Manage applications

Revision history

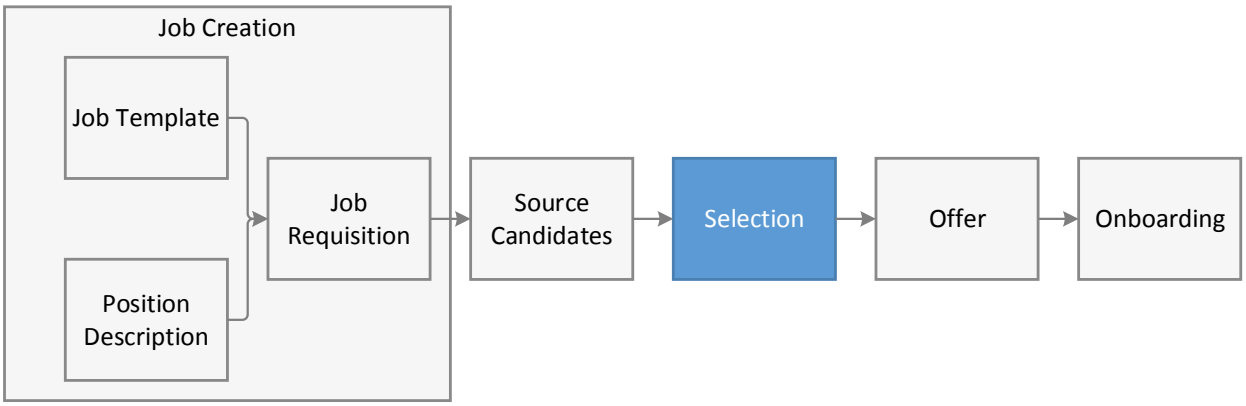
Last modified on	Author	Reason
3/8/2019	CHRS Recruiting Training Team	Initial publication
3/13/2019	CHRS Recruiting Training Team	Minor clarifying updates

Introduction

This guide shows you how to manage applications from the Manage applications page. Manage applications is a search that shows applicants for a particular job. When you open the page, you see the results of the most recently run search.

You can use the Manage applications page to sort and organize applicants, as well as perform multiple tasks with applicants.

Process diagram



Managing applications typically occurs during the selection phase of the recruitment process.

What you will do

- View applicants
- Interpret information on the applicant lists
- Identify actions you can take on applicant lists
- Create applicants
- Search by answers to questions
- Merge applicants

Definitions

Term	Definition
Applicant card	The applicant card is a complete summary of an applicant in the system, including their personal details and application history.
Application status	A single stage of a recruitment process. Campuses pre-determine their recruitment processes based on the type of recruitment. Application status identifies where an applicant is in that process. Example: First Interview Successful.
Flag	Flags are visual cues for users when reviewing applications.

Open Manage applications

In CHRS Recruiting, you can view applications from several starting points. These starting points open the Manage applications page with a selection of applicants.

- Dashboard
- Side menu
- Job requisition

When to view applications

- Recruiters view and organize applicants as daily activity.
- Hiring managers view applications during the recruitment process.
- Search committees review applications during the recruitment process.

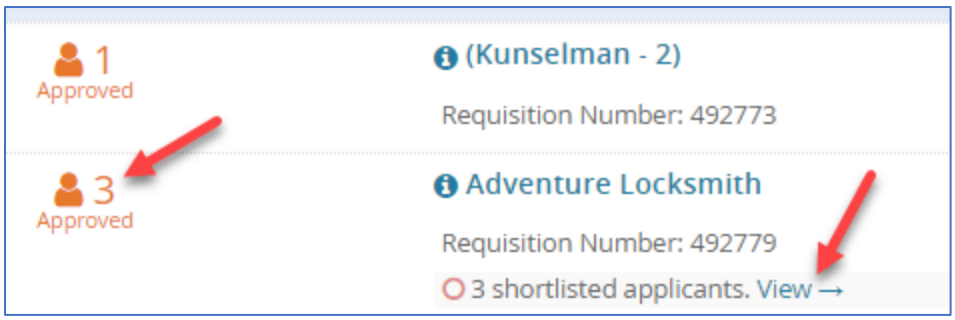
Prerequisites and assumptions

- You have permission to view applicants.
- You have permission to view jobs
- You have permission to view applications from the job card.
- You can access the Recruiter Dashboard.

How to view applicants from the dashboard

The Dashboard provides a high-level overview of the applicants that have applied to your jobs.

- On the Recruiter Dashboard, you can click the Applicant icon or a View link to show the applicants for that job.



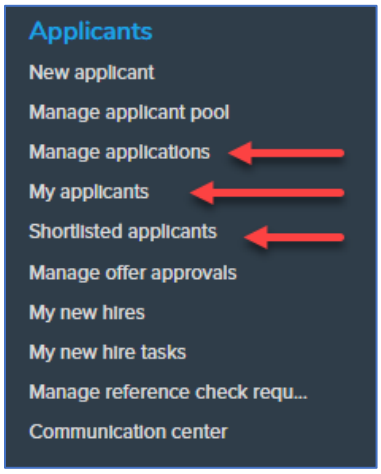
- On the Hiring Manager Dashboard, you can click the links on the Applications widget to see applicants.

How to view applicants from the side menu

From the side menu, you can use several links to view applicants. To access a set of applicants, click one of these options:

- **Manage applications** shows applications for jobs that you posted.
- **My applicants** shows applicants that have been assigned to you to review.
- **Shortlisted applicants** shows applicants for jobs that you posted who have been shortlisted.

Depending on your role, your side menu might have fewer options.



How to view applications from the job card

From the job card, click **View Applications** at the top of the page.

What happens next

The Manage applications page opens, showing selected applicants.

Related documents

REC_RG_02_Recruiter Dashboard.docx

Interpret information on the applicant lists

The Manage applications page displays information about applicants. Some of this information is in graphical form for quick visual sorting.

When to interpret information on applicant lists

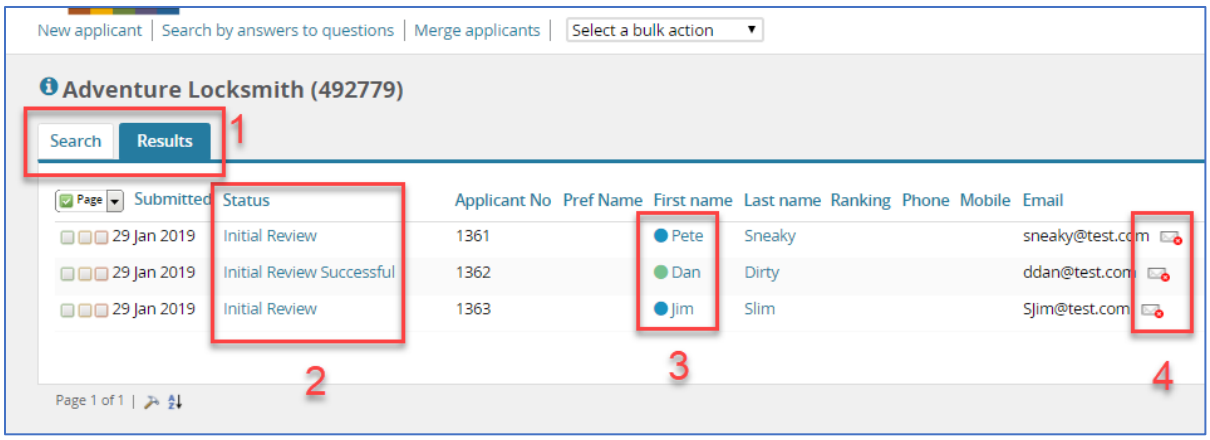
- You are examining applicants for a position.
- You need to quickly assess a large population of applicants.

Prerequisites and assumptions

- You have permission to view applicants.
- You are on the Manage applications page.

Applicant list layout (left side)

The graphic shows the left side of the applicant list.

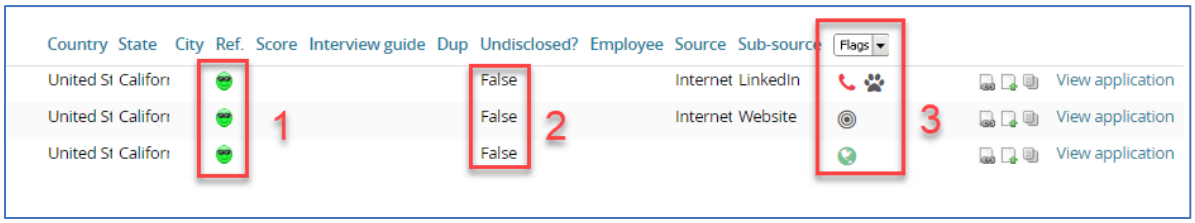


#	Object	Information
1	Search and Results tabs	The Manage applications page is a search result. It shows applications for a particular job. You can click the Search tab to change the search parameters. Your last search is retained by default, so if you need to see a new set of applicants, you can adjust your search on the Search tab. If no job is specified, the search returns zero results.
2	Application status	The Status for each applicant is shown.
3	Activity indicator	The blue and green circles show the applicant's activity level. Activity is determined by the most recent status change that was initiated by the applicant. Administrators determine the time interval before the status shows inactive. 

#	Object	Information
4	Email icon	The icon to the right of the email address indicates a problem with emailing the applicant. In this example, the email addresses were invalid.

Applicant list layout (right side)

The graphic shows the right side of the applicant list.



#	Object	Information
1	Referred by employee	The green smiley face icon indicates that this applicant was referred by an employee.
2	Undisclosed column	This setting allows recruiters to track an application against a job without the candidate being aware (the application is hidden from view on the applicant portal).
3	Flags	Flags are visual cues that identify important information about applicants or applications. Flags can be set on the applicant or on the application, and their meaning is configured by CO Super Users.

What happens next

You can take several actions on this page, described in the next section.

Related documents

Manage applications

Applicant Card - Undisclosed application

Flags

Identify actions you can take on applicant lists

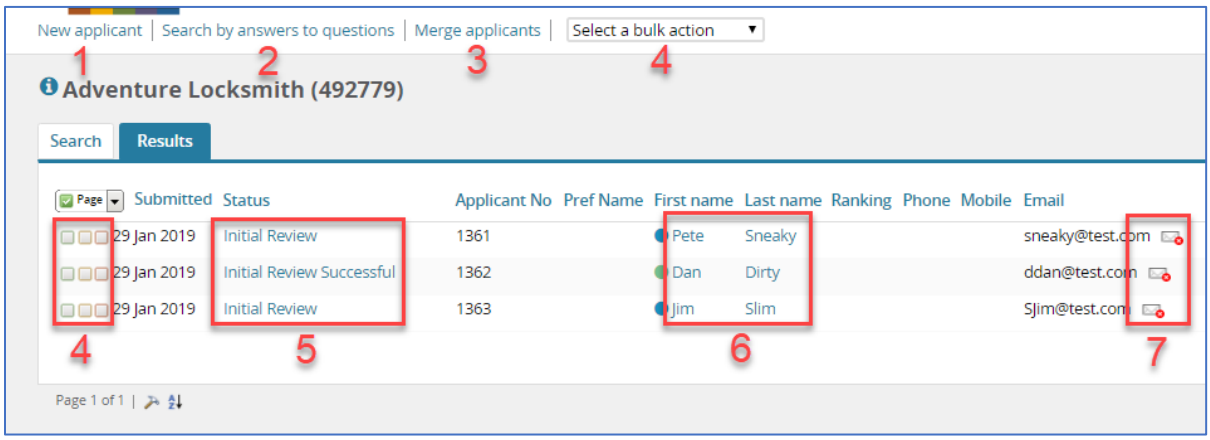
You can complete several actions on applications directly from the applicant list, without going into the applicant card.

Prerequisites and assumptions

- You are on the Manage applications page.
- You have permission to view applicants.
- You have permission to update applicants' statuses.
- You have permission to edit applicants' information.

Applicant list actions (left side)

The graphic shows the left side of the applicant list.



#	Object	Information
1	New applicant	Create an applicant directly in the system. Applicants show as employee referred. You might use this feature when you are speaking with an applicant on the phone.
2	Search by answers to questions	You can search for applicants based on their answers to questions on their application forms.
3	Merge applicants	If two applicants appear to be the same person, you can merge them into one applicant.

#	Object	Information
4	Applicant check boxes and Select a bulk action menu	You can select applicants using the green, yellow, and red check boxes on the left. The colors have no meaning except a way to group applicants for a bulk action. With the applicants selected, you can use the **Select a bulk action** menu to perform a bulk action on selected applicants. Bulk actions include: • Bulk apply • Bulk categorize • Bulk assign • Bulk communicate • Bulk compile and send • Bulk document merge • Bulk export • Bulk invite to apply • Bulk move • Bulk move and send • Bulk reference check • Bulk send • Bulk task/reminder
5	Application statuses	Click the application status to change the status of the applicant. You can also do this with bulk move.
6	Applicant name	Click the applicant's name to open the applicant card.
7	Email icon	Click the email icon to edit the applicant's information, including their email address, name, and home address.

Applicant list actions (right side)

The graphic shows the right side of the applicant list.

#	Object	Information
1	Flag selector	Select a flag from the list to sort applicants with that flag to the top.
2	Link icons	Use these three icons to view information about the applicant: • View resume • Download resume • View answers
3	View application	This link opens the applicant card.

Related documents

Flags

Manage applications

REC_RG_20_Bulk Communications.docx

Create applicants

You can create applicants to get them into the CHRS Recruiting system without requiring the applicant to go through the career website. To apply for a position, the applicant must complete an application form. After you create the applicant, you can invite the applicant to apply for the position and complete the form.

Applicants can be added to the CHRS Recruiting system in two ways:

- Applying to a job through the campus website
- Being added by the HR/FA representative.

When to create an applicant

The following scenarios are examples of when you might create an applicant:

- You had a phone conversation with a potential applicant and need to add the applicant to the system without requiring the applicant to go through the campus website to apply for a job.
- You might add applicants in bulk if you receive a list of potential applicants or collected their information at a conference or a job fair.

Prerequisites and assumptions

- The applicant is not already in the CHRS Recruiting system.
- You have permission to view applicants.
- You have permission to create applicants.
- You are on the Manage applications page.

About disclosure

If you choose not to disclose the job to the applicant, the applicant receives communications relating to the job. The job is not displayed on their applicant portal.

At some point, you must disclose the application so that the applicant can complete the application form and engage in the recruitment process.

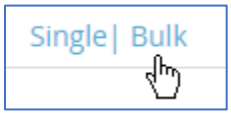
How to create an applicant

1. Starting from Manage applications page, click **New Applicant**.
2. In the Personal Details form, do the following tasks:
    a. Ensure that all mandatory fields are complete.
    b. Upload any applicable documents, including the resume or C.V.
    c. In the Form field, specify the application form for the applicant to complete.
    d. Decide whether to disclose the application to the applicant.
3. In the Categories/Tags/Talent Pools form, do the following tasks:
    a. Select the talent pool to which to add the applicant.
    b. Add categories or tags (as many as needed).

How to create applicants in bulk

You can create multiple applicants if you need to add several applicants to a job at the same time. Before you can create applicants in bulk, you must first create a spreadsheet file that you will upload.

1. Create a Microsoft Excel spreadsheet or comma-separated values (CSV) file. Your file should include the following column headers:
    a. First Name
    b. Last Name
    c. Email
    d. Phone Number
    e. Company
    f. Role
    g. LinkedIn URL
2. Starting from Manage applications page, click **New Applicant**.
3. On the top right of the New Applicant page, click **Bulk**.



4. Click **Choose file**.
5. Select the Microsoft Excel file to upload.
6. Select a source from the **Source** menu.
7. In the **Categories/Tags/Talent Pools** form, do the following tasks:
    a. Select the **Talent pool** to which to add the applicant.
    b. Add **Categories** or **Tags** (as many as needed).
8. Click **Submit**. A confirmation screen displays the number of successes and errors.

Guidelines

- If you create an applicant without disclosing the job, you must disclose the job before you invite the applicant to apply.
- The minimum fields required in the Excel or CSV file are: first name, last name and email address.
- The file can contain up to 200 candidates maximum.
- The columns of the Excel or CSV file can be in any order and not all columns need to be presented in the file however the columns labels MUST match the following format: First Name, Last Name, Email, Phone Number, Company, Role, and LinkedIn URL.
- Adding applicants in bulk ignores the applicant mandatory fields check so further information might be requested when editing a candidate after the initial upload.

What happens next

- The applicants are in the CHRS Recruiting system.
- You can invite the applicants to apply to jobs.
- Applicants complete the application form.

Related documents

Applicants – Manually creating an applicant

Candidate Relationship Management – Bulk upload

Search by answers to questions

You can search for applicants by answers to questions that applicants entered on their application forms for a particular job.

The Manage applications page is a Results tab of a search. When you search by answers to questions, you can select the question from the application form, and select the answer. This information is added to the search parameters and run against the current job applicants.

When to search by answers to questions

You might have many reasons to search by answers to questions. For example, you might consider a particular answer to be:

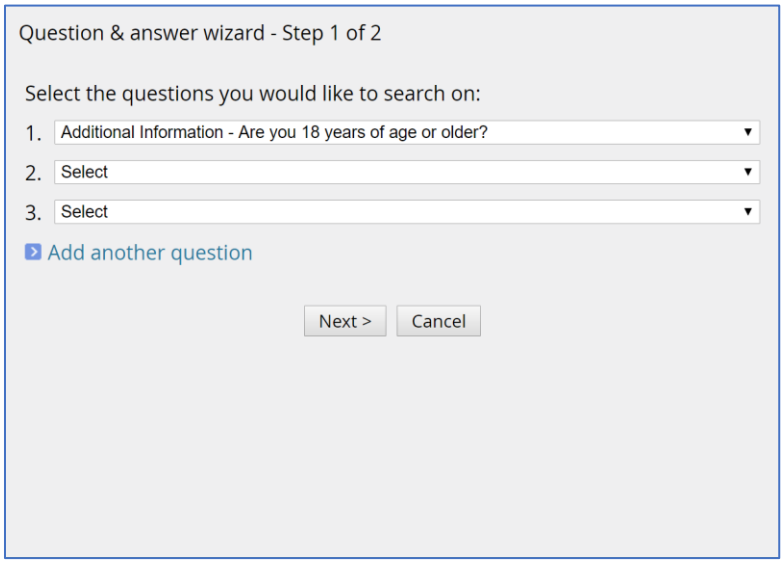
- An automatic disqualifier.
- Important enough to shortlist some applicants.

Prerequisites and assumptions

- Applicants completed their application forms.
- You have permission to view applicants.
- You have permission to view applicants.
- You are on the Manage applications page.

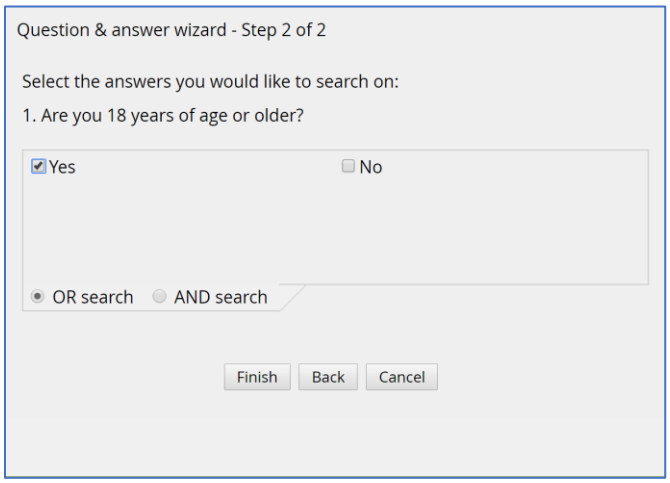
How to search by answers to questions

1. On the Manage applications page, click **Search by answers to questions**.
2. Select the questions. You can select multiple questions.



3. Click **Next**.

4. Specify the answer to search for and select whether to use the AND or OR operator to combine questions.

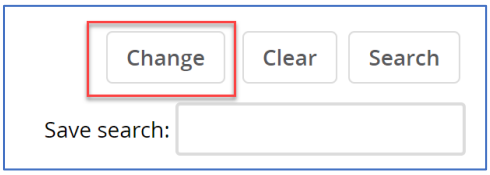


5. Click **Finish**.

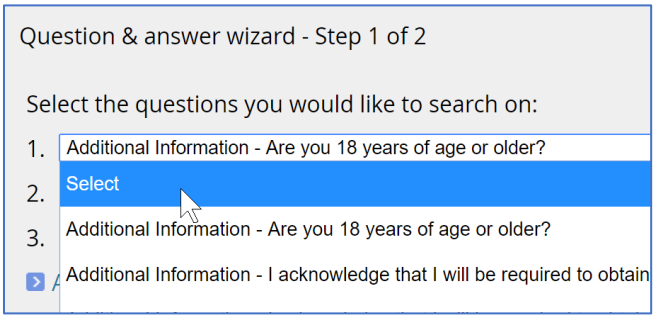
How to remove a question from the search

If you are searching for applicants based on answers to questions and your search result is empty, you need to change or remove a question.

1. Click the Search tab.
2. Scroll all the way to the right of the page. You can then see the Change, Clear, and Search buttons.
3. Click **Change**.



4. Edit the questions. To remove a question, from the question list, select **Select** (at the top of the list).



5. Click **Next**.
6. Click **Finish**. The question/answer pair is removed from the search, but all other search fields remain populated.

Guidelines

- Searches for applicants by answers to questions requires an exact match. For example, you cannot search for a range of dates for graduation.
- Do not use the Clear button on the Search tab to remove a question/answer pair. This button clears the whole search, including the position information.

What happens next

- You can select and perform bulk actions on the applicant set.
- Search results are saved, so next time you visit the Manage applications page, you will see the same results until you update the search.

Related documents

Searching applications

Merge applicants

Occasionally, the same applicant can have multiple instances in the CHRS Recruiting system. You can merge applicants if you find two applicants that are the same person.

Duplicate detection

CHRS Recruiting system can automatically detect potential duplicates. Any detected duplicates will be flagged with a yellow "!" triangle symbol on the Manage applications page. An easy way to find flagged duplicates is to sort applicants by the Duplicate column (Dup). You can do this by clicking on the column header.

When to merge applicants

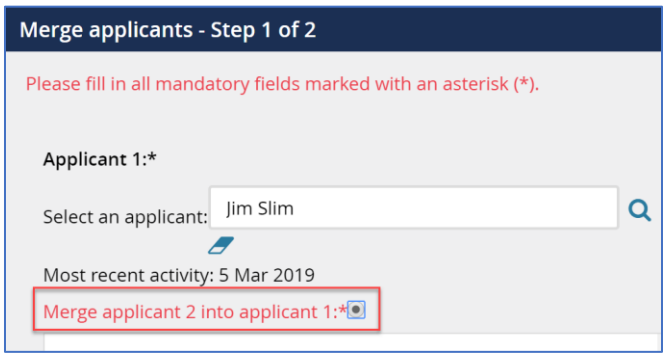
The CHRS Recruiting system detects duplicate applicants.

Prerequisites and assumptions

- You have permission to view applicants.
- You are on the Manage applications page.
- You have permission to edit and merge applicants.
- You have verified that the applicants are actually duplicates.

How to merge applicants

1. Click **Merge applicants** at the top of the Manage applicants page.
2. Search for and select applicant 1.
3. Search for and select applicant 2.
4. Decide which applicant to merge the other applicant into.



5. Click **Next**.
6. On the Send an email to the applicant screen, edit the email to be sent to the applicant email addresses.
7. Click **Merge**. A prompt opens asking if you are sure that you want to merge the applicants.
8. Click **OK** to confirm the merge.

Guidelines

When you merge applicants, you might also need to remove an application if the same applicant has applied for the same job twice. To remove an application, change the applicant's status to Removed.

What happens next

- The applicants are merged into a single application.
- Field values from one applicant are merged into the selected applicant.
- CHRS Recruiting system sends the email out to the applicant email addresses to inform them of the merge.

Related documents

Duplicates