to each of the questions in the group and the group will also appear in your timeline.

It's important that you add the steps in the correct sequence, if you want for example a Welcome Video to be presented as the first step of the interview, ensure that a Page is the first thing you add to your timeline.

Select **Save** once your interview is complete.



The interview will now appear in the **Interview library**.

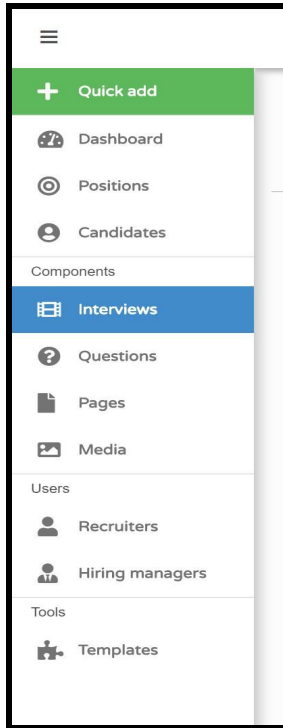
Inviting candidates

Sending invitations via the stand-alone platform

If you are using VI as a stand alone platform you will need to use the following steps to invite candidates to carry out your video interview.

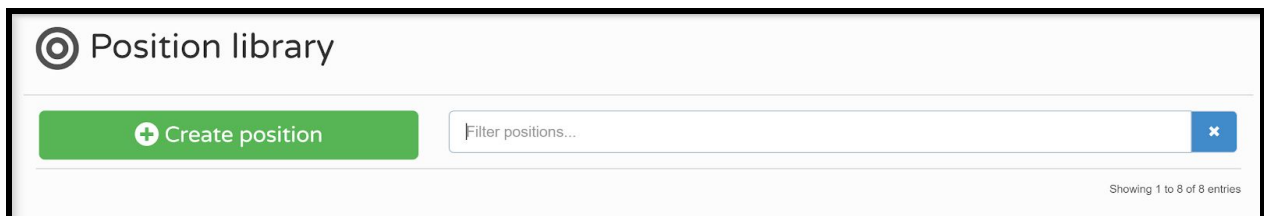
1 - Create a Position

From the menu on the left-hand side of the screen select **Positions**.



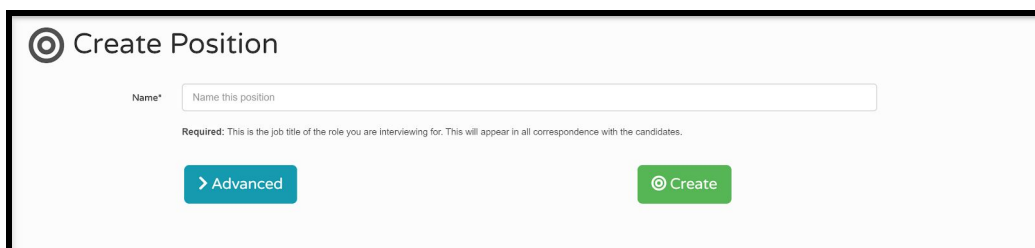
2 - + Create Position

With your cursor select the green **+ Create Position** icon at the top left of your screen.



3 - Name

Enter the name of your position in the white blank field and select the green **Create** icon once you have finished.



4 - Position created

At this point you will be presented with a new screen prompting you to assign your interview.

Account Manager

Add candidate

Control Panel

No interview selected
Before you continue, please select an interview for this position

Last updated: 05h May 2020, 3:21:07 pm
in 4 minutes

Edit position

Job details

Name and description

Position Name
Account Manager

Notes (Can be seen by Hiring managers)

Description

Paragraph

Video interview

Attach an interview Select an interview for this position

Filter

| | |
|--------------------------|---|
| Account Manager | 1 |
| Account Manager | 6 |
| Contact Centre | 4 |
| Customer Service Advisor | 2 |
| HR Coordinator | 4 |
| HR Manager | 1 |
| Security Guard | 2 |
| Training | 3 |

Update

5 - ? Video interview

Select the relevant video interview from the right-hand side of the screen.

Video interview

Attach an interview Select an interview for this position

Filter

| | |
|--------------------------|---|
| Account Manager | 1 |
| Account Manager | 6 |
| Contact Centre | 4 |
| Customer Service Advisor | 2 |
| HR Coordinator | 4 |
| HR Manager | 1 |
| Security Guard | 2 |
| Training | 3 |

Update

6 - Update

Once you have selected the interview, select **Update** and the following information will appear below;

The screenshot shows a settings panel with four sections, each with a green checkmark icon indicating it is active:

- Localisation**: Includes a 'Response language' dropdown set to 'Native' and a toggle for 'Select a response language per question' which is currently off.
- Record attempt limit (off)**: Includes an 'Interview attempt default' dropdown set to 'Off' and a toggle for 'Edit individual question limits' which is currently off.
- Auto Reject (off)**: Includes a description 'Automatically reject candidates if they are given the thumbs down.' and a toggle for 'Enable auto reject' which is currently off.
- Auto reviewer assignment**: Includes a description 'Choose multiple users to review candidates on completion automatically.' and a toggle for 'Enable auto reviewer assignment' which is currently off. A warning message states: 'Candidates will have to be manually assigned to reviewers.'

For each of the above options you can select the relevant toggle so that it shows as green, this indicates that you are making a change, the text against each option advises you what actions you can take.

7 - Job details

On the left of the page you have the option to add Job Details - these do not translate to the ATS, they are purely for internal purposes and will only be shown in the VI platform.

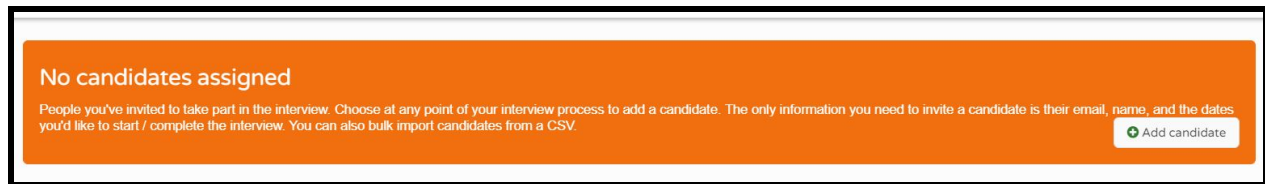
The screenshot shows the 'Edit position' form in the 'Account Manager' interface. The left sidebar contains 'Add candidate' and 'Control Panel' buttons. The main form has the following sections:

- Job details**: A green checkmark icon.
- Name and description**: Includes a 'Position Name' field with the value 'Account Manager' and a 'Notes (Can be seen by HRG managers)' text area.
- Description**: Includes a rich text editor with a toolbar containing bold, italic, link, unlink, insert image, and other formatting options.
- Expiry**: Includes a toggle for 'Enable "evergreen"' (currently off) and an 'Expiry date' field with the value '05/06/2020'.
- Responsibilities**: Includes another rich text editor with a similar toolbar.

8 - Invite candidates

You can invite candidates via email to carry out your interview from the Positions screen.

At the top of the screen there is an orange banner - at the bottom right of the banner is a button **+ Add candidate**, select it.



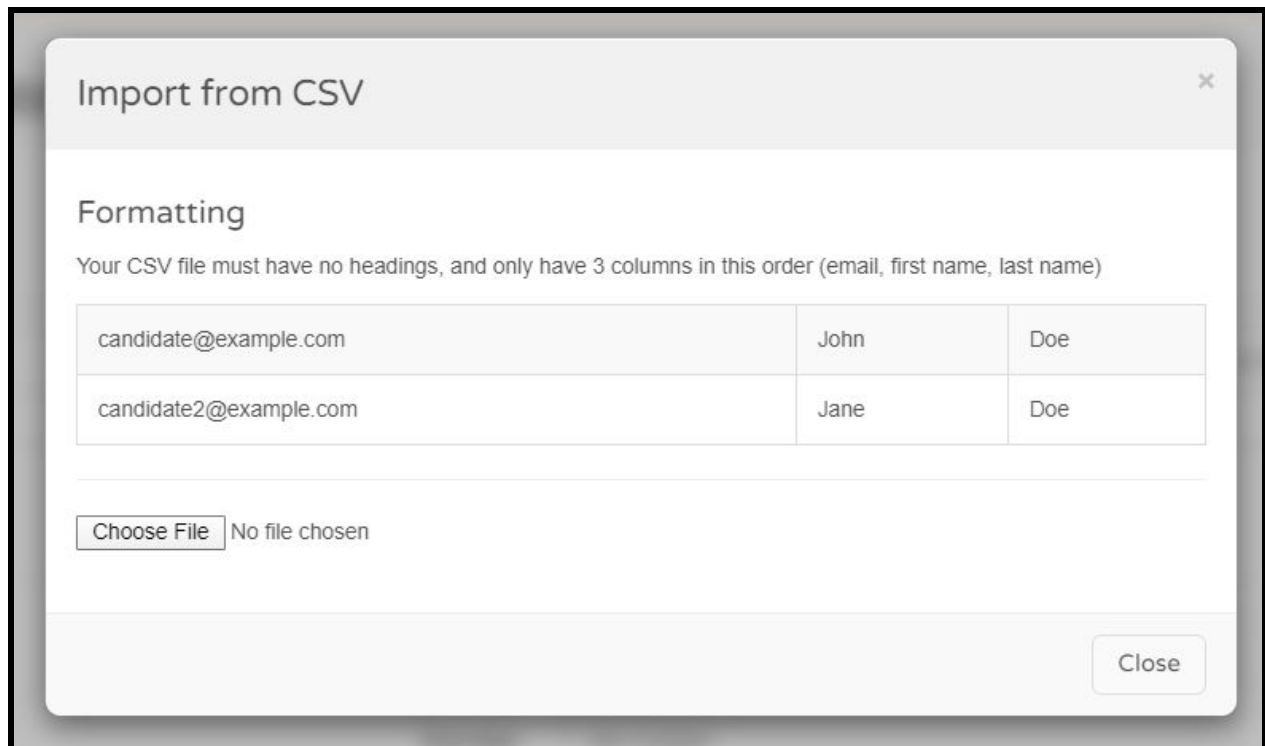
9 - Invite screen

You will be presented with a new screen where you have 2 options;

1. Import a CSV file of candidates.
2. Add and invite candidates individually.

Import

Select the import button and you will be presented with a pop-up, the pop-up shows you exactly how your **CSV** file must look in terms of format in order for it to be imported successfully.



If you choose the import option (because you want to send a bulk invitation), prepare your CSV file ensuring the format is correct and then revert to selecting the **Import** button and **Choose File**, you will then need to select your CSV file from your own computer (wherever you have saved it).

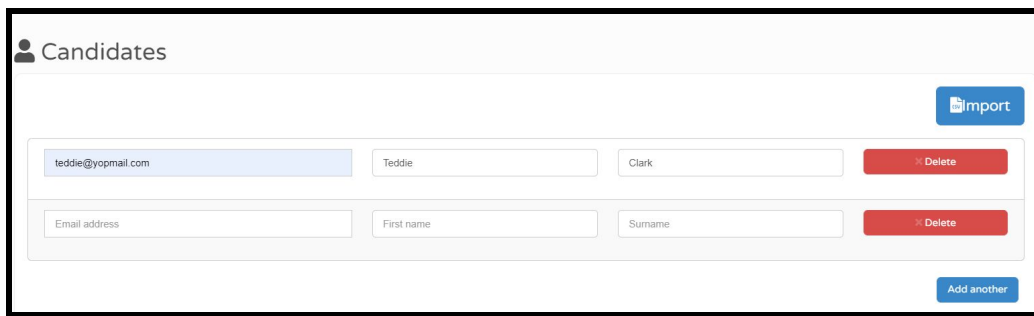
10 - Add candidates - individually

If you want to add candidates individually simply enter the email address, first and surname.

You can still add more than 1 candidate on an individual basis, just keep selecting the **Add another** button.

To remove a candidate, select the **Delete** button.

See image below.



Candidates

Import

| | | | |
|--------------------|------------|---------|--------|
| teddie@yopmail.com | Teddie | Clark | Delete |
| Email address | First name | Surname | Delete |

Add another

11 - Interview open and expiry dates

Next you need to enter the interview open and expiry dates, think about how long you want to allow your candidate to complete the interview.

If you set the end date as the 30th, the video interview will expire at 23:59:59 on the 30th.

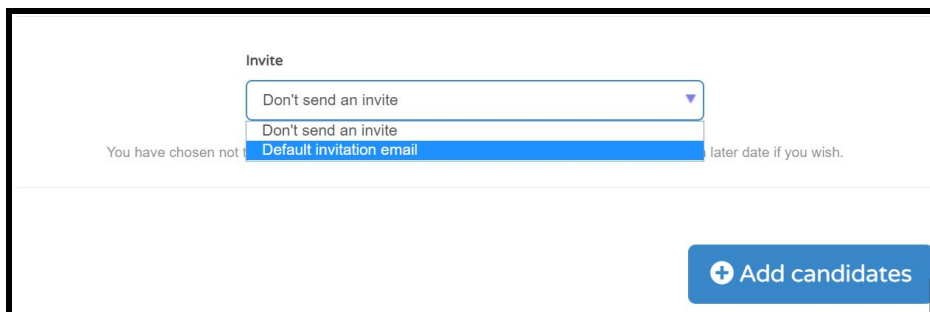


Start date: 05/06/2020

End date: 05/13/2020

12 - Email

The final step is to send an invitation via email so the candidate is notified, select the drop down arrow and select **Default invitation email**.



Invite

Don't send an invite

Don't send an invite

Default invitation email

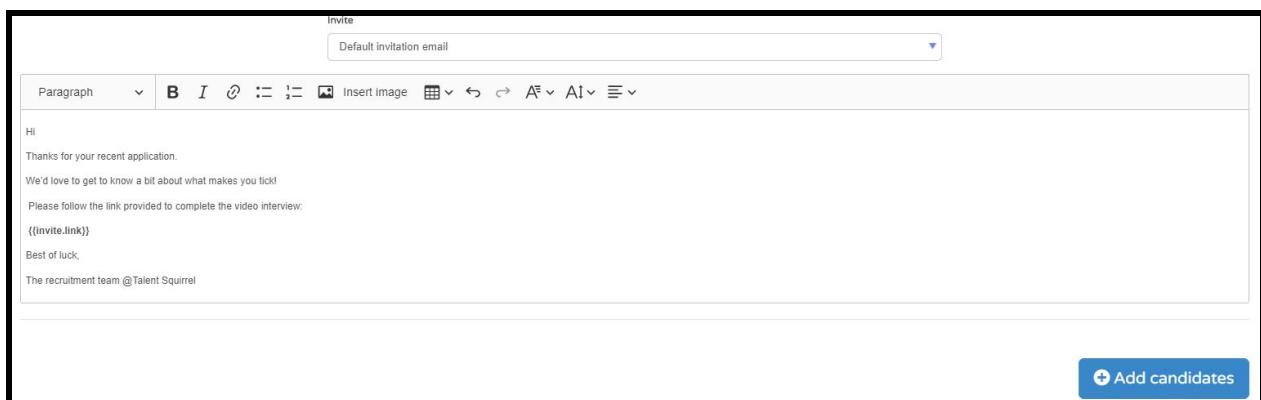
You have chosen not to send an invite. You can select a later date if you wish.

Add candidates

13 - Email invitation

You will be presented with a pop up which you can manually format to your own communication style so that it represents your organisation.

Please ensure that the **link** remains within the content as the candidate will select this to carry out your interview.



Invite

Default invitation email

Paragraph

B I Insert image

Hi

Thanks for your recent application.

We'd love to get to know a bit about what makes you tick!

Please follow the link provided to complete the video interview:

{{invite.link}}

Best of luck,

The recruitment team @Talent Squirrel

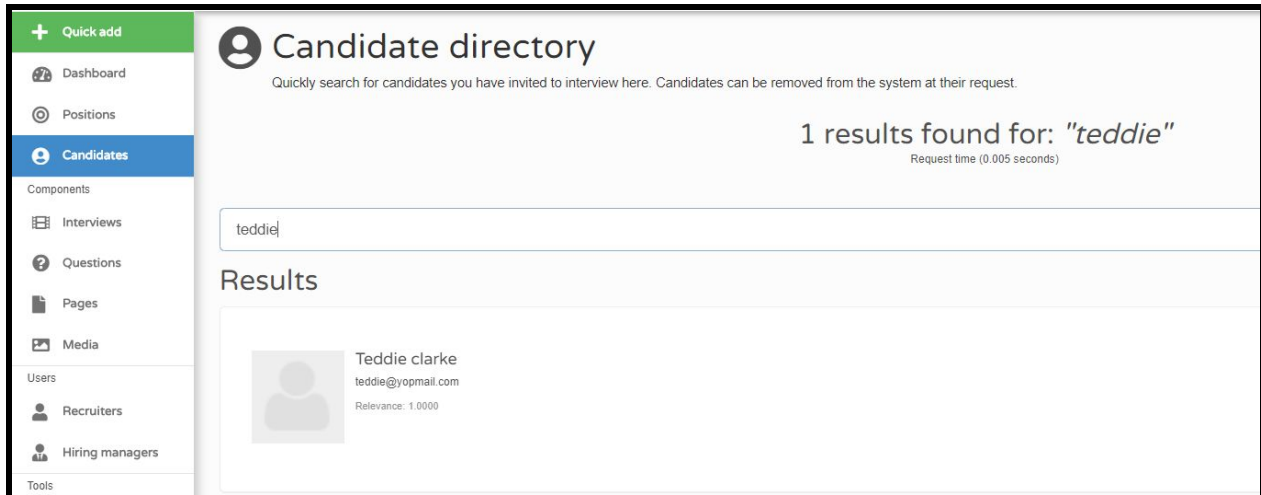
Add candidates

14 - + Add Candidates

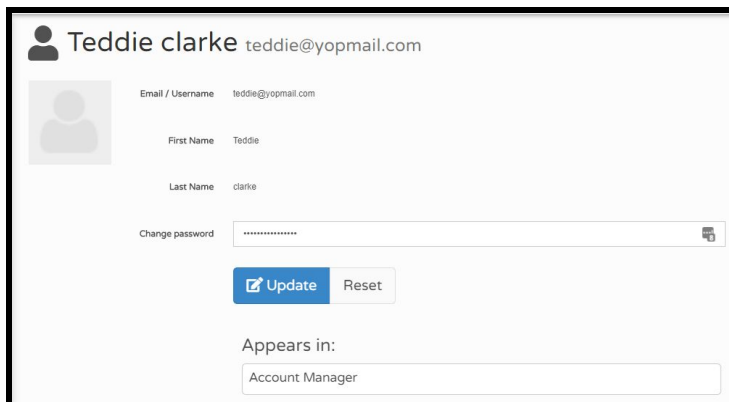
Once you are happy with the email content, select + Add candidates.

A green pop-up will appear in the bottom right of your screen letting you know your submission has been successful.

Any candidates that you add directly to the VI platform will appear in the candidate menu if you search by name.



You can select the candidate and you will navigate to a small profile that has been created within the VI platform.



Inviting candidates

Sending invitations via the ATS

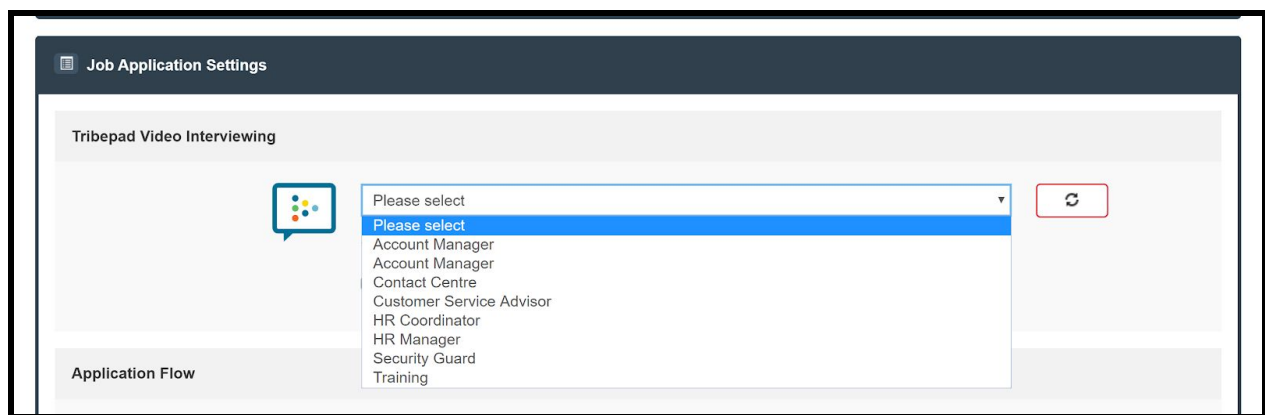
Once your video interview has been created you need to assign the interview to the relevant job within the ATS.

1- Assigning a video to a job

On the first page of the job creation process scroll down to **Job Application Settings** and **Tribepad Video Interviewing**.

From the drop-down menu select your video interview. At this point you can continue with the job creation process and publish your job.

You can also assign video interviews to the candidate's application journey, if you would like that feature enabled, please speak to your Account Manager at Tribepad.



2 - Sending invitations

Once you are ready to invite candidates to your interview, select the relevant job from your **Job List**. and navigate to the candidate view, most likely those candidates in the Shortlist stage.

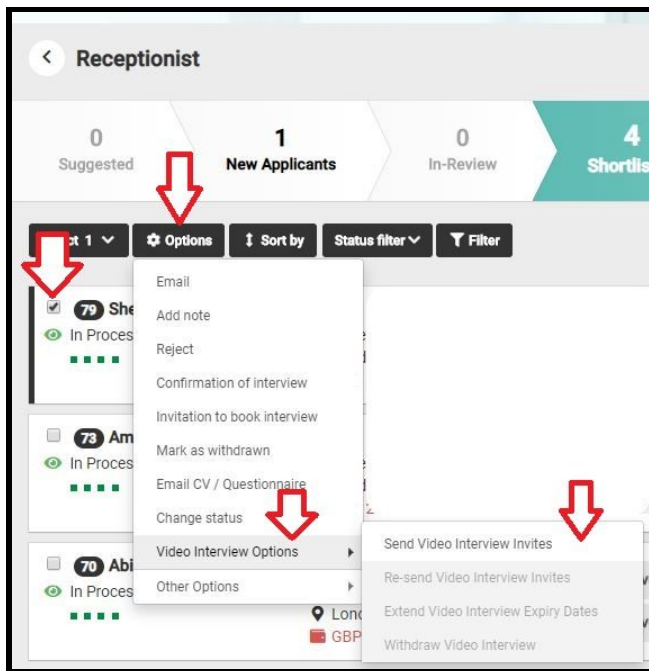
Select the check-box next to the candidate/s that you would like to invite and then select the cog menu that has now become available.

Scroll down the list of options to **Video Interview Options**, move across to the right to expand the menu and you will see the option to **Send Video Interview Invites**.

The other options will be greyed out simply because this is your first attempt at sending the relevant candidate an invitation, once you have sent one, you will have options to;

- Resend the invite.
- Extend the expiry date.
- Withdraw the interview.

See image below.



3 - Email

Once you have made your selection you will be presented with a pop-up invitation.

Send email to

1 selected candidate - Send Video Interview Invites

From:

Super User (communitymanager@tribepad.com)

Email subject:

Invite to Video Interview

Interview dates

07 May 2020

14 May 2020

☒ Move candidate to interview stage

Email content:

B *I* Ix

Hi,

You are invited to a Position video interview for the job { \$JOB_TITLE } (reference: { \$JOB_REFERENCE }).

Follow the link to the interview:

{ \$VI_INTERVIEW_URL }

Good luck!

Attachments:

Upload files

Send

Cancel

The start and expiry dates will be populated by default, you can edit the dates if you would like to.

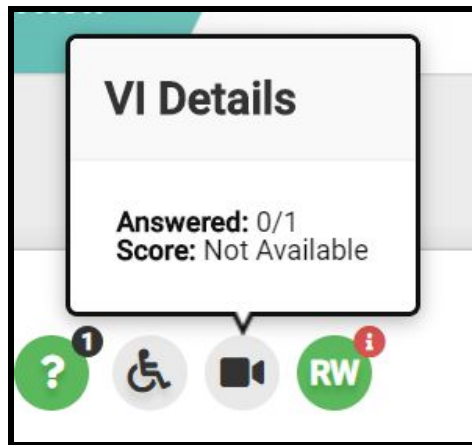
You can also edit the main content however, ideally, the email will have already been formatted within the Manage platform in advance. The Manage platform holds all of the emails driven from the ATS which can be modified by our customers.

It's really important that the Interview URL remains in the content of the email.

If you would like to attach a document, select **Upload files**, perhaps you would like to add some additional guidance for example.

Once you are happy with the invitation you can select **Send**.

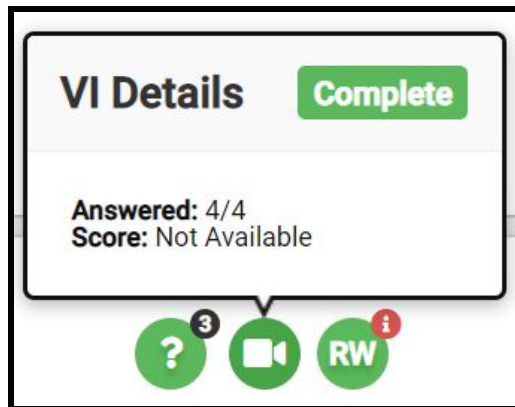
As soon as the interview has been sent an icon will appear against the candidate/s name;



Hover over the icon to view some information about the interview.

The icon will change colour depending on the interview status.

You will also be able to view the status of any scoring criteria.



There is a feature that allows you to view a video interview without needing to navigate to the VI Platform. It would appear when you hover over the VI icon, you select a link and the video appears in a pop-up on screen. If you are interested in this feature, please speak to your Account Manager at Tribepad.

Note:

Once you have sent your invitation, the following options also become available from the same menu;

1. **Resend VI interview invites**
2. **Extend VI expiry dates**
3. **Withdraw invite**

Personality profiling

The human personality isn't something that is very simple to describe as we are all individuals with different traits.

Personality theories or modelling provides a way of classifying an individual and one of the most famous theories is the Five-Factor model (the Big Five). This model is made up of 5 factors which all individuals have shown to present.

There are multiple words (traits) that are aligned to each factor as they tend to occur together, so it is the language/words that are expressed by an individual that determines their traits and to what degree, for example, how conscientious they are.

Here are the 5 factors;

1. Openness
2. Conscientiousness
3. Extraversion
4. Agreeableness
5. Emotional range

Guidance on each factor:

Openness to experience: The openness to experience* dimension of personality is characterised by a willingness to try new activities. People with higher levels of openness are amenable to unconventional ideas and beliefs, including those which challenge their existing assumptions.

Conscientiousness: People who are *conscientious* are more aware of their actions and the consequences of their behaviour than people who are unconscientious. They feel a sense of responsibility towards others and are generally careful to carry out the duties assigned to them.

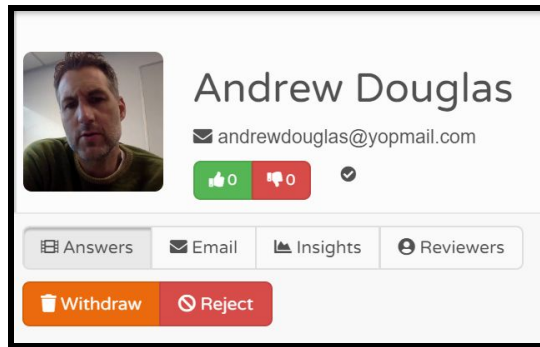
Extraversion: Extraversion is characterised by outgoing, socially confident behaviour. Extraverts are sociable, talkative and often forward in social situations. They enjoy being the center of a group and will often seek the attention of others.

Agreeableness: Individuals who score highly on agreeableness measures are friendly and co-operative. Often considered more likeable by their peers and colleagues, agreeable people are trusting of others and are more altruistic, willing to help others during times of need.

Neuroticism (Agreeableness): This personality dimension is measured on a continuum ranging from emotional stability to emotional instability, or *neuroticism*. People with high neuroticism scores are often persistent worriers. They are more fearful and often feel anxious, over-thinking their problems and exaggerating their significance. Rather than seeing the positive in a situation, they may dwell on its negative aspects. think that last one should be labelled neuroticism instead of Emotional range in the graphs

When a candidate carries out a video interview, the words that they use are analysed via transcripts, the analysis looks for traits associated with each of the 5 factors, which in turn produces 5 infographics for you to review.

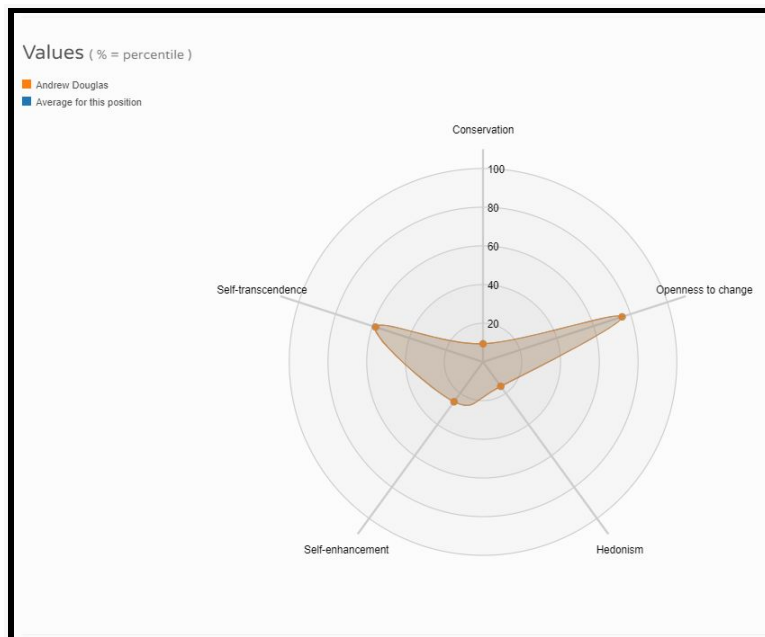
Select the **Insights** button



Here is an example of 1 infographic with a speech bubble to the right which highlights key words that the candidate has used.

As you scroll down the screen to look at the candidate insights in more detail, to the left of the page there are two titles;

- **Values**
The values chart describes the motivating factors that influence the candidate's decision-making based on the transcript of answers in each video.
- **Profile**
The profile chart includes a breakdown of the candidate's needs and values (based around the Big 5) and describes their personality traits and attributes based on the transcript of answers in each video.



One way in which you could take advantage of insights is if you already have your 'ideal' candidate in the role you are recruiting for. Create a video interview and ask that 'ideal' candidate to complete the interview, once complete, the interview should be stored in a folder that you create within the position you are recruiting for. As other candidates start to complete their interviews, you can compare the insights data to your ideal candidate. (Speak to your Tribepad Account Manager about this for more detail).

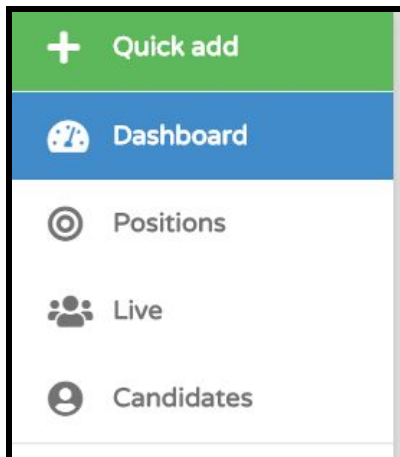
Creating a live video interview

At the moment live video interviewing is only available to be used via the stand-alone platform, it doesn't yet integrate with the ATS.

You can choose to schedule a live interview or create one 'now'.

Creating a live VI

1 - Login to the VI platform and select **Live** from the menu on the left-hand side of the screen.



2 - You will be presented with a new screen showing a list of interviews that have already been carried out.

Note; you will only be able to see the candidate details if you took part in the interview or if you are a Recruiter (in terms of user type).

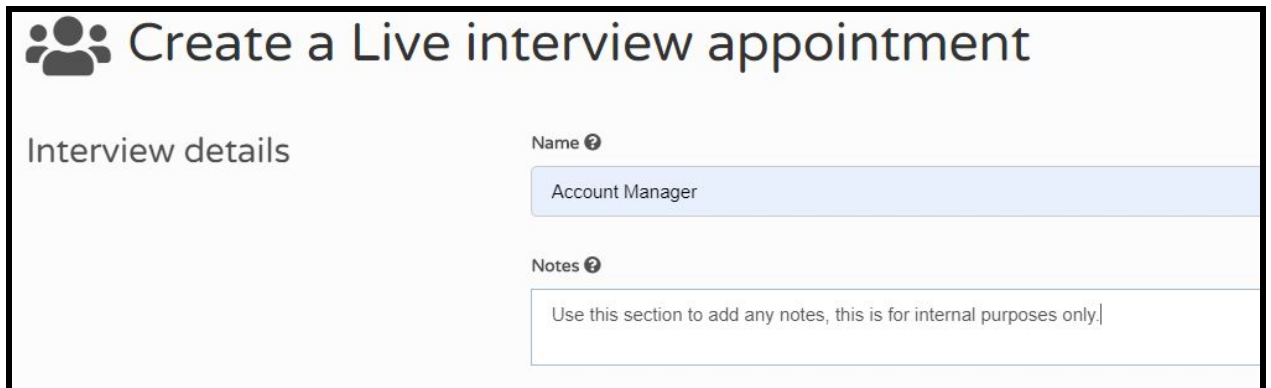
| Select | Candidate | Interviewers | Scheduled | Created |
|--------------------------|---|--|--|--|
| <input type="checkbox"/> | m c michelle+1@tribepad.com Test Vi Tribepad | Michelle Clarke michelle@tribepad.com | 23rd April, 2020 11:30 - 11:45 20 days ago | 23rd April 2020, 11:29:08 am 20 days ago Updated 20 days ago |
| <input type="checkbox"/> | Michelle Clarke michelleclarke21@yopmail.com Test | Michelle Clarke michelle@tribepad.com | 21st April, 2020 10:25 - 12:25 22 days ago | 21st April 2020, 10:21:01 am 22 days ago Updated 22 days ago |

4 - Select the **+ Create Live interview** button

5 - You will be presented with the Live appointment screen, which is broken down into 3 sections;

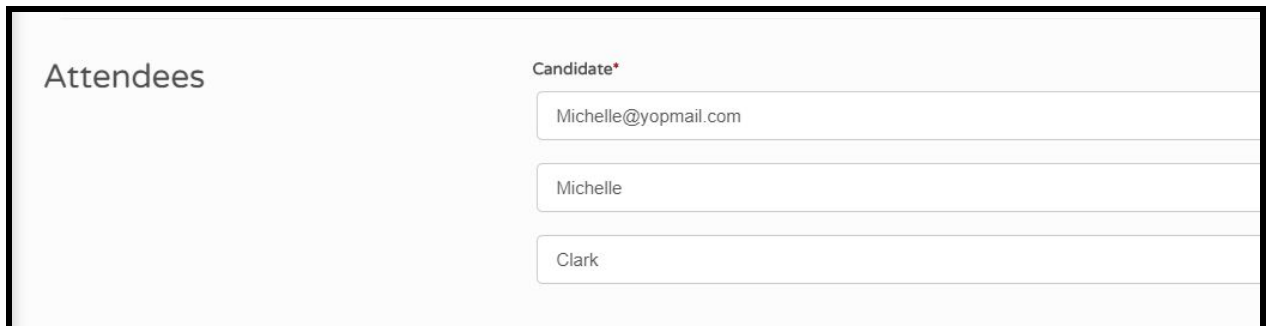
1. **Interview details**

Give your interview a name and add any relevant notes (notes will not be seen by the candidate).

The screenshot shows a form titled "Create a Live interview appointment" with a group of three people icon. The form is divided into two main sections. The left section is titled "Interview details" and is currently empty. The right section contains two input fields. The first is labeled "Name" with a help icon and contains the text "Account Manager". The second is labeled "Notes" with a help icon and contains the placeholder text "Use this section to add any notes, this is for internal purposes only."

2. **Attendees**

Your first attendee is your candidate, enter in their email address, first and last name.

The screenshot shows a form titled "Attendees". It contains three input fields stacked vertically. The first field is labeled "Candidate*" and contains the email address "Michelle@yopmail.com". The second field contains the first name "Michelle". The third field contains the last name "Clark".

3. **Attendees continued**

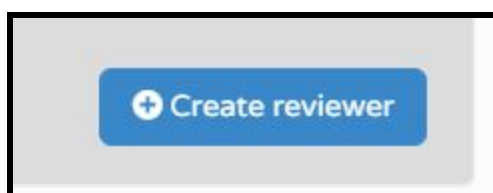
The other attendees are the interviewer/s (reviewers), you may have up to 3 interviewers in total.

There are 2 types of interviewer;

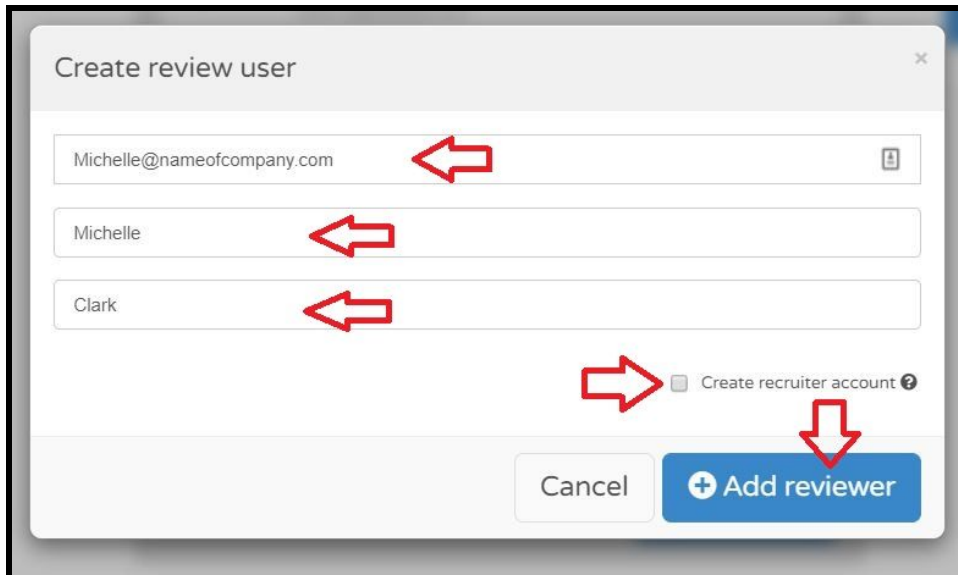
- **Recruiter**
A recruiter can arrange a live VI and access everything within the VI platform
- **Hiring Manager**
When the hiring manager selects 'live' from the menu they will have the option to 'join' the live video interview that they have been invited to.

If the reviewers do not yet have accounts on the VI platform you need to create one.

To create an account select **+ Create reviewer**



A pop-up will appear, enter the interviewers email address, first name and surname.



In the button right-hand side of the pop-up there is a check-box, if you want to create a recruiter account, select the check-box.

If you don't select the check-box, a hiring manager account will be created by default.

Once complete, select **+ Add reviewer**.

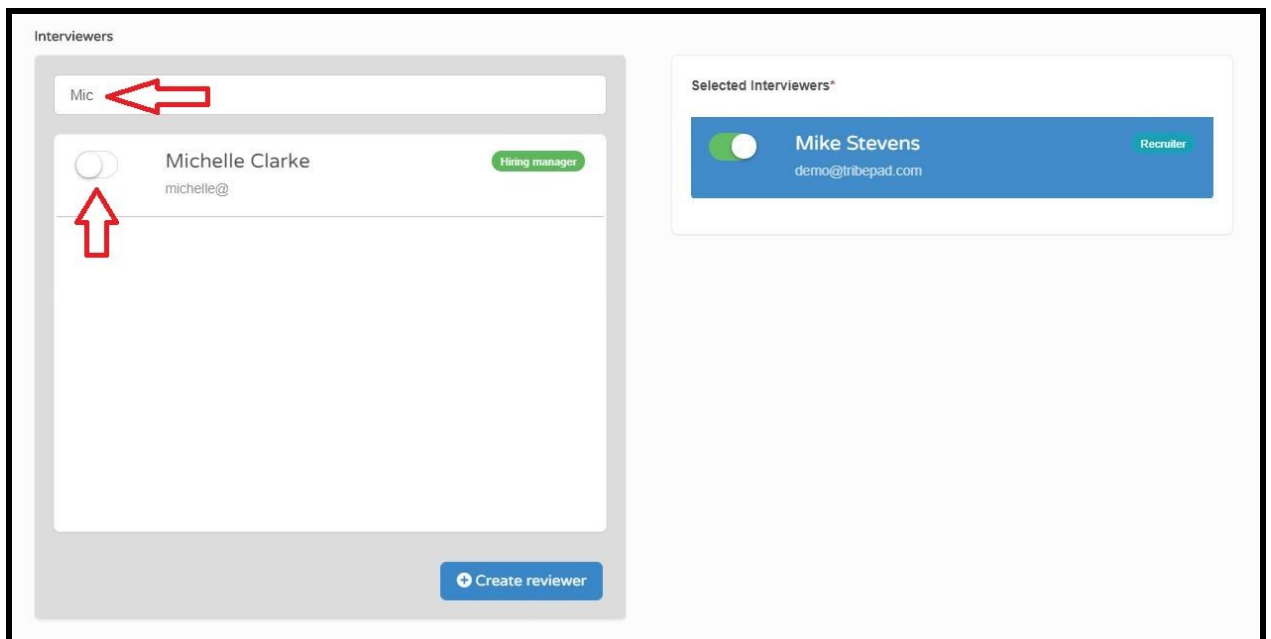
4. Attendees continued

If your reviewers already have accounts on the VI platform you will be able to find them by starting to type their name in the field at the top of the Interviewers box.

Select the toggle to the left of the reviewers name and they will appear on the right-hand side.

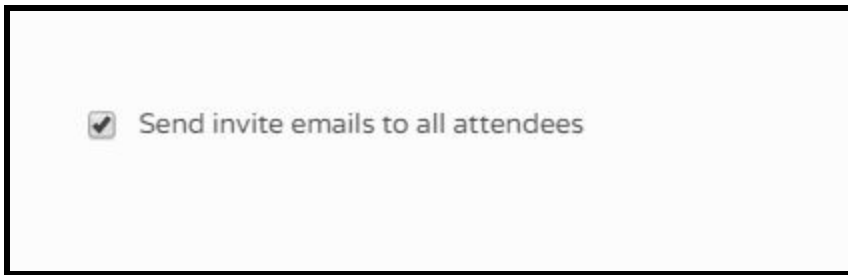
By default the organiser of the interview will already appear and they need to remain as an attendee.

If you make a mistake simply deselect the toggle.

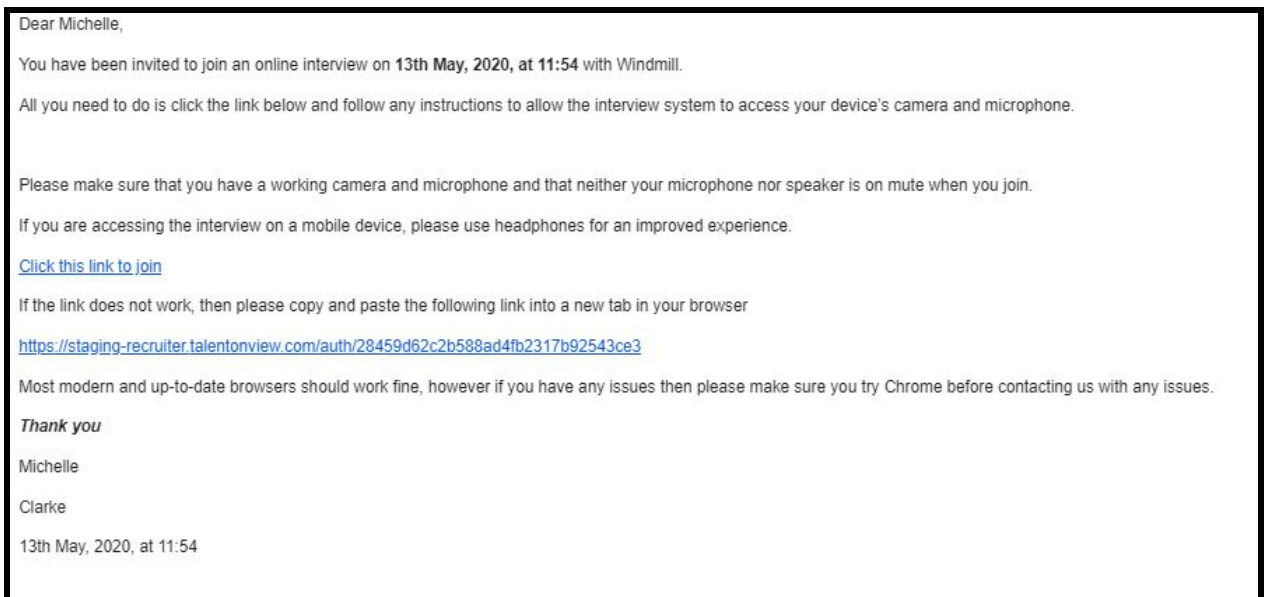


6. Send invites

It makes sense to send invitations so that each attendee is aware of the interview. The email will contain a link to join.



The email will look something like this.



7. When

You can choose to schedule a live interview or if you want to create an interview to start straight away you can do that too.

To schedule, select the desired duration, date and then select **Schedule appointment**.

To start an interview straight away, make sure the date and time are correct, then select **join NOW**.

