



## FEATURE UPDATE

# Show job application overview on the customer and candidate portal

November release

This feature helps you involve your clients and candidates in the job application process by providing detailed information about job applications and application steps. In addition to communicating by e-mail and phone, we can now display extensive applicant and application information on the portal. This lets customers and candidates access their job application details from a central location. Candidates can also download their appointment and add it to their calendars.

This document describes the configuration steps needed to activate these controllers.

## Setup

### Permission sets/profiles

Activate the following object and field details in the permission set or profile:

- Portal Controller Object. Activate the new record types for administrators:
  - Job Application Overview
  - Job Application Appointments
  - Job Application Status Log
  - JobAppl Overview-Download appointment (msf\_\_JobApplication\_Overview\_Download\_ICs\_\_c) New field, administrators must have all rights.
- Portal Field Object. Activate the new record types for administrators:
  - Job Application Overview List Field
  - Job Application Overview Detail Field
  - Job Application Appointments List Field
  - Job Application Status Log List Field
  - Give all rights for the Show Date Only field (msf\_\_Show\_Date\_Only\_\_c)

### Object management/page layout

- Portal Controller object.
  - For the new controller, link the SFJobApplicationOverviewController Layout to the Job Application Overview record type in the page layout allocation. The other 2 record types have the standard layout.

- Portal Field object.
  - Add the value msf\_\_Job\_\_c as a list value in the Object field, if it has not already been added. When you add the value, activate it for the record types Job Application Overview List Field and Job Application Overview Detail Field.
  - If the value is already available in the Object field, activate it for the record types Job Application Overview List Field and Job Application Overview Detail Field.

### **Custom metadata types**

The custom metadata types are used to set which application statuses are visible on the candidate and customer portal. New fields have been added to the Job Application Status Setting for this purpose. Adjust the page layout from this setting and put the new fields on the page:

- Visible on Customer Portal Account
- Visible on Candidate Portal

## **Configuration**

### **Portal Controller**

Create a new portal controller for the application overview and create fields for the list and detail view.

### **Job Application Overview**

Checking the box for Jobappl Overview-Download appointment lets you enable the calendar download option on the candidate portal. You can define both list and detail fields.

< image follows >

### **Job Application Appointments**

To show appointments linked to the corresponding job application, you need to set up a controller and link it to the Job Application Overview controller. Only list fields can be defined for this controller. All list fields must be set to 'Read Only'.

< image follows >

On the portals themselves, two fields are automatically added to the left of the defined fields: The names of external participants and the names of internal participants. These are always shown on the left.

< image follows >

## Job Application Status Log

You can also display the status log of the job application in question. For this to work, you have to configure a controller and link it to the job Application Overview controller. Only list fields can be defined for this controller. All list fields must be set to 'Read Only'.

< image follows >

## Custom metadata types

Further configuration is done via Custom metadata types.

- Portal Domain Menu Item. You can create a new tile for both the candidate and client portals. Go to controller type and choose 'SFJobApplicationOverview'. For controller name, enter the name of the newly created Job Application Overview controller. Please note that menu items must be given unique names. You will also have to refresh the portal configuration in order to make the new tiles available.
- Job Application Status Setting. Activating the Visible on Candidate Portal and Visible on Customer Portal Account setting lets you decide whether the candidate or customer can see individual application statuses.

## Portal translations

Logging into the portal as an administrator lets you export the translations for this controller to MSR.

You can then edit them in the App starter, Translations and activate them again on the portal