



## **Applicant Tracking System's Training Additional Viewer Guide**

**(For chairpersons, department heads, directors and Faculty Excellence Advocates)**

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## **ADDITIONAL VIEWER OVERVIEW**

The Applicant Tracking System, PageUp, provides a set of tools for managing job postings and applicant information. In addition offers can be initiated and tracked, employee onboarding can be managed, and interviews and other events may be scheduled all in one location during and after the hiring process. The system provides oversight into the numerous organizational units in each area, and empowers teams to organize and monitor a large volume of postings and applicants.

Individuals who need to view applicants and their application materials can be listed on a posting as an Additional Viewer. These individuals may include chairpersons, department heads, directors and Faculty Excellence Advocates (FEAs). Additional Viewers have the following capabilities when listed on a posting:

- View the posting status (i.e., approved, interview stage, etc.)
- View the Primary Staffing Coordinator
- View applicants and their current application status
- View application materials
- Compile application documents into a single PDF
- Add notes to the posting

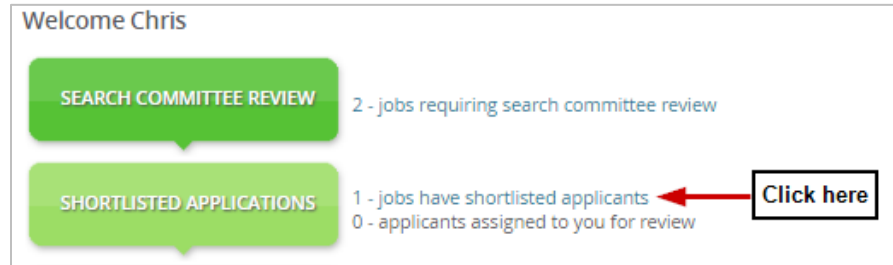
For questions pertaining to the Job Card, or to view historical postings and applicant status, contact the Primary Staffing Coordinator on the posting or Dean/Vice President/Delegate.

## SHORTLISTED APPLICATIONS

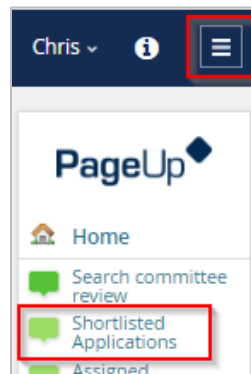
### Accessing Postings and Applicants

When a user has been added as an Additional Viewer to the Job Card and applicants are under department review, a notification will appear on their dashboard in the **Shortlisted Applications** bubble.

1. Click on the **jobs have shortlisted applicants** link to access the postings and applicants.



**Note:** The user also has the option to access the posting and applications via the *Main Menu*, by clicking on **Shortlisted Applications**. The Main Menu is accessible on the upper right corner of every screen and can provide a quick access back to the Shortlisted Applications page without navigating back to the Dashboard. To open the Main Menu, click on the icon that looks like three lines.



2. The *Applicant List* screen opens and displays all postings for which the user is an Additional Viewer.
  - a) To sort the postings by column, click on the column title.
  - b) Click the **View shortlisted applicants** link to access the applicants for that posting.

Applicant list					
Date added	Requisition Number	Classification title	Status	Staffing Coordinator	
3 Feb 2017	493508	Biomedical Engineer	Dept. Review	Emma Shreveport	<a href="#">View shortlisted applicants (5)</a>
11 Oct 2016	492253	Accountant I	Hiring Recommendation	Dana Grimm	<a href="#">View shortlisted applicants (10)</a>

- c) The *Applicant List* grid will display all applicants for this job posting.

Select	Applicant name	Flags	Current application status	Outcome	Reviewed	
<input type="checkbox"/>	Rajamir Patel		Interview not selected - more qualified candidate selected - education and experience	- Interview not selected	✓	View   Status history
<input type="checkbox"/>	Charles Tredway		Interview 1 completed		✗	View   Status history
<input type="checkbox"/>	Judy Graham		Interview 1 completed		✗	View   Status history

The Applicant List also displays the following information for each applicant:

- a) Application Flags
  - i. See the [Flags tip sheet](#) for more information about flags.
- b) Current application status
  - i. Click on the title of this column to sort the applicant list by application status.
- c) Outcome
  - ii. If an applicant has been disqualified from the process, withdrawn themselves or declined an offer, the reason provided will appear in the Outcome column.
- d) Reviewed indicator
  - iii. The reviewed indicator will automatically change from ✗ to ✓ once the user has clicked the **View** link located on the right side of the screen. However, this indicator can also be manually changed to ✓ or back to ✗ by clicking directly on the icon.
- e) Link to **View** application
- f) Link to view applicant's **Status history**

Status history	
Date	Application status
17 Feb 2017	Interview not selected - more qualified candidate selected - education and experience
16 Feb 2017	Application received

### Viewing Individual Applications

1. To view the application for a particular applicant:
  - a) Click on the applicant's name
  - OR
  - b) Click on the **View** link located on the right side of the page

Select	Applicant name	Flags	Current application status	Outcome	Reviewed	
<input type="checkbox"/>	Percy Jameson		Interview - accepted by applicant		✓	View   Status history
<input type="checkbox"/>	Charles Tredway		Interview 1 completed		✗	View   Status history
<input type="checkbox"/>	Judy Graham		Interview 1 completed		✗	View   Status history
<input type="checkbox"/>	Rajamir Patel		Interview not selected - more qualified candidate selected - education and experience	- Interview not selected	✓	View   Status history

2. A new window will open with the applicant's name listed at the top. Scroll through the page to view:
  - a) Applicant profile information
  - b) Application

**Note:**

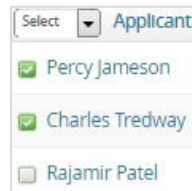
- i. The application will include links to documents uploaded as part of the application process. Click on the link to download and open the documents individually.
- ii. Reference letters that have been submitted by the referee or uploaded by the Staffing Coordinator will not appear on this page. To view reference letters, use the Bulk PDF function. See [Compiling Application Materials](#) to learn more about **Bulk PDF**.

### Compiling Application Materials

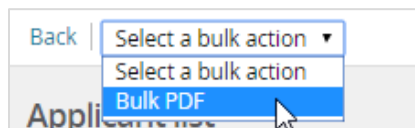
To compile the application materials of one or more applicants into an organized PDF, use the Bulk PDF function. The following documents will be automatically included in the PDF where available:

- Application form
- Resume/CV
- Cover letter
- Additional application documents
- Reference letters
- Offer contracts

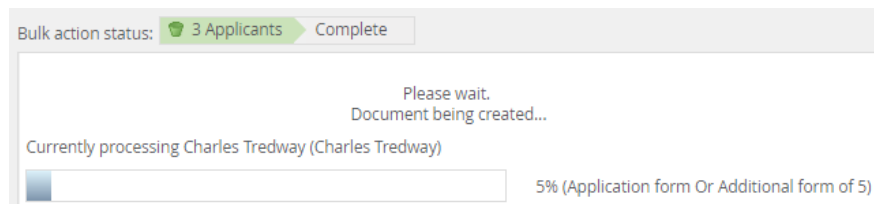
1. Select all applicants to include in the PDF by checking the box next to the applicant's name.



2. At the top of the page, select **Bulk PDF** from the *Select a bulk action* drop-down menu

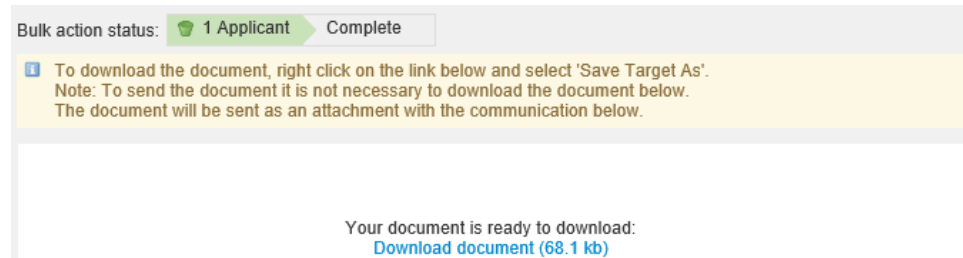


3. The following screen will appear while the PDF is being generated.




4. Once complete, download the PDF or send to others for review.
  - a) To download the PDF:

- i. Click the **Download Document** link to open the PDF or right-click on the link to save in a folder.
- ii. Click **Cancel** at the bottom of the page to return to the applicant list.



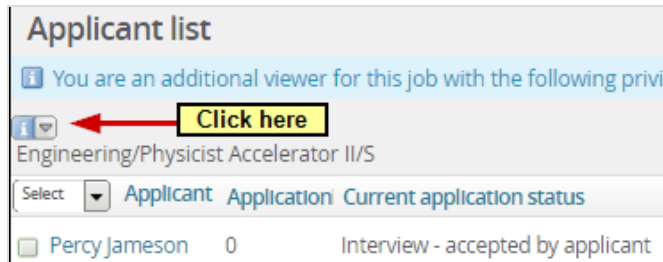
- b) To send PDF to others for review:
  - i. Select a user to send the email to by clicking on the binoculars icon or enter the user's email in the *Other e-mail* field.
  - ii. Edit the subject and body of the email as necessary.
  - iii. Click **Okay** to send the email to the user.

### Adding Notes to the Job Card

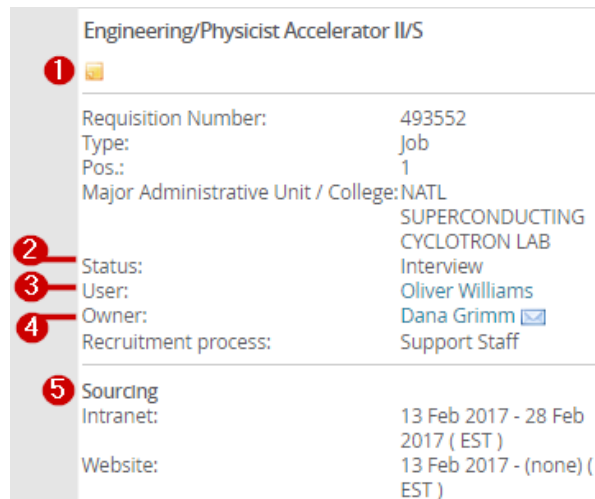
 Notes are visible to all users in the system. Please use discretion as these notes will become part of the permanent hiring record.

To add a note to the Job Card or posting:

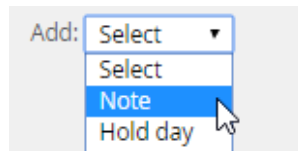
1. On the *Applicant list* page, click on the i-button located just above the applicant grid.



2. An information panel will open, containing:
  - a) Button to add notes to the Job Card
  - b) Job Status
  - c) Primary Staffing Coordinator (User)
  - d) HR Analyst (Owner)
  - e) Sourcing (when and where the posting has been advertised)



3. Click on the button to add a note to the Job Card.
4. A new window will open. Select **Note** from the drop-down menu.



5. Enter the necessary information into the *Note* field.
6. Add attachments using the **Upload file** and **Dropbox** buttons.
7. Email the note to someone else if necessary.  
**Note:** To email the Primary Staffing Coordinator of the posting, enter the **User** listed on the information panel of the job.



8. Click **Save**. The note (and file, if added) will display on the *Notes* screen for all users to view.

### Add note

Note:\*



After reviewing the applicant list, I would recommend we phone screen the following applicants to learn more about their education and experience.

- Percy Jameson
- Charles Treadway
- Judy Graham

File:

E-mail this note

to:

User:   

Other e-mail: