

# APPLICANT TRACKING SYSTEM TIPS

## Bulk Actions

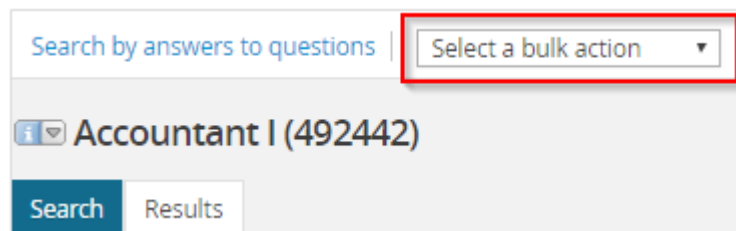
The Bulk Action function makes it easy to perform an action on one or more applicants at once, such as:

- Status updates
- Compiling documents
- Communication

To perform a bulk action, group applicants using the colored checkboxes to the left of their names. Color categories are temporary and will clear if you navigate away from or refresh the screen. There are no set meanings for color categories; you may assign them as you see fit.



Check the appropriate boxes and use the *Select a bulk action* drop-down menu to select an action. Once the bulk action is selected, a new window will open with instructions for that specific task.



The system allows action to be taken on applicants starting first with the green category, then yellow, then red. The bar at the top shows the color group being worked with.



**Note:** The attachment limit for MSU Campus Exchange is 100 MB. Please be aware, users may have limitations on the size of attachments that may be shared.



The following details give descriptions on the different bulk actions and how they function:

## **Bulk Assign**

Used to assign applications to any user in the system for review. This may be used when seeking feedback about an applicant from another user. Assigned users will be sent an email notification and receive a notification in the Applications button on their dashboard. The assigned user can review the Application with the option to approve or decline the applicant. Approving or declining the applicant has no effect on the applicant status or progress, but is for informational purposes only. The assignee can view the feedback (approved or declined) under history on the Applicant Card. Only one user can be assigned to the Application at a time. Assigning an application to another user will cancel the previous assignment.

## **Bulk Communicate**

Used for communicating with applicants. Choose from the available templates and edit as necessary, or start from scratch. This function provides the option to set up delayed emails, but be careful as these cannot be cancelled once scheduled.

## **Bulk Compile and Send\***

Used to compile documents of selected applicants into a single PDF. Choose what to pull into the PDF by selecting checkboxes next to relevant information. Once the PDF is generated, download the PDF or email the compiled documents to another user in the system.

\*Bulk Compile and Send is the recommended bulk action to use when compiling applicant documents.

## **Bulk Move\***

Used to change the application status of multiple applicants all at once.

Note: Send emails to applicants if appropriate, but avoid sending emails to users as part of the bulk move action.

Otherwise, they will receive an email for every applicant moved into this status. To send an email to users, use Bulk Move and Send, as it will eliminate duplicate emails.

\*Bulk Move is the recommended bulk action to use when changing applicant statuses.

## **Bulk Move and Send\***

Used to change the application status of multiple applicants all at once and send application materials to another user in a single email. This bulk action may be beneficial if other users need to be notified of the status change, but should not receive an email for each applicant.

\*Bulk Move and Send is the recommended bulk action to use when sending an email to another user and changing applicant statuses.

## **Bulk Reference Check**

Instead of using an Application status to trigger reference letter checks, there is the option to bulk reference letter check. This provides the option to select the appropriate reference check form and modify the email that will be sent to the referee accordingly. The ability to modify the email is one benefit of using bulk reference check over using Application status.

## **Bulk Send\***

Used to send application materials to another user as separate attachments. For example, if two applicants are selected and the resume/CV and cover letter are identified as appropriate attachments, the user will receive four individual attachments. For most purposes, bulk compile and send is a much better way to send materials as it compiles all the documents into one attachment.

\*Bulk Send is the recommended bulk action to use when sending an email to another user.

