



How To:
A PeopleAdmin User Guide





User Guides: Table of Contents



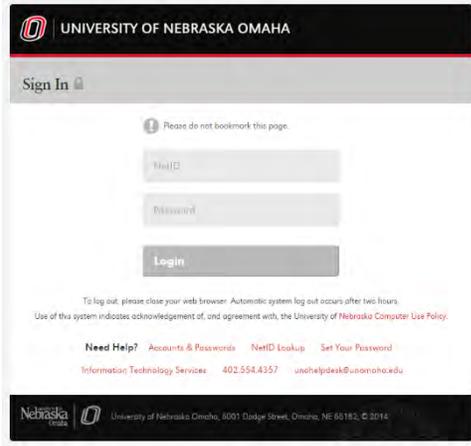
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User Guides: Signing In and Creating Shortcuts

Shibboleth and Duo

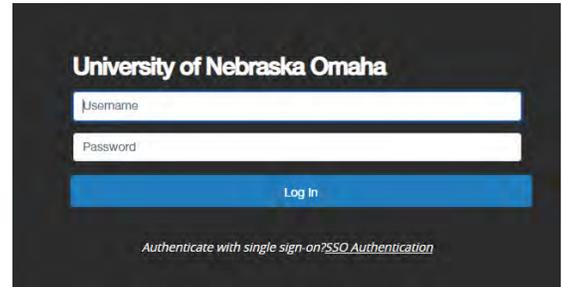
To sign in to PeopleAdmin securely, we use TrueYou Duo Sign In. Use the following web address to be directed to the secure sign on window.

<https://unomaha.peopleadmin.com/hr/shibboleth>.



Use your NetID credentials (exactly the same as your email Username and password). Duo will verify your identity based on the preferences you set up in TrueYou.

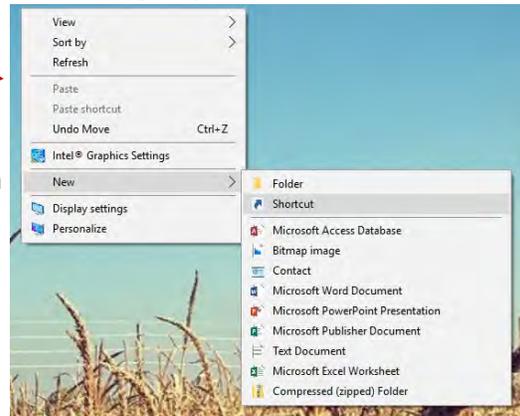
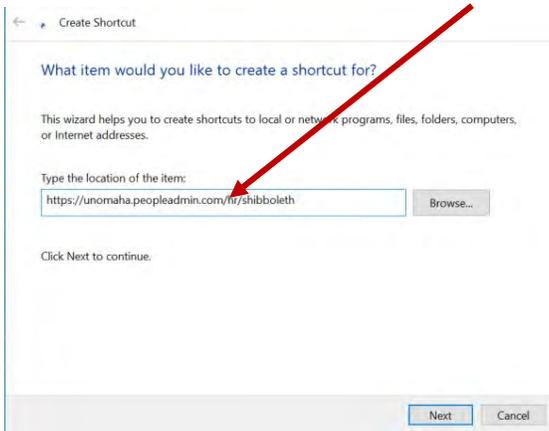
Do not use this page to log in.



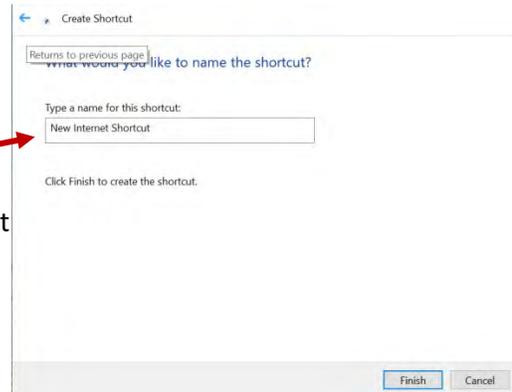
To create a shortcut for your desktop, use the following steps.

1. Right click on your desktop.
2. Choose "new" →
3. Choose "shortcut" →
4. In the location bar enter:

<https://unomaha.peopleadmin.com/hr/shibboleth>



5. Click next. →
6. In the title bar, name your short cut
7. Click finish.



Important Note: When a user is signed in and inactive for 60 minutes or more, PeopleAdmin will automatically sign the user out to ensure data security.

User Guides: Home Page Functions

When you sign into PeopleAdmin, you'll be directed to your dashboard. Here you'll find your access level, inbox and watch list, as well as links to your requisitions.

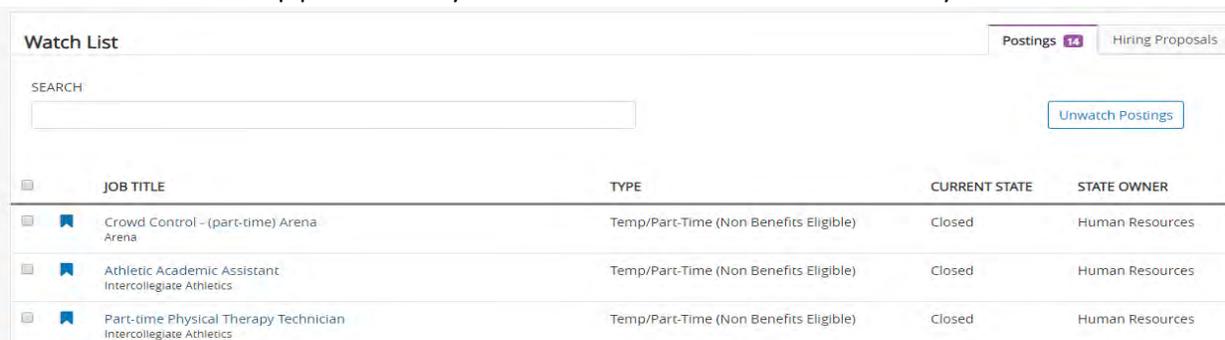
In the upper right hand corner of your dashboard page, you'll find a drop down menu labeled "user group". Typically, this will be set to "employee" when you first log in. Each group you belong to will appear on this list and will provide different access to the system, and different ways to interact with your open postings/requisitions. Initiator access allows a user to create requisitions. Department Head/Dean, Budget and Senior Vice Chancellor access allows the user to grant approval for a requisition. Search Committee Member access allows the user to view applications submitted to a particular position and Search Chair/Manager access allows the user to take action on those applications (such as requesting interviews and dispositioning candidates. See "Dispositioning Applicants" for more information). Choose the user group that grants the access needed for your task.



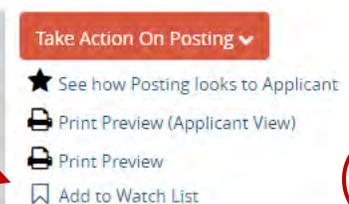
Your Inbox will keep you appraised of changes to your postings. It lists the title, current state and the number of days in that current state. Each time it changes states, the Inbox will update. If the posting is sent into a state that you cannot take action on, the posting will be removed from your Inbox (example: if the posting is moved to the Budget state in the work flow, it will not show in your Inbox). You can access postings listed in the Inbox by clicking on the title.



Your Watch List will keep positions on your dashboard no matter what state they are in.



To add a position to the Watch List, open the requisition and click on "add to watch list" in the right hand corner menu.



User Guides: Home Page Functions

The postings menu will allow you to access posting s requisitions in various classifications. Select the appropriate classification to get started.

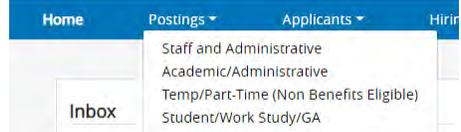


User Guides: Creating a Requisition

After you've determined you need to hire, and your job description has been reviewed and approved by compensation and budget, you will need to create a requisition.

Begin by choosing the correct classification for your requisition.

Staff and Administrative positions are full time managerial/professional, office/service employees, non-academic, administrative employees (B-1, B-2, C-2, N-1), or a part time employees who will be eligible for benefits. Staff positions are managed by Human Resources. All Staff positions must be approved by the Chancellor's Cabinet and some by the President's Office. Most are required to be posted internally for seven calendar days (5 business days), prior to accepting applications from external candidates. *Academic/Administrative* positions include Assistant Vice Chancellors and higher, and faculty positions (F-1, J-1, K-1, L-1, M-1, W-1, W-2). Academic Affairs manages all postings in this classification. *Temp/Part Time (non-benefits eligible)* positions (Y-1, Y-2, Z-2) last less than six months OR work 19.5 hours per week or less. These positions do not have to be approved by the Chancellor's Cabinet and are handled by Human Resources. *Student/Work Study/GA* positions are only for students currently enrolled in classes at a Nebraska University campus. They are traditionally 20 hours per week or less, and are managed in the Human Resources office by Student Employment. Click on the appropriate classification and then click "Create New Posting" in the right hand corner.



[+ Create New Posting](#)

Create New

What would you like to use to create this new posting?

Create from Position Type
Includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank.

Create from Posting
Uses an existing posting as a template and automatically copies in most information.

"Create from Position Type" will open an entirely new requisition with only HR written language loaded into some boxes. This option is best for a new position, or a position that has changed significantly. "Create from Posting" will allow you to copy a previous requisition and duplicate it. This is best for a position that has not changed, or has changed very little, since it was last posted.

You must enter information into all fields that have an orange asterisk next to them. *

Organizational Unit

Organization *

Division *

Departmental Unit *

The "organization" drop down menu will determine what is available for the "division" and "departmental unit" drop down menus.

When an application is submitted, it is added to the list indicated in the "applicant workflow" section. This should always be sent to "Staff Applicant Pool" unless discussed otherwise with HR.

Applicant Workflow

Workflow State

It should move to which state in the Candidate Process workflow?

User Guides: Creating a Requisition

References

Reference Notification ▼
Request References to submit Recommendations when candidate reaches selected workflow state?

Recommendation Workflow ▼
When all Recommendations have been provided, move to selected workflow state?

Recommendation Document Type Reference Letter ▼
Allow a document upload when a reference provider submits a Recommendation?

In the references section, you can set the system to request references for those who list email addresses. In the “Reference Notification” drop down menu, you can choose the work flow stage you’d like to request references (recommendation: set this to “interviewed”). The “Recommendation Workflow” drop down will allow you to choose what stage the application is forwarded to when the references are complete (recommendation: leave this blank). The “Recommendation Document Type” drop down will allow you to choose whether or not the reference can upload a reference letter document, or just provide the reference using the PeopleAdmin form.

Always leave this box marked, so that applicants can submit an application via the website. All applications must go through this website, and will not be accepted offline.

Online Applications

Accept online applications?

Special offline application instructions [Empty Text Area]

Title Code Please select ▼
This field is required.

Position Number [Empty Field]
This field is required.

Posting Number

Department Human Resources

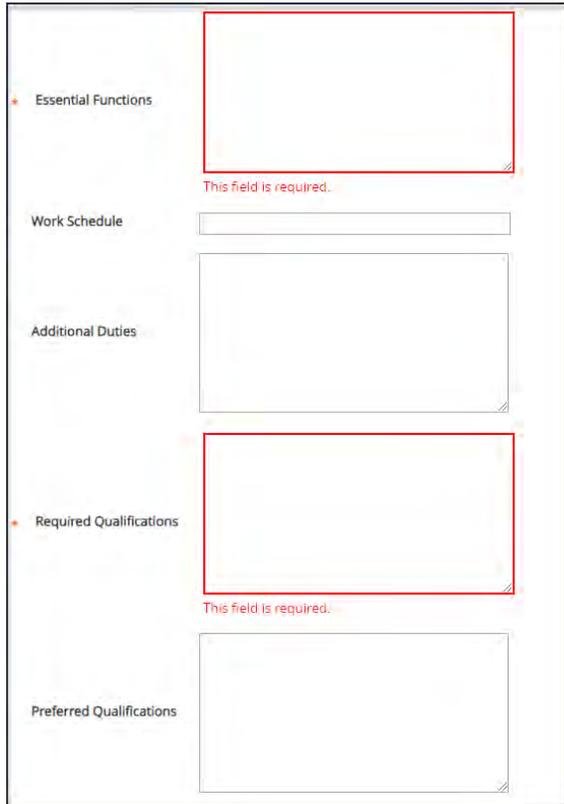
New or Existing Position
 New
 Existing

This field is required.

If existing, list the incumbent first/last name, position number, and vacancy date. [Empty Field]

The title code will be provided to you by Compensation (job code). The Position Number will be found on the Position Description for existing positions and will be provided to you by Budget for new positions.

User Guides: Creating a Requisition



The “Essential Functions” field should be copied from the “Position summary” on the position description. Some people like to add some language along the lines of “The Math Department is seeking a...” or “The Social Work Department is inviting applications for...”. Other language should not be added to this section.

Lists of duties beyond the essential functions can be listed in the “Additional Duties” section.

The “Required Qualifications” section is crucial. This should list the bare minimum qualifications a person will need to have to be successful in the position. Think about what is truly needed. If that means a Bachelor’s degree, list what field(s) the degree should be in. If the position could be successful with a combination of education and experience, or with experience equivalent to a degree, that should be listed. Often the clearest phrase is “a combination of education and relevant experience will be considered.” (NOTE: while screening applications,

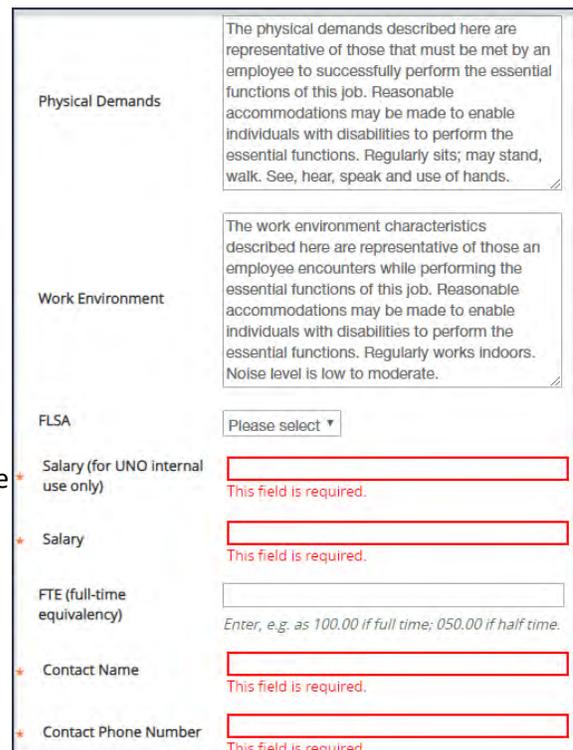
Human Resources staff will screen out any applicant who does not meet the qualifications outlined in this section).

The “Preferred Qualifications” section should include qualifications, education, experience, and certifications that will give a candidate an edge and aid them in the duties of the position, but that aren’t required.

The “Physical Demands” and “Work Environment” sections should not be changed unless discussed with Human Resources ahead of time.

The “FLSA” drop down menu will allow you to choose “exempt” or “non-exempt”. This classification is determined by Federal wage and hour standards and will be supplied for you in the email from the Compensation Team.

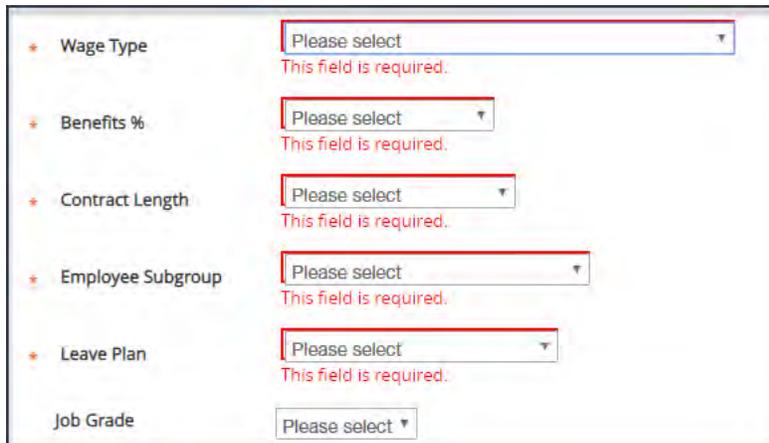
The email from the Compensation Team will also include the approved salary range for your position. Listing a



User Guides: Creating a Requisition

range in the “Salary” sections is always the best practice. You cannot offer an employee a salary higher or lower than the assigned range. Listing a range will give you room to determine a candidate’s pay based on their qualifications.

The “Contact Person” and phone number listed should be the Hiring Manager, who will be in charge of approving recruiting strategy and making final decisions on who to hire.

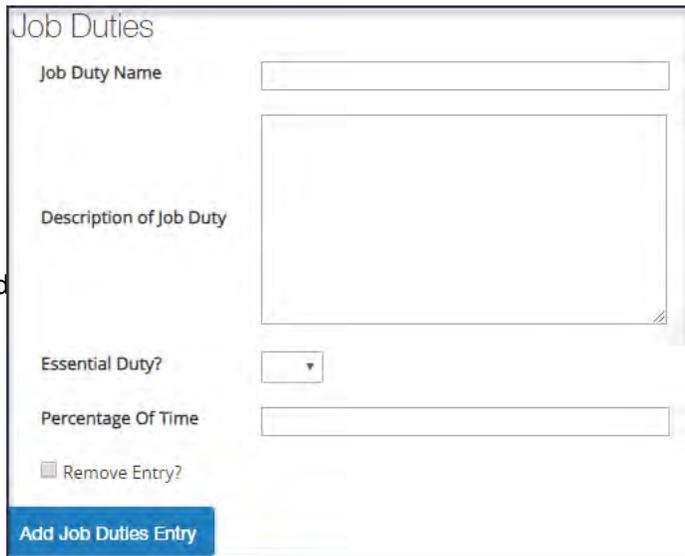


Fill out these section as is appropriate for the position being advertised.

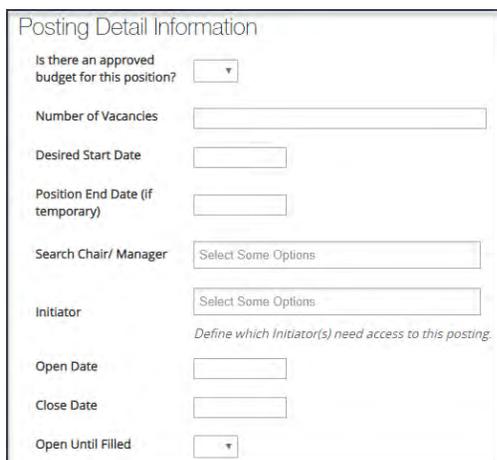
While not required, it is recommended to fill out the “Job Duties” section of the requisition, beginning by clicking the “Add Job Duties Entry” button.



To complete this section, each job duty should be copied from the “Duties & Responsibilities” section of the Position Description. The “Job Duty Name”, “Description of Job Duty”, “Essential Duty” designation and “Percentage Of Time” can all be found in this section and can be copied and pasted directly. Entries can be added for each job duty by clicking the “Add Job Duties Entry” for each. To remove a duty Click the “Remove Entry?” selection box and save your draft.



Adding this information to the requisition helps the applicant know exactly what the job entails.



You’ll notice that the information in the “Posting Detail Information” isn’t required to advance the posting forward in the system, however, this information must be included for accurate and effective search strategies to be formed. The only field that should be left blank is the “close date” If you put a date in this field, the position will be closed automatically by the system, whether a hire is made or not.

User Guides: Creating a Requisition

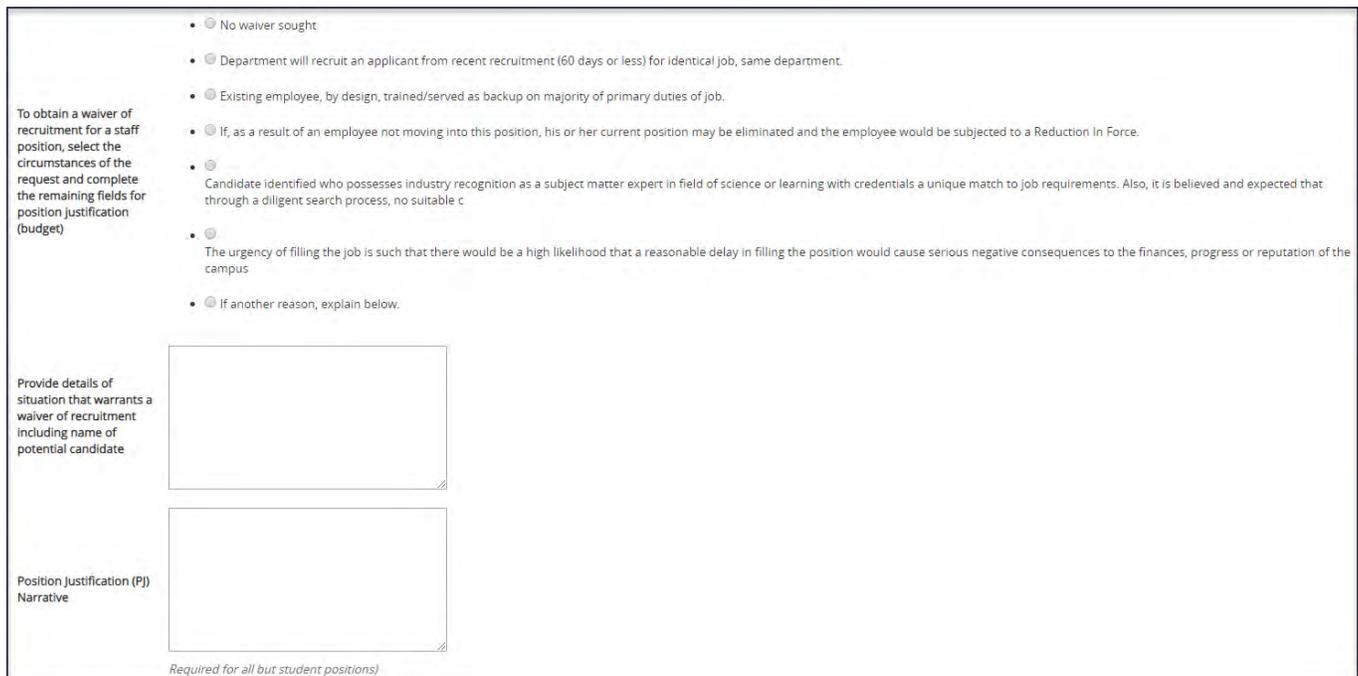


Cost Center for Advertisements

Where to Advertise

The “cost center for advertisements” tells Human Resources who to bill for whatever paid advertisements are chosen.

In the box labeled “Where to advertise”, you can list sources you’d like to tap into. Human Resources will also help strategize your advertisements.



To obtain a waiver of recruitment for a staff position, select the circumstances of the request and complete the remaining fields for position justification (budget)

- No waiver sought
- Department will recruit an applicant from recent recruitment (60 days or less) for identical job, same department.
- Existing employee, by design, trained/served as backup on majority of primary duties of job.
- If, as a result of an employee not moving into this position, his or her current position may be eliminated and the employee would be subjected to a Reduction In Force.
- Candidate identified who possesses industry recognition as a subject matter expert in field of science or learning with credentials a unique match to job requirements. Also, it is believed and expected that through a diligent search process, no suitable c
- The urgency of filling the job is such that there would be a high likelihood that a reasonable delay in filling the position would cause serious negative consequences to the finances, progress or reputation of the campus
- If another reason, explain below.

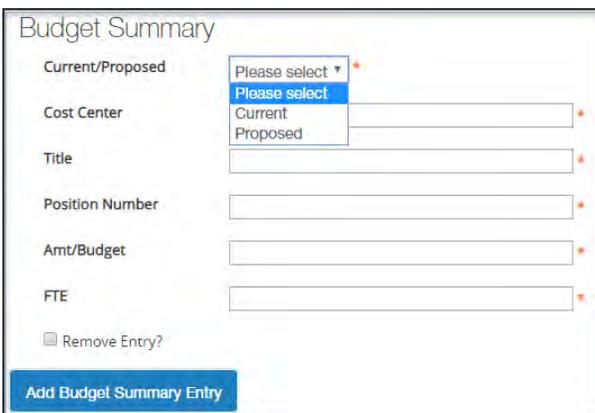
Provide details of situation that warrants a waiver of recruitment including name of potential candidate

Position Justification (PJ) Narrative

Required for all but student positions

For most positions, you’ll click the “no waiver sought” button. In rare situations, we may have a candidate in mind to fill a position, and not want to advertise. In that instance, you’ll choose the reason for requesting a waiver, and then fill out the following box. Your request will be reviewed by Human Resources and a decision made.

The Position Justification Narrative is required for all positions, and is evaluated by the Chancellor’s Cabinet to determine if the position will be approved for posting.



Budget Summary

Current/Proposed

Cost Center

Title

Position Number

Amt/Budget

FTE

Remove Entry?

Add Budget Summary Entry

The Budget Summary information breaks down the cost center, and the appointed budgeted for the position.

will be reviewed by the Budget department to ensure that the salary is supported.

[Check spelling](#)

References

Minimum Requests

Maximum Requests

Last Day a Reference Provider Can Submit Reference

Provider Special Instructions

These instructions will be included in the email to the reference provider.

Confirmation Message To Provider

This message will be included in the confirmation message the reference provider receives.

The References section will allow you to choose the minimum number of references an applicant can include and the maximum number to include (typically 4-6). It is often best to leave the “Last Day a Reference Provide Can Submit Reference” block blank. This will allow a reference provider to respond, even if it takes longer than you expect to fill a position. The “Provider Special Instructions” section should include questions for your reference providers to answer, or instructions to upload a letter of recommendation. A “Confirmation Message to Provider” message can be added so that when the reference is complete, you can

thank the provider automatically.

The Supplemental Questions section may contain questions to help you understand candidates better. These questions can also be used as screening criteria. To add a question, click the “Add a question” button.

Supplemental Questions

Save << Prev Next >>

Adding New Posting Questions: Click on the button labeled “Add a Question” A pop up section will appear where you can add an existing question or create a new one.

Adding Existing Posting Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Included Supplemental Questions Add a question

Position	Required	Category	Question	Status

Save << Prev Next >>

Add a Question

Available Supplemental Questions

Category: Keyword:

Add Category Question

- Uncategorized How did you hear about this employment opportunity?
- Education Do you have a bachelor's degree?
- Education What is the highest level of education attained?
- Experience How many years of experience do you have in this type of position?
- Education Do you have a masters degree?
- Education Will you have a Ph.D. in hand by the date of appointment or an advanced ABD by the date of the appointment?
- Uncategorized Are you available to work in the evening (6 pm to 10 pm)?
- Uncategorized Are you available to work weekends?
- Experience How many years of Administrative support experience do you have?
- Experience What is your Philosophy for serving students?
- Uncategorized Are you a current employee of the university?
- Experience Please select your primary discipline of research and instruction.
- Experience Please select your secondary discipline of research and instruction.
- Experience Please list your primary and secondary engineering skills.
- Experience How many years of experience do you have working in an office environment?

Displaying 1 - 15 of 438 in total

Previous Next

You can search the already existing questions by keyword, or you can add a new question, if you can't find the one you're looking for. Click the link, and then enter your question in the “name” section. Copy and paste that directly into the “Question” section. Change the “status” to “approved” and select the appropriate category.

Questions defined here will be “pending” approval and will not be available for use in other areas of the system until they have been approved.

Name

Status

Category

Question

Possible Answers

Open Ended Answers

Predefined Answers

Empty answers will be excluded. (Click and drag possible answers to reorder them.)

Possible Answer 1:

Possible Answer 2:

User Guides: Creating a Requisition

Choose whether you want the want an open ended answer or a multiple choice answer. Enter the answer choices and click submit.

Position	Required	Category	Question	Status
	<input type="checkbox"/>	Education	What is the highest level of education attained? Possible Answers: Pricedefined Options	active
	<input type="checkbox"/>		1. GED	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/>		2. High School Diploma	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/>		3. Associates Degree	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/>		4. Bachelors Degree	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/>		5. Masters Degree	<input type="checkbox"/> <input type="checkbox"/>
	<input type="checkbox"/>		6. PHD	<input type="checkbox"/> <input type="checkbox"/>

To edit the properties of each question, click on the question itself. You can then make the question required, determine what order the questions should appear in, and determine answers will disqualify a candidate.

SKIP the “Qualification Equivalencies” section.

When choosing “Documents Needed to Apply” anything marked “not used” will not be able to be uploaded. If documents are recommended but not required, mark them optional. If a document is marked “required” a candidate will not be able to submit the application Without uploading the required document.

Order	Name	Not Used	Optional	Required
1	Resume	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Cover Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Transcripts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Letter of Recommendation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Curriculum Vitae	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Media File	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Portfolio	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save or Cancel

SKIP the “Posting Documents” and “Guest User” sections.

Search Committee Members

No Search Committee Members have been assigned to this Posting yet.

[Add Existing User](#) [Create New User Account](#)

In the “Search Committee” section, you will choose to “add existing user” or “Create new user account”.

Click on the “add existing user” button, and begin to search for users by their last name, and then first name. When the person you’re looking for is found, click “add member”. If the person you’re looking for can’t be found, click “Create new user account”.

Add Existing User

Search:

Department:

Display search committee user group members only

Last Name	First Name	Email	Department	Committee Chair	(Actions)
Radel	Rachel	R1adel@unomaha.edu	University of Nebraska Omaha	<input type="checkbox"/>	Add Member

Displaying 1 User

[Create New User Account](#) [Close](#)

Enter the person’s first and last name and email address. The user name will be the first part of their email address (before the @). Click “Add member to search committee”. This will send an approval request to Human Resources for the member to be given permission to serve on the committee.

New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.

Required fields are indicated with an asterisk (*):

Account Information

Please enter the following information to create an account for a new Search Committee Member:

- * First Name
- * Last Name
- * Email
- * Username

Make this user committee chair

[Add Member to Search Committee](#) [Close](#)

SKIP “Evaluative Criteria”. Click on the Summary tab.

On the Summary Page, you’ll be able to review your posting and ensure everything is correct. You can edit from this page, in this stage, if you need to. When the posting is exactly how you want it, click the “Take Action on Posting” button. From there, you can cancel the posting, or move it on to the Department Head for approval.

Take Action On Posting

[Keep working on this Posting](#)

WORKFLOW ACTIONS

[Cancel \(move to Canceled\)](#)

[Select \(move to Initiator\)](#)

[Select \(move to Department Head\)](#)



User Guides: Creating a Requisition



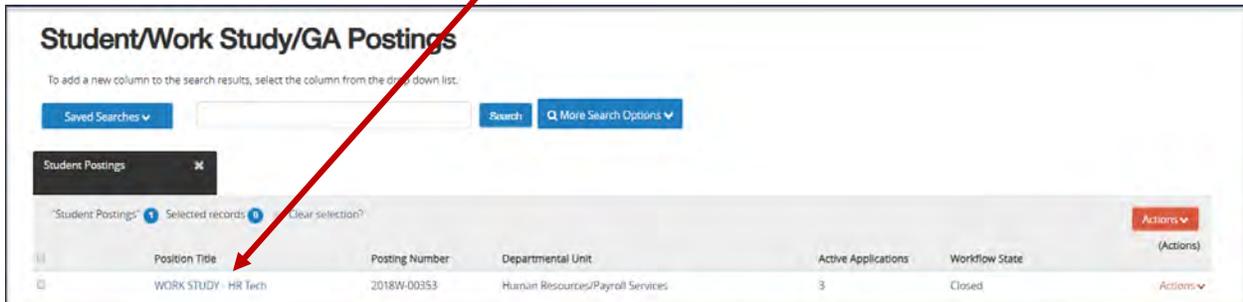
The Department Head (or Dean) will review the requisition and when it's approved, will move it forward to the Budget stage of the workflow. The Budget team will review it and, once approved, move it forward to the Senior Vice Chancellor stage in the workflow. Once there, it is reviewed by the Chancellor's Cabinet and, if applicable, the President. Once all approvals are completed, the requisition is sent forward to Human Resources for posting.

User Guides: Viewing Applicants

When applications are submitted, you'll need to review them to determine who are the most qualified. To view applicants, make sure you are in Search Chair/Manager or Search Committee Member mode.

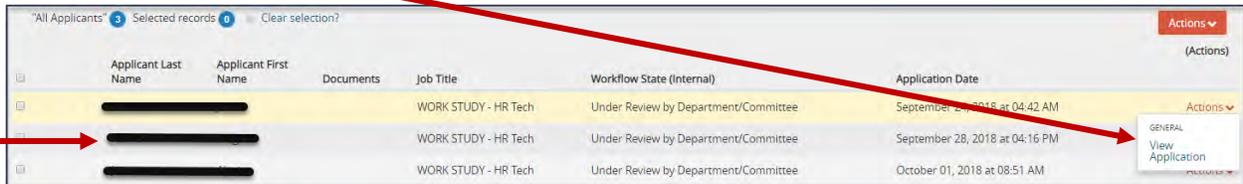
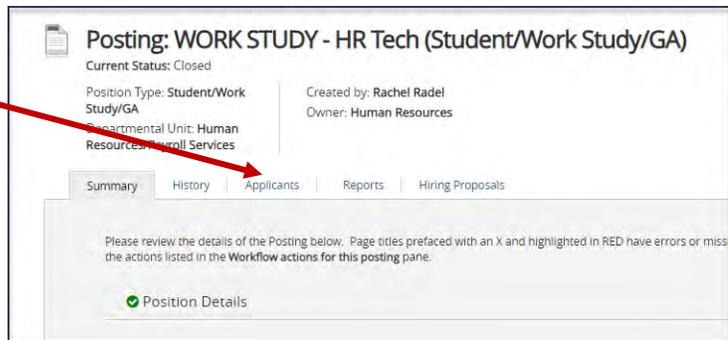


Choose the position classification you are working in and then click the title of the position you are reviewing.



Click on the "Applicants" tab.

In the applicants menu, you can review each application by either clicking on the applicant's name, or clicking "View Application" in the actions menu on each line.



The header will give you contact information for the applicant. The "summary" tab will contain all of the application data collected. "Documents" will hold resumes, transcripts and other documents requested. "Recommendations" will hold any reference letters submitted.



User Guides: Advancing and Dispositioning Applicants

While reviewing applicants, you'll want to advance applicants to the next step, or disposition them, letting them know that they will not be considered for the position. The options for each applicant will depend on the workflow stage they are currently in.

Current Status: Under Review by Department/Committee
Application form: Application

While applicants are in the "Under Review by Department/Committee stage, you'll have the option to select "Request Interview" or "Not Interviewed, Not Hired."

Take Action On Job Application ▾

Keep working on this Job application

WORKFLOW ACTIONS

Select (move to Request for Interview)

Select (move to Not Interviewed, Not Hired)

Once an interview is requested, an email will be sent to the Equity, Access and Diversity Coordinator, who will review and approve your pool. The approval will generate an email to you, and advance the candidate to the "approved for interview" workflow state. After the interview is over you'll have the option to move your candidate to "Interviewed".

From the "Interviewed" state, you'll have three options. You should not advance your applicant further until a decision has been made. For the applicant you intend to hire (*after* your interview summary has been approved), select "Approve for Hire pending BG Check Results". All others will be moved to "Interviewed, Not Hired" once your offer has been accepted. Although it is an option, you should not use "Offer Rescinded" without consulting Human Resources first.

Take Action On Job Application ▾

Keep working on this Job application

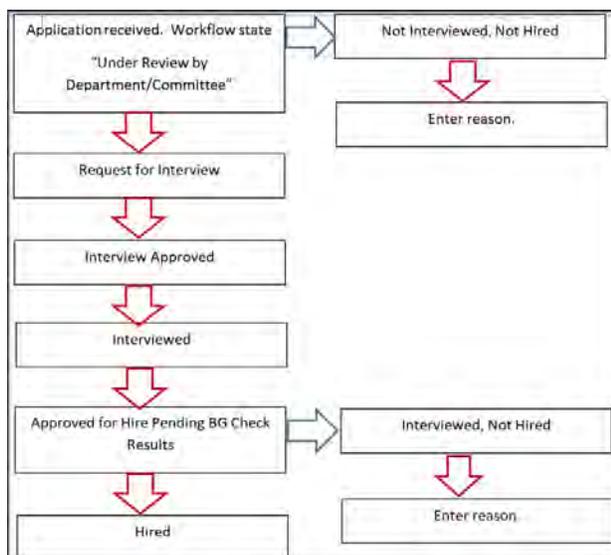
WORKFLOW ACTIONS

Select (move to Approve for Hire (Pending BG Check Results))

Select (move to Interviewed, Not Hired)

Select (move to Offer Rescinded)

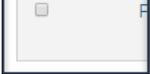
After your candidate starts work, you'll find an option to "move to Hired", for the applicant in the "Approve for Hire" state. Move your applicant to Hired, and notify Human Resources that all applicants have been dispositioned.



Each time you choose not to advance a candidate, you'll be asked to enter the reason why. This helps us keep track of the decision making process and helps us give feedback to applicants who call with questions.

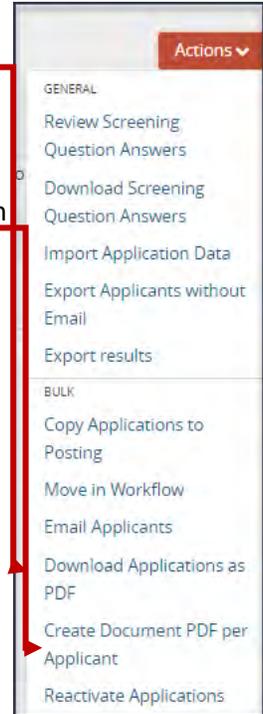
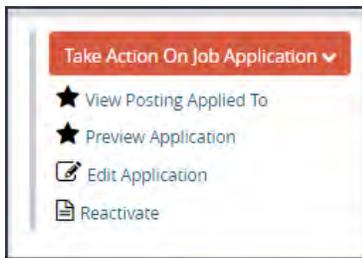
User Guides: Downloading and Printing Applications

There may be times when you need to download or print an application. There are several options for this.

- 1)  If you need to download multiple applications, you can click on the selection boxes to the left of each applicant's name. Then click on the "Actions" button on the right hand side. Under the bulk menu choose "Download applications as PDF". This will create one document with all selected applications.
- 2)  You can also select the boxes on the left of each applicant's name, click on the actions button and choose "Create document PDF per applicant". This will create a separate document for each application.

You can then print these applications from the PDF document created.

You can also print an application by opening the application itself. In the right hand corner, click on the "Preview application" link. A plain text window will open, and can be printed from the web browser.



PeopleAdmin can collect references for you. You can set it to work through this process automatically, or you can begin the process manually when you're ready.

While creating the requisition, the first page has a References Section.

References

Reference Notification ▼
Request References to submit Recommendations when candidate reaches selected workflow state?

Recommendation Workflow ▼
When all Recommendations have been provided, move to selected workflow state?

Recommendation Document Type Reference Letter ▼
Allow a document upload when a reference provider submits a Recommendation?

In the references section, you can set the system to request references for those who list email addresses. In the "Reference Notification" drop down menu, you can choose the work flow stage you'd like to request references (recommendation: set this to "interviewed"). The "Recommendation Workflow" drop down will allow you to choose what stage the application is forwarded to when the references are complete (recommendation: leave this blank). The "Recommendation Document Type" drop down will allow you to choose whether or not the reference can upload a reference letter document, or just provide the reference using the PeopleAdmin form.

If you don't set this up in the requisition, you can still have PeopleAdmin check references. Open the application by clicking on the applicant's name. Under the applicant information header, there are five tabs. Click on the "recommendations" tab.



Name	Email	Notified?	Responded?	
██████████	██████████	No	No	Send
██████████	██████████	No	No	Send
██████████	██████████	No	No	Send

Recommendations
No recommendations have been submitted for this application.

To send a notification, click the "send" button next to each name. When the system has sent an email, the "notified?" column will turn to "yes". When a response is received the "responded?" column will become the date and time received, and a link to that reference will appear below.

Here is an example of the recommendations section properly used. You can see two notifications were sent, and one reference was received back.

Reference Requests				
Name	Email	Notified?	Responded?	
[Redacted]	[Redacted]	10/30/2018 05:25 AM	11/01/2018 01:09 AM	Resend
[Redacted]	[Redacted]	No	No	Send
[Redacted]	[Redacted]	10/30/2018 05:25 AM	No	Resend

Recommendations		
Reference	Finalized?	(Actions)
[Redacted] 11/01/2018 01:23 AM	Yes	Actions

Recommendation Form

Applicant Information

First Name: [Redacted]
Last Name: [Redacted]

Reference Information

Name: [Redacted]
Email: [Redacted]
Phone Number: [Redacted]
Employer: [Redacted]
Job Title: [Redacted]

Recommendation

How Do You Know This Candidate? I was [Redacted] direct line manager from 2009 -2017. I have known him socially since 2002 as a colleague with [Redacted]

How Long Have You Known This Candidate? Since August 2009 (professionally). Since 2002 (informally)

Additional Comments I have recently moved to a new position in quality assurance. Prior to this I was [Redacted] direct line manager in my capacity as Program Chair for Computer Information Science Programs from 2009 - 2017

Attached Documents

Attached Reference Letter: [Reference Letter 11-01-18 01:09:16](#)

Clicking on the reference link leads to this form. Reference providers also have the option to upload a letter of recommendation, which can be accessed from this link.

User Guides: Bulk Transitioning of Applicants

At times, we need to transition a large number of candidates through the work flow at one time.

Open your list of applicants. Depending on where you are in the recruiting process, you may see applicants in different states. Their work flow state may say “Under review by department/committee”, “Interview approved”, “interviewed”, “interviewed, not hired” or “not interviewed, not hired”. To bulk transition a group of applicants, they must all be in the same work flow state.

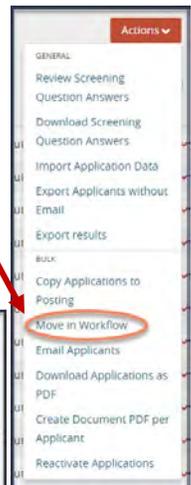
<input type="checkbox"/>	[REDACTED]	Resume, Cover Letter	2018-00253	Under Review by Department/Committee	October 01, 2018 at 12:39 PM	Sr. Admissions Representative, Diversity and Community Outreach	Actions ▾
<input type="checkbox"/>	[REDACTED]	Resume, Cover Letter	2018-00253	Under Review by Department/Committee	August 17, 2018 at 08:34 PM	Sr. Admissions Representative, Diversity and Community Outreach	Actions ▾
<input type="checkbox"/>	[REDACTED]	Resume, Cover Letter	2018-00253	Interview Approved	August 17, 2018 at 01:43 PM	Sr. Admissions Representative, Diversity and Community Outreach	Actions ▾
<input type="checkbox"/>	[REDACTED]	Resume, Cover Letter	2018-00253	Under Review by Department/Committee	August 26, 2018 at 01:55 PM	Sr. Admissions Representative, Diversity and Community Outreach	Actions ▾
<input type="checkbox"/>	[REDACTED]	Resume, Transcripts, Cover Letter	2018-00253	Under Review by Department/Committee	October 04, 2018 at 06:28 PM	Sr. Admissions Representative, Diversity and Community Outreach	Actions ▾

For example, in the group of applicants above, all of those marked “under review by department/committee”, can be selected for transition together. The application marked “Interview approved” will have to be opened and transitioned separately.

To begin the transition, click on the selection boxes to the left of each application you intend to transition. Click on the “Actions” button on the right side, and choose “Move in workflow” under the “bulk” menu.



Your action screen will look like this:



Change for all applicants		Not Interviewed, Not Hired		Other Explanation: enter reason here	
Applicant	Current State	New State	Reason	Group Prompt User	
[REDACTED]	Under Review by Department/Committee	Not Interviewed, Not Hired	Other Explanation: enter reason here		
[REDACTED]	Under Review by Department/Committee	Not Interviewed, Not Hired	Other Explanation: enter reason here		
[REDACTED]	Under Review by Department/Committee	Not Interviewed, Not Hired	Other Explanation: enter reason here		

Save changes Cancel

On this screen, you only need to edit the very top fields. The drop down menu marked “Change for All applicants” will affect all of the applicants below, as will the “reason” drop down and the “explanation” text field. Click “save changes” for the transition to take effect.