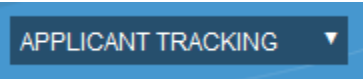


Managing Applicants Reference Guide

Quick easy steps of Viewing Applications and Changing Workflow States

For Staff and Faculty Postings

Revised July 2013

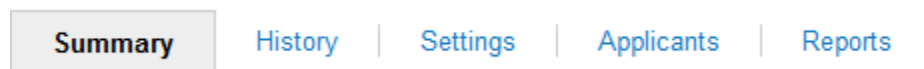
1.  Select to view posting and applications, update status of applicants, and complete Post Hire Details and Hiring Proposal. To access postings go to **Postings** in blue tool bar and select either **Staff** or **Faculty** at drop down. Use the Search process to locate the appropriate requisition from the default search “**Postings**”.

2. Viewing Applications

- To view applications identify the desired requisition and go to **Actions** on the right side of screen and select **View Applicants**.


or

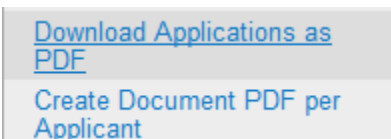
Open the appropriate requisition and select **Applicants** from the tabs at top of posting.



- When the search identifies the appropriate candidates for that posting, you may view the applicants by selecting **View Application** from **Actions**.

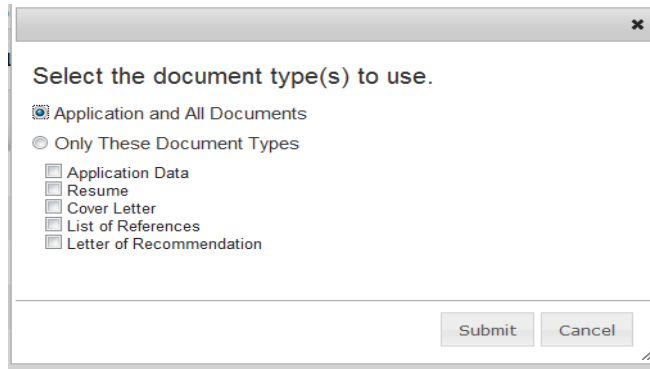
3. Copying Applications

- Your options for saving/printing applications as PDF files are found in the drop-downs found at  on the right hand side of the screen.

- A dropdown menu with two options: 'Download Applications as PDF' and 'Create Document PDF per Applicant'.

- Select **Download Applicants as PDF** to download one or more applicant files into a single PDF file. Check the box to the left of each applicant name you want to create separate PDF files for.

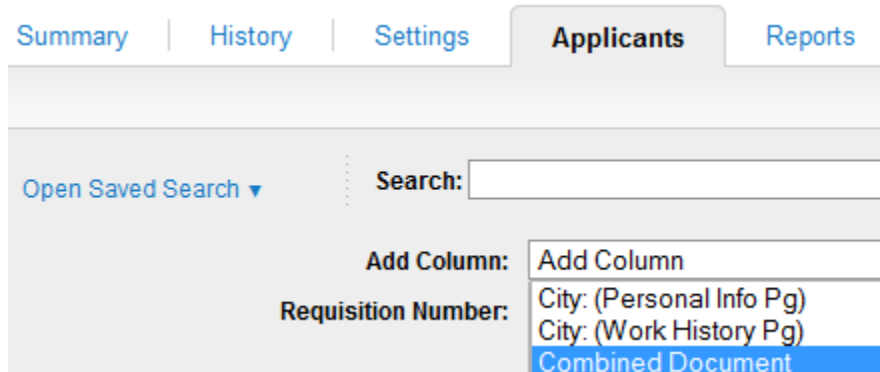
- The system will prompt the following screen, showing application documents you may select to download. Select the desired documents and select **Submit**.



- Select **Create Document PDF per Applicant** to create a singular application file for each applicant. First check the box to the left of each applicant name you want to create separate PDF files for. Then, after selecting **Create Document PDF per Applicant** the following message will appear at the top of the screen.



- Next step is to add the column titled **Combined Document** to the list of applicants.



- After **Combined Document** is added as a column click on it, one applicant at a time. That applicant file will then appear as a PDF document for you to save/print.

4. Changing Workflow States

Important Change Within a search only the hiring managers assigned to that requisition, or EAD Users and HR Users may change workflow states. Hiring managers actions are limited to those workflow states they own. Hiring managers cannot move an applicant from EAD/Short List Approval or Hired.

- Use the Search process to locate the appropriate requisition. Then, for the desired requisition go to **Actions** on the right side of screen and select **View Applicants**.
- For a single applicant check the box at the left of the column title Full Name, or check multiple boxes to change the workflow state on several applicants at the same time. Select **Move in Workflow** from the drop-downs found at **Actions**.


Move in Workflow

- **Move in Workflow** will only appear in **Actions** IF all applicant workflow states shown can be moved by hiring manager. You may need to filter your search to limit the visible Workflow States to those you have permission to move. Do not include **EAD/Short List Approval** workflow state or **Hired** workflow state.

Workflow State:

- Draft
- Under Review by Hiring Manager MP**
- Under Review by HR
- Under Review by Hiring Manager OS


- At **Editing: Workflow States for xxxx Applicants** you may change all applicants to a single workflow state, or you may change each applicant to a different workflow state.


 **Editing: Workflow States for 3 Applicants**

Change for all applicants

Applicant	Current State	New State	Reason
	Under Review by Hiring Manager MP	<input type="text" value="Select a workflow state..."/>	
	Under Review by Hiring Manager MP	<input type="text" value="Select a workflow state..."/>	
	Under Review by Hiring Manager MP	<input type="text" value="Select a workflow state..."/>	

- While the system is processing your changes you will see the following at the top of the page.

 **Started the process to transition these applicants. This may take several minutes.**

It is not necessary to remain on the page while the changes are taking place. The changes are occurring in the database and this message will not change once they are complete. If you want to verify the changes before leaving that page you may try refreshing your page at the refresh button. 

5. You may also change applicant workflow states, one at a time, by opening that applicant's application and selecting the appropriate workflow state at [Take Action On Job Application](#) ▼

6. EAD Requirements – PeopleAdmin Tools for Short List

EAD requirements for requesting EAD concurrence on Short List remain the same. Instead of the previous links associated with Applicant Log and Applicant Contact List, PeopleAdmin system now provides three new tools to assist in providing the required information to EAD.

- **Applicant Contact List:** Provides a list of applicants, with e-mail and mailing addresses. Select from Saved Searches. May export results to Excel.
- **EAD Applicant List:** Provides the list of applicants to be used for the Applicant Log. Select from Saved Searches. May export results to Excel.
- **Position Qualifications Summary:** Select from available reports at:
[Summary](#) | [History](#) | **[Applicants](#)** | [Reports](#) | [Hiring Proposals](#) | [Associated Position Description](#)
This report can be saved to PDF for reporting to EAD.

7. Closing

To take action to close requisition, select the appropriate action from

[Take Action On Posting](#) ▼

8. Post Hire Details

There are no changes in requirements for Post Hire Details. Complete before moving a position to Filled. The Post Hire Details page will not appear in the Summary section of the requisition until the position has been closed.

9. Emails to Applicants

Standard email to Not Hired applicants remain the same. These e-mails will not be sent to the applicants until the status of the Posting is moved to Filled.