# How to Use Events

TREMS

You can use TREMS to automate the booking of interview events. After you create an event, you invite applicants to the event by changing the applicants' status.

## HOW TO: CREATE AN EVENT

1. To set up an event, choose **New event** from the PageUp menu. Complete the details.

Title your event something that you will be able to remember and retrieve. Name your event by the PVL number and type of event. Examples:
12345 Phone Screen
12345 Interview 1

This is an open text field. You can enter name only, name and email, name and phone – any information that might be useful.

Use the magnifying glass to choose the venue. It is tied to the event type.

The Owner defaults to the current user. If you want to change ownership on the event, you must choose someone that has Hiring Administrator or Division HR permission.

**Add the owner as a user** to the event so the owner can track the process.

Use the instruction space to indicate all the information the applicant needs to be aware of for the event. You also have an opportunity to share information in an email.

**Event details**

Posting Title:* TRAIN81707 Phone Screen

Type:* Phone Screen

Venue:* Telephone
⊕ Telephone

ADMIN SUPP ASST (A070800-COL
TRAIN81707-US

Owner:* Hiring Administrator
Email address: hradm@hradm.c

Add owner as user?: ● Yes ○ No

Contact name: Gunther Centralperk

Public instructions: We will call you using the number you supplied on application on the date and time selected. If you p we use your mobile number supplied on the applic or a different number, please contact Gunther Centralperk at 608-265-0836 or gunther.centralperk@wisc.edu.

2. After saving, add the available time slots. You can add singles or bulk. To add times individually, enter the date, and start and end time. **Positions** indicates how many interviewees you will allow in each timeslot (typically 1). Click **Add.** (We do not recommend inviting additional users.) *Timeslots must be at least 24 hours after they are created.*

**Time slots**

Add bulk timeslots: Add

Or Add a single timeslot:

Venue:*
Telephone
⊕ Telephone

| Event date:* | Start time:* | End time:* | Users: | Positions:* | |
|---|---|---|---|---|---|
| Feb 4, 2020 | 01:30 PM | 02:00 PM | 0 / Invite | 1 | Add |

| Active | Event date | Start time | End time | Attendees | Positions | Venue | | |
|---|---|---|---|---|---|---|---|---|
| ☑ | Feb 3, 2020 | 1:30pm | 2:00pm | 1 Users 0 Applica | 1 | Telephone | Edit | Remove |
| ☑ | Feb 3, 2020 | 2:30pm | 3:00pm | 1 Users 0 Applica | 1 | Telephone | Edit | Remove |

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3. Bulk timeslots lets you add multiple instances of the same day and time over a span of dates.



**\*Note:** If you encounter the error message below, click OK. Your time slot will be added. This warning occurs because all of campus uses the same "Venues" and the system thinks you are double-booking a physical space.
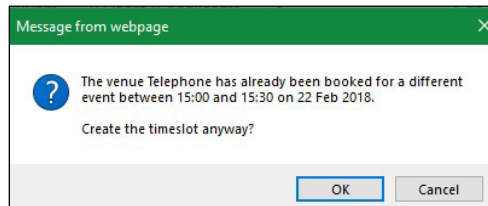


4. Set a reminder for your invitees and save your event.



The reminder can be set to weeks, days, hours, or minutes before the event.

Change this to "Yes" to send an email reminder for invited applicants.

## HOW TO: INVITE APPLICANTS TO AN EVENT

After you create an event, you will invite the applicants. To invite an applicant to select a time, you will change the status of the applicant to either Phone Screen or Interview. This is an example of the phone screen.

1.  Choose the applicants moving to the phone screen and choose **Bulk Move** or select applicants individually and change each status**.**

    **Bulk move**

    Bulk action status:  [ 3 Applicants ] Complete
    You have requested to move 3 applicants.
    Select a status to move these applicants to:

    Application status:  [ Phone screen                    ▼ ]

    [ Next > ]    Cancel

2.  Click the magnifying glass 🔍 to search for your event. You must fill in an event. Do not leave the Event field empty. This is an example of how to send an invitation for an event in which the applicants will choose their own appointment time.

    Create an event booking invitation for the applicant:  ⦿ Yes  ◯ No

    ℹ This applicant will be invited to attend a **Phone Screen** event

    > You **MUST** include the event.
    > **DO NOT** leave this field empty.

    **Event:**
    ◯  Allow applicant to choose an event
    ⦿  Select an event:

    Event:  [ TRAIN81707 Phone Screen ]  🔍 ✎

    TRAIN81707 Phone Screen Venue:
    TelephoneContact: Gunther Centralperk

    **Event timeslot:**
    ⦿  Allow applicant to choose the time slot
    ◯  Select a timeslot:
    Timeslot:  [                    ]  🔍 ✎

    No timeslot selected.

    Accept the booking on behalf of the applicant?  ◯ Yes  ⦿ No

    > Because the applicant is selecting a time slot, then this indicator should be "No". The applicant will both select and accept the time.

3. The suggested communication template provided gives all the necessary instructions to the applicant regarding how to choose a time slot. Read and customize the message to share additional information. You should also change the "from" e-mail address to either your email or the interview contact's email.



**Change this** email address to your own or the interview contact's email. This will allow the applicant to reply with any questions.

This indicates a merge field. The individual's name will merge.

4. When you complete the status change, the email invitation is sent to the applicant to make a booking. The applicant logs into their applicant account to choose a time.

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5. After the applicant clicks the link to make a booking, only the available times will appear. If another invitee has already selected a time, it will not appear in the list.

Please fill in all mandatory fields marked with an asterisk (*).

**Event booking - select timeslot**

| Event type: | Phone Screen |
|---|---|
| Event: | TRAIN81707 Phone Screen |

**Note:** any timeslot that is less than 24 hours away will not appear.

Please select a timeslot:*

| | Date | Start Time | End Time | Venue | Address |
|---|---|---|---|---|---|
| ○ | 3 February 2020 | 1:30pm | 2:00pm | Telephone | Wisconsin United States |
| ○ | 3 February 2020 | 2:30pm | 3:00pm | Telephone | Wisconsin United States |
| ○ | 5 February 2020 | 1:30pm | 2:00pm | Telephone | Wisconsin United States |
| ○ | 5 February 2020 | 2:30pm | 3:00pm | Telephone | Wisconsin United States |
| ○ | 7 February 2020 | 1:30pm | 2:00pm | Telephone | Wisconsin United States |
| ○ | 7 February 2020 | 2:30pm | 3:00pm | Telephone | Wisconsin United States |

Select the time that you are able to attend and click the "Confirm booking" button to accept the booking.

[ Confirm booking ]  [ Decline ]  [ Cancel ]

6. The applicant sees a confirmation screen and can add the event to their Outlook calendar. The event owner receives an email when an applicant has accepted an event invitation. Once confirmed, an applicant **does not** have the ability to decline or reschedule an event online. They must contact you directly to change an interview time or decline.

**Event booking details**

Booking confirmation

You have been booked into the following event:

| Event type: | Phone Screen |
|---|---|
| Event: | TRAIN81707 Phone Screen |
| Date: | 3 February 2020, 1:30pm to 2:00pm<br>Add to Google Calendar<br>Add to Other Calendar |
| Venue: | Telephone<br>Wisconsin United States |
| Contact name: | Gunther Centralperk |
| Event instructions: | We will call you using the number you supplied on your application on the date and time selected. If you prefer we use your mobile number supplied on the application or a different number, please contact Gunther Centralperk at 608-265-0836 or gunther.centralperk@wisc.edu. |

**Note:** If you are unable to attend this interview or need to reschedule, please notify the contact person listed above.

[ Print ]     [ Back to home ]

**Note:** Although an applicant cannot change the interview time or decline the interview once accepted, they can still withdraw their application for the position in their applicant account. **If an applicant withdraws, the event is automatically declined.** The hiring administrator **is not** informed of this. Only the division HR email address is notified when an applicant withdraws via the applicant account. Hiring administrators should check the interview schedule on a daily basis to confirm no applicants have withdrawn from the pool.

## HOW TO: CHANGE A BOOKING FOR AN APPLICANT

Once an applicant has selected and confirmed a booking, the applicant cannot make changes to the appointment. Should an applicant contact you to change a booking, follow these steps:

1. View the applicant card by choosing **Manage Jobs** (from the PageUp menu). Find the job in the list and click either the number of applicants or the applicant icon. Then click on the applicant's name or **View application** for the applicant that needs assistance. This opens the Applicant Card.



2. In the History tab of the card, you will see where the applicant accepted the booking. Click **Edit** and the details will appear.

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3. Clear the current event timeslot details by clicking the eraser.

**Event timeslot:**

○ Allow applicant to choose the time slot

● Select a timeslot:

Timeslot: 3 Feb 2020 1:30pm 🔍 ✐

⊕ 3 Feb 2020 1:30pm - 2:00pm

4. View the remaining available times by clicking the magnifying glass. Discuss with the applicant and choose a new timeslot. If there are no remaining timeslots, click the **Add New Timeslot** and set up an additional time.

| Event timeslot date: | | Search | Add New Timeslot |
|---|---|---|---|

| Start date / time ▽ | End time | Positions | Booked | Venue |
|---|---|---|---|---|
| Feb 3, 2020 1:30pm | 2:00pm | 1 | 1 | Telephone |
| Feb 3, 2020 2:30pm | 3:00pm | 1 | 0 | Telephone |
| Feb 5, 2020 1:30pm | 2:00pm | 1 | 0 | Telephone |
| Feb 5, 2020 2:30pm | 3:00pm | 1 | 0 | Telephone |
| Feb 7, 2020 1:30pm | 2:00pm | 1 | 0 | Telephone |
| Feb 7, 2020 2:30pm | 3:00pm | 1 | 0 | Telephone |

Page 1 of 1 Event timeslot information:      Records 1 to 6 of 6

5. Do not make any changes to the two boxes under the "Applicant change statuses:" section heading.

6. **Change the** "Accept the booking on behalf of the applicant?" to **YES.**

**Applicant change statuses:**

If selected, the applicant will be moved into a new status when booking is:

Accepted: Phone Screen Accepted ▼

Declined: Phone Screen Declined ▼

Accept the booking on behalf of the applicant? ● Yes ○ No

7. "E-mail: Applicant:" defaults to **YES.** This will send an email confirmation to the applicant. Customize the email as needed. Change the "From:" email address to your own email or the event contact's email address.



### HOW TO: REVIEW EVENTS



1. To see the events you have created in the system, use the PageUp menu and choose **Manage events.** The "Events" tab will show you all of the events you have created in the system. If you need to change anything about the event or the timeslots (add, remove, adjust) click on Edit.



2. To view individual timeslots and whether each has been booked, view the "Timeslots" tab. Click "Bookings" to view the details (e.g. the name of the person booked into that timeslot).

3. To add the booking to your Outlook calendar, click on the Calendar icon.



4. The appointment typically will download to the taskbar at the bottom of your browser window. Depending on which browser you are using, you may see the message shown below or a similar icon. Open the appointment.
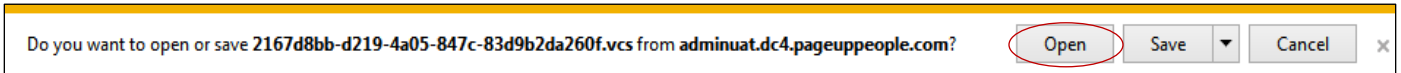


5. Outlook will open the calendar appointment. You can customize the information in the invitation (i.e. type in the name of the person being interviewed, attach the interview questions).
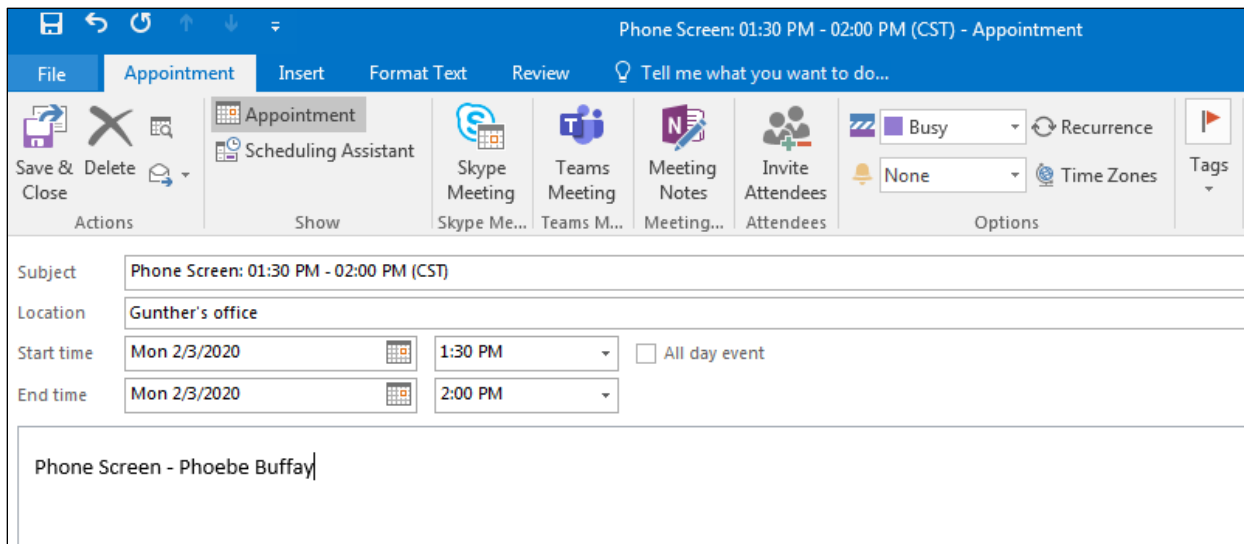
**HOW TO: VIEW THE EVENT BOOKING REPORT**

You can view all bookings for an event in a report available on the job card.

1. Open the job card.
2. Click the Reports tab.
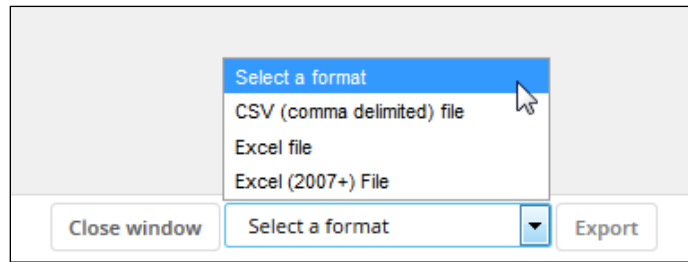


3. To run the report and view the results on your screen, click the report title.



4. The initial screen will show a count of the interview bookings. Click the + sign to expand the details.

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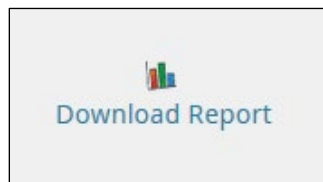
**Report**

**Event Booking-Job Card**

| Event type | Count (Event type) | JEMS Transaction ID | Posting Title | Event title | Applicant last name | Applicant first name | Phone | Applicant cell | Event type | Applicant e-mail | Booking status | Event date | Start time | End time |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ⊟ Phone Screen | 4.00 | | | | | | | | | | | | | |
| | | TRAIN81707-US | ADMIN SUPP ASST (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS) | TRAIN81707 Phone Screen | Buffay | Phoebe | | 5555555555 | Phone Screen | ii@ii.com | Accepted | Feb 3, 2020 | 13:30 | 14:00 |
| | | TRAIN81707-US | ADMIN SUPP ASST (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS) | TRAIN81707 Phone Screen | Geller | Ross | | 5555555555 | Phone Screen | ff@ff.com | Accepted | Feb 3, 2020 | 14:30 | 15:00 |

5. To download the results, choose the file format from the menu at the bottom of the results window and Export. Choose Excel (2007+) only if running version 2007 or higher of Excel.



6. Click Download Report. (Depending on the web browser you are using and how Microsoft Excel is set up on your computer you may need to save the file and "enable editing" before being able to work with the data.)





7. To move directly to the Excel download, click on the Excel icon instead of the Report Name.