

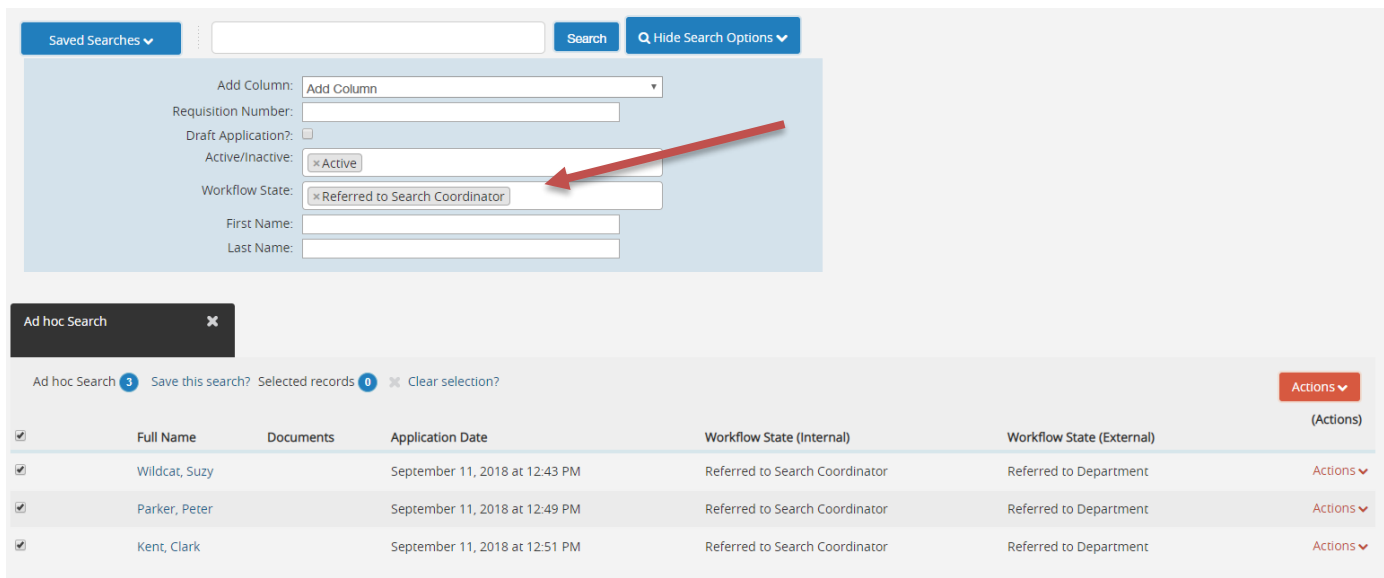
Quick Guide for Bulk Move Applicants in Workflow

IES has a useful functionality that enables you to complete your dispositions for multiple applicants in a few quick steps. The bulk 'Move in Workflow' feature achieves a task that could take several minutes in a minute or less.

Checklist for Moving Applicants in Workflow:

- 1. Log into the system and select Search Coordinator role on the applicant tracking side ([Hire](#)) of the system.
- 2. Locate the posting you would like to view and click on the Job Title
- 3. Click "[Applicants](#)" to obtain the list of individuals who have applied
- 4. Click on the "[More Search Options](#)" to show the filters. Then type in the workflow state of the applicants you wish to dispose in the "[Workflow State](#)" field and click search.

*all applicants shown **MUST** be in the same workflow state to use this functionality*



The screenshot shows the search interface with the following filters:

- Requisition Number: [Empty]
- Draft Application?:
- Active/Inactive:
- Workflow State: (indicated by a red arrow)
- First Name: [Empty]
- Last Name: [Empty]

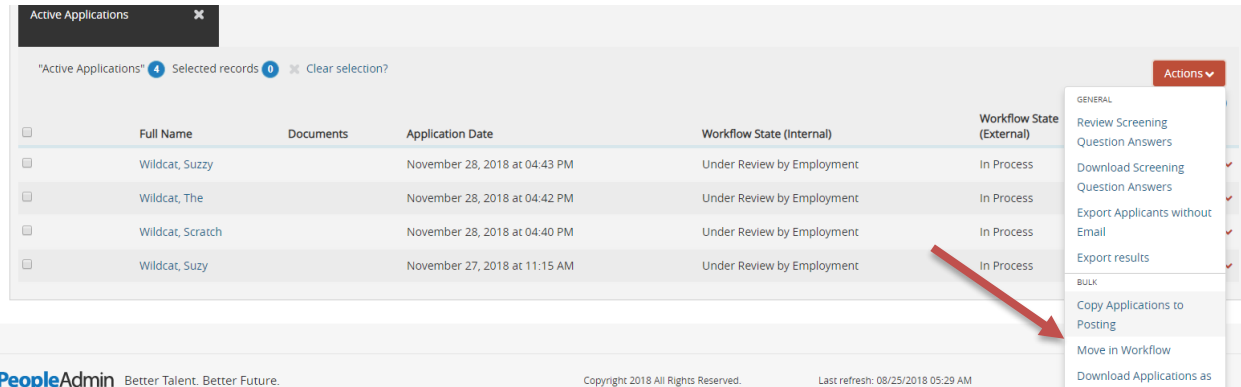
Below the filters is an "Ad hoc Search" window showing a table of results:

Full Name	Documents	Application Date	Workflow State (Internal)	Workflow State (External)	(Actions)
Wildcat, Suzy		September 11, 2018 at 12:43 PM	Referred to Search Coordinator	Referred to Department	Actions
Parker, Peter		September 11, 2018 at 12:49 PM	Referred to Search Coordinator	Referred to Department	Actions
Kent, Clark		September 11, 2018 at 12:51 PM	Referred to Search Coordinator	Referred to Department	Actions

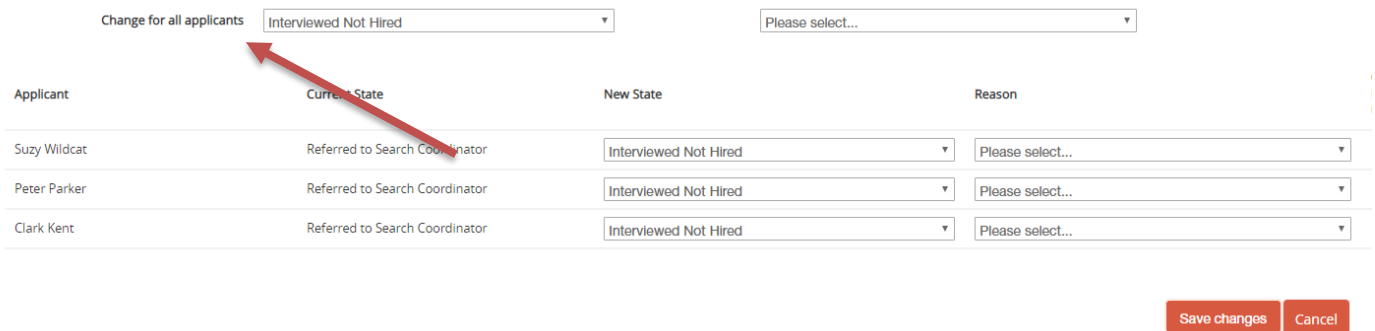
- 5. Select all the applicants you wish to dispose in one batch.

- 6. Hover over the orange **“Actions”** bottom on the top right corner of the list of applicants and select **“move in workflow”**

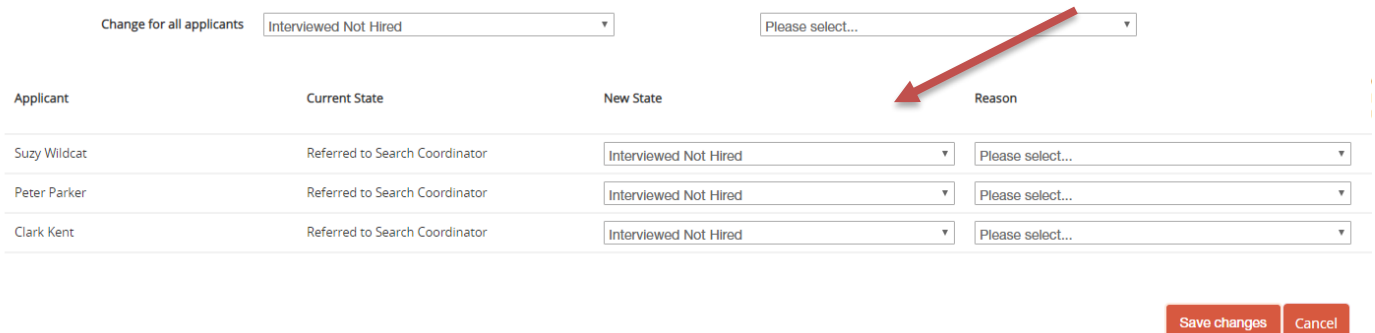
If you don't see this option, it means that there is **more than one** workflow state shown for the applicants (Refer to step # 4).



- 7. You will need to start by changing all applicants in bulk to the same workflow **“State”** and **“Reason”**. Click on the dropdown box beside the field labeled **“change for all applicants”** at the top of the page and select the workflow state you wish to move them to. This will update the workflow state for the selected applicants and a second dropdown box will appear and you will select the reason.



- 8. If you need to change individual applicants to a different State or Reason, select the disposition state and reason for the applicant in the dropdown boxes next to their name at this time.



- 9. After confirming that all applicants have been moved to the desired workflow state and a disposition reason has been selected, click **“save changes”** at the bottom of the page.
- 10. Repeat for any additional workflow states.