

Managing Academic Applications



Reference Guide

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**UNIVERSITY OF
CALGARY**

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Introduction

This reference guide contains information that will help you make use of the Manage Applicant features in PeopleSoft.

The ability to manage job applicants is available to Reports to Managers and those administrators who have obtained the *Faculty/Unit Recruitment Administrator* role via a PeopleSoft access request. In addition to having the appropriate role, you must also be added as a hiring manager on a job to be able to view the job and the applicants associated to it. Once a job has been posted, all applicants can be reviewed and managed from a single location.

This guide will take you through the following functions within the Manage Applicants module in PeopleSoft:

- Navigating the Manage Applicants menu
- Viewing resume/CV and application information
- Updating an applicant’s status
- Emailing applications to search committee members
- Emailing candidates

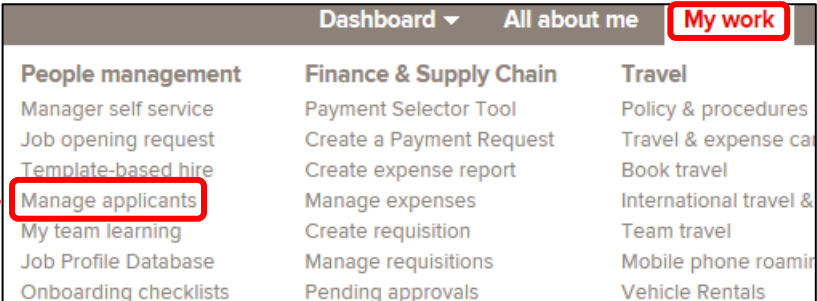
If you require assistance with the Manage Applicant functions, contact your [Academic Advisor, Talent Acquisition](#) for assistance.

Navigating Manage Applicants in PeopleSoft

Topic 1: Access Manage Applicants Menu

1. From the myUofC portal, click **My work**.
2. Under the **People management** header, click **Manage applicants**.

The **Browse Job Openings** screen is displayed.



The screenshot shows a navigation menu with three main sections: People management, Finance & Supply Chain, and Travel. The 'My work' link in the top right is highlighted with a red box and labeled '1.'. Under the 'People management' section, the 'Manage applicants' link is highlighted with a red box and labeled '2.'. Other links in the 'People management' section include Manager self service, Job opening request, Template-based hire, My team learning, Job Profile Database, and Onboarding checklists. The 'Finance & Supply Chain' section includes Payment Selector Tool, Create a Payment Request, Create expense report, Manage expenses, Create requisition, Manage requisitions, and Pending approvals. The 'Travel' section includes Policy & procedures, Travel & expense ca, Book travel, International travel &, Team travel, Mobile phone roamir, and Vehicle Rentals.

People management	Finance & Supply Chain	Travel
Manager self service	Payment Selector Tool	Policy & procedures
Job opening request	Create a Payment Request	Travel & expense ca
Template-based hire	Create expense report	Book travel
2. Manage applicants	Manage expenses	International travel &
My team learning	Create requisition	Team travel
Job Profile Database	Manage requisitions	Mobile phone roamir
Onboarding checklists	Pending approvals	Vehicle Rentals

Topic 2: Browse Job Openings

The Browse Job Openings screen displays a list of all job openings, past and present, for which you have been listed as a contact. Depending on how often you are involved in the hiring process, the number of postings listed will vary.

All jobs are displayed in the Job Openings window.

There are a number of options available to you on this screen, allowing you to personalize content and easily find the information you are looking for.

Job Openings									
Job ID	Posting Title	Category	Recruiting Location	Department	Business Unit	Days Open	Status	No Action Taken	Total Applicants
13754	Sessional Faculty Position, Fa...	<input type="checkbox"/>	Foothills Campus	Dean's Office - Vet Medicine	UCALG - Operating	69	010 Open	5	4
13622	Sessional Instructor, Anatomic...	<input type="checkbox"/>	Foothills Campus	Dean's Office - Vet Medicine	UCALG - Operating	89	010 Open	4	3
13040	Assistant or Associate Profess...	<input type="checkbox"/>	Foothills Campus	Dean's Office - Vet Medicine	UCALG - Operating	160	010 Open	31	37
12491	Assistant or Associate Profess...	<input type="checkbox"/>	Foothills Campus	Dean's Office - Vet Medicine	UCALG - Operating	223	010 Open	14	14
12204	Assistant Professor, Wildlife ...	<input type="checkbox"/>	Foothills Campus	Dean's Office - Vet Medicine	UCALG - Operating	258	010 Open	30	29

You are able to filter the results using the options along the left side of the page.

Filter options include:

- **Status** (e.g. Filled, Open, Cancelled)
- **My Association** (Primary or secondary hiring manager)
- **Department**
- **Hiring Manager**
- **Recruiter**
- **Job Family**
- **Recruiting Location**
- **Created In** (Year job opening was created)

Filter by

Status
 110 Filled (3)
 010 Open (2)
 120 Canceled (1)

My Association
 Hiring Manager (6)
 Primary Hiring Manager (3)

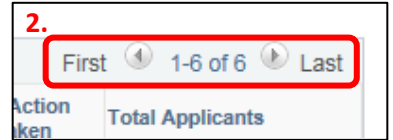
Department
 EUD (4)
 Caretaking - Area 1 (1)
 Energy Management (1)

These options allow you to easily narrow your results to find the job opening you are looking for.

1. Each of the columns on this screen can be sorted by clicking on the column header.
 - Clicking a column header **once** will sort the column alphabetically or numerically in **ascending order**.
 - Clicking a column header **twice** will sort the column alphabetically or numerically in **descending order**.

Job Openings 1.									
Job ID	Posting Title	Category	Recruiting Location	Department	Business Unit	Days Open	Status	No Action Taken	Total Applicants
13754	Sessional Faculty Position, Fa...	<input type="checkbox"/>	Foothills Campus	Dean's Office - Vet Medicine	UCALG - Operating	69	010 Open	5	4

- If you have a large number of job postings, there may be multiple pages for you to review. You can navigate between multiple pages using the arrow buttons in the top right corner of the Job Openings window.



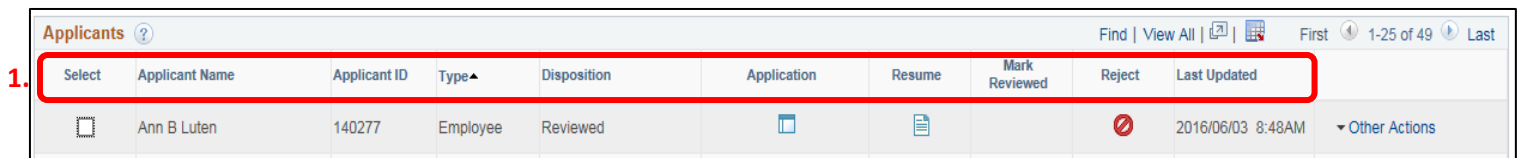
- To access a job opening, click on the title of the job you wish to view (e.g. Assistant or Associate Professor).

Job Openings				
Job ID	Posting Title	Category	Recruiting Location	Depa
13754	Sessional Faculty Position, Fa...	<input type="checkbox"/>	Foothills Campus	Deap Med
13622	Sessional Instructor, Anatomic...	<input type="checkbox"/>	Foothills Campus	Deap Med
13040	Assistant or Associate Profess...	<input type="checkbox"/>	Foothills Campus	Deap Med

The **Manage Job Opening** page is displayed. To learn more about the Manage Job Opening page, proceed to [Topic 4: View Resume/CV](#) in this guide.

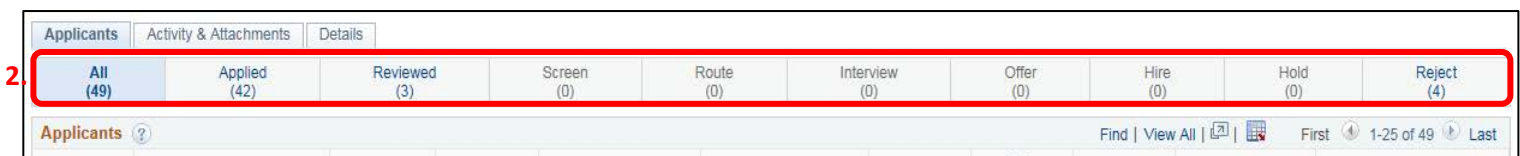
Topic 3: Sorting or Filtering your Applicant List

- Under the **Applicants** section, you can easily sort applicants by clicking on the column header.
 - Clicking a column header **once** will sort the column alphabetically or numerically in **ascending** order.
 - Clicking a column header **twice** will sort the column alphabetically or numerically in **descending** order.



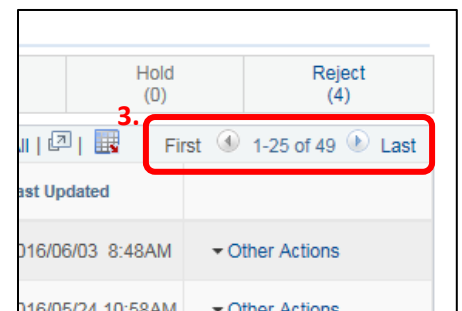
Select	Applicant Name	Applicant ID	Type	Disposition	Application	Resume	Mark Reviewed	Reject	Last Updated
<input type="checkbox"/>	Ann B Luten	140277	Employee	Reviewed					2016/06/03 8:48AM

- To filter applicants based on their status, you can click on the disposition tabs across the top of the **Applicants** window.



All (49)	Applied (42)	Reviewed (3)	Screen (0)	Route (0)	Interview (0)	Offer (0)	Hire (0)	Hold (0)	Reject (4)
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- The Applicants section of the Manage Job Openings page only displays 25 results at one time. To view additional results, you can navigate between multiple pages using the arrow buttons in the top right corner of the Applications section.



Hold (0)	Reject (4)
First 1-25 of 49 Last	
016/06/03 8:48AM	Other Actions
016/05/24 10:58AM	Other Actions

Topic 4: View Resume/Curriculum Vitae (CV)

- To view a candidate's resume/curriculum vitae (CV), from the **Manage Job Opening** screen, click the **Resume** button (📄) under the **Resume** column.

Select	Applicant Name	Applicant ID	Type▲	Disposition	Application	Resume
<input type="checkbox"/>	Ann B Luten	140277	Employee	Reviewed		1.
<input type="checkbox"/>	Richard Osei-Appiah	69554	Employee	Reviewed		

- Depending on the format of the CV, it will usually open in one of two ways:
 - If the CV is in a **PDF** format, it will open in a **new tab/window***.
 - If the CV is in a **Microsoft Word** format, you will be prompted to **save or open** the file on your computer.

Topic 5: View Application Details Including Additional Application Documents

- To view a candidate's application information, click the **View Application Details** button (📄) under the **Application** column.

Select	Applicant Name	Applicant ID	Type▲	Disposition	Application
<input type="checkbox"/>	Ann B Luten	140277	Employee	Reviewed	1.

The **View Application Details** page opens in a new tab/window*. Within this window, you can view the candidate's name, contact information, application documents and their responses to the standard questions asked as part of the application.

- To view the applicant's answers to standard questions asked as part of the application process (e.g. "Are you a Canadian citizen or a permanent resident of Canada?"), click the **View Questionnaire** link under the **Job Openings** section, which will open in a new window.

Job Opening ID	Posting Title	View Questionnaire
13774	Assistant Professor, Biostatistics, Department of Mathematics and Statistics	2.

***Note:** If the page does not open, you will likely need to adjust your computer's browser settings to allow pop-ups. Contact the IT Help Desk at 220-5555 if you require assistance.



- To view other documents attached as part of the application, go to the **Attachments** section on the right side of the **View Application Details** page beneath the Resume section. Any documents the candidate attached as part of their application package will be displayed here and you can view them by clicking the link under the Attachment column.

Resume Attachment

Attachment

1508180201.docx

Resume Text

Test Applicant
123 4th Street SW
Calgary, AB T2N 1N4
Email: abc@hotmail.com Phone (403) 555-1234

Education

Attachments

Attachment	Attachment Title	Attachment Type	Apply to All	Last Updated
Research_Statement_Test_A...	Research_Statement_Test_Applic	Online Application - Add'l Doc	<input type="checkbox"/>	2017/11/07 11:31AM
Teaching_dossier_Test_App...	Teaching_dossier_Test_Applican	Online Application - Add'l Doc	<input type="checkbox"/>	2017/11/07 11:31AM
References_Test_Applicant...	References_Test_Applicant.pdf	Online Application - Add'l Doc	<input type="checkbox"/>	2017/11/07 11:31AM

USEFUL TIP: Following the closing date of the job posting, a report will be sent to the selection committee chair and department administrator which will include all applicant answers to the screening questions. A summary of applicant employment equity data is available upon request.

- Close the **View Application Details** tab/window to return to the **Manage Job Openings** screen.

Topic 6: Update Applicant Status

Applicant status is a candidate's standing relative to a specific job opening. For example, a candidate will initially appear in 'Applied' status, and can be updated to 'Reviewed' or 'Reject' status as the recruitment process unfolds. Applicant status is referred to as **Disposition** in our system.

It is important to note that an applicant's status or disposition is not unique to each reviewer, therefore it is required that one individual manage the status of all the applicants to avoid confusion. In general all applicants will appear as 'Applied' initially, unless someone has completed an initial screening of applications.

Once the selection committee has reviewed the applicants and agreed who is moving forward in the recruitment process, the designated individual can update the disposition status of those applicants (e.g. from **Applied** to **Reviewed**). You are not required to update the status of those applicants not selected, though you have the ability to do this should you choose, in order to help organize the applicants.

To mark an application as reviewed, or to reject an application, there are quick links located within the table on the Manage Job Opening screen.

1. To mark an application as reviewed, click the **Mark Reviewed** (✔) button.
2. To mark an applicant as rejected, click the **Reject** (⊘) button.

Application	Resume	Mark Reviewed	Route	Reject	Print	Last Updated
		1.		2.		2018/08/31 11:15PM
						2018/08/31 9:56PM
						2018/08/31 9:25PM

For all other dispositions, or to reverse a disposition change, use the following process:

3. Click on the **Other Actions** dropdown menu for the applicant you wish to edit.
4. Click **Recruiting Actions**.
5. Click **Edit Disposition**.

Hire (0)	Hold (0)	Reject (4)
Find View All First 1-25 of 49 Last		
Reject	Last Updated	
	2016/06/03 8:48AM	3.
	2016/05/24 10:58AM	4.
	2016/02/10 5:10PM	
	2016/02/15 12:43PM	

The **Edit Disposition** window appears.

6. Click on the **New Disposition** dropdown menu and select the appropriate disposition status (e.g. Interview).

Note: The **Status Reason** dropdown is not used when editing the disposition.

7. (Optional) The date defaults to today's date. If necessary, you can modify the date that the new disposition takes effect.

Edit Disposition Help

Current Disposition 020 Reviewed

*New Disposition

Status Reason

Date 2016/06/24

8.

8. Click **Save**.

You are returned to the **Manage Job Opening** page.

Topic 7: Route (Email) an Application to Search Committee Member(s)

Selection committee members and department administrators have the ability to email a candidate’s application (including their CV and other documents attached as part of the on-line application) to other individuals involved in the selection process who don’t have access to view applicants in the system through the use of the Route function.

USEFUL TIP: As a reminder, disclosure of recruitment files should be limited to members of the selection committee, except for the purpose of public presentations.

To email a candidate’s application package to another individual on the selection committee, use the quick link located within the table on the Manage Job Opening screen.

1. Click on the **Route** (👤) button to the right of the applicant you wish to forward.

The **Route Applicant** window is displayed.

Mark Reviewed	Route	Reject	Print	Last Updated
	1.			2018/08/31 11:15PM
				2018/08/31 9:56PM
				2018/08/31 9:25PM

Route Applicant

Submit | Return

Applicants to Route

Applicant ID	Name	Job Opening
234709	2. Test Applicant	Canada Research Chair (Tier II) in Computational Neuroscience, Departments of Cell Biology & Anatomy and Clinical Neurosciences, Cumming School of Medicine

Routing Details

*Routing Status: 010 Route Reason: []

Recipients

*Routing Date	3. *Name	Assignment	Response Due Date
2018/10/04	JOHN SMITH		

Add Recipient Add Hiring Team

2. Confirm that the **Applicant Name** and associated **Job Opening** is correct.
3. The Primary Hiring Manager’s name will display as the default recipient. You can change the recipient by clicking on the Look up button to select a different recipient.
4. The Look Up Recipient window allows you to search by Empl ID or by Name (‘First Middle Lastname’). If you are searching by name but you want to search by last name, update the **Name** dropdown from ‘begins with’ to ‘contains’, type in the name and hit Look up. Click on the correct individual from the results list and the name selected will populate on the **Route Applicant** page.

Look Up Recipient

4. Empl ID begins with []

Name begins with contains []

Look not = Cancel Basic

Lookup < <=

USEFUL TIP: Only UCalgary employees and students are selectable.



The screenshot shows the 'Routing Details' form. At the top, there are dropdown menus for '*Routing Status' (set to '010 Route') and 'Reason'. Below this is a table for 'Recipients' with columns for '*Routing Date', '*Name', 'Assignment', and 'Response Due Date'. A row is present for 'John Smith' with a date of '2018/10/04'. Below the table are two buttons: 'Add Recipient' (highlighted with a red box and number 5) and 'Add Hiring Team'. A 'Notification' section follows, containing a large 'Comments' text area (highlighted with a red box and number 6). Below the comments is a checkbox for 'Consolidate all applicants in one email' (highlighted with a red box and number 10). Underneath are two buttons: 'Include Attachments' (highlighted with a red box and number 7) and 'Preview Notification' (highlighted with a red box and number 8). At the bottom left is a checked checkbox 'Notify me when a Recipient responds' and a 'Submit' button (highlighted with a red box and number 9). A 'Return' button is also visible. The bottom right corner has a 'Top of Page' link.

5. To add additional recipients, click the **Add Recipient** button and another row will be added where you can follow steps 3-4 to insert another individual.

Note: There is no need to complete the **Response Due Date** field.

6. Enter the desired information into the **Comments** field which will be visible in the email message for the recipient(s).

7. As a default, the CV document as well as all additional on-line attachments will be included as attachments on the email. If you would like to include just the CV or just the additional documents, you can click the **Include Attachments** button to limit what is included in the email.

8. You can preview the email by selecting the **Preview Notification** button. The applicant's documents will appear in the preview for review, and you'll note the files names will be updated. (This becomes especially important when using the function to send multiple applicants as it helps the recipient to more easily identify which attachments are associated with which applicant).

Note: Although the **Notify me when a Recipient responds** box is checked, as currently designed no response is expected from the recipient and therefore no associated notification is sent back to the initiator.

9. To send the email, click **Submit**.

You are returned to the **Manage Job Opening** screen.

Interested in sending multiple candidate application documents at once?

You can accomplish that by using the Group Action function. See [Topic 9 - Performing Group Actions](#) for more info.

USEFUL TIP: 10. When Routing multiple applicants at once, you can chose to send a single email with all applicant attachments included or an individual email for each applicant. If you wish to send a single email, you must check the **Consolidate all applicants in one email** option shown above.

Topic 8: Email a Candidate (Send Correspondence)

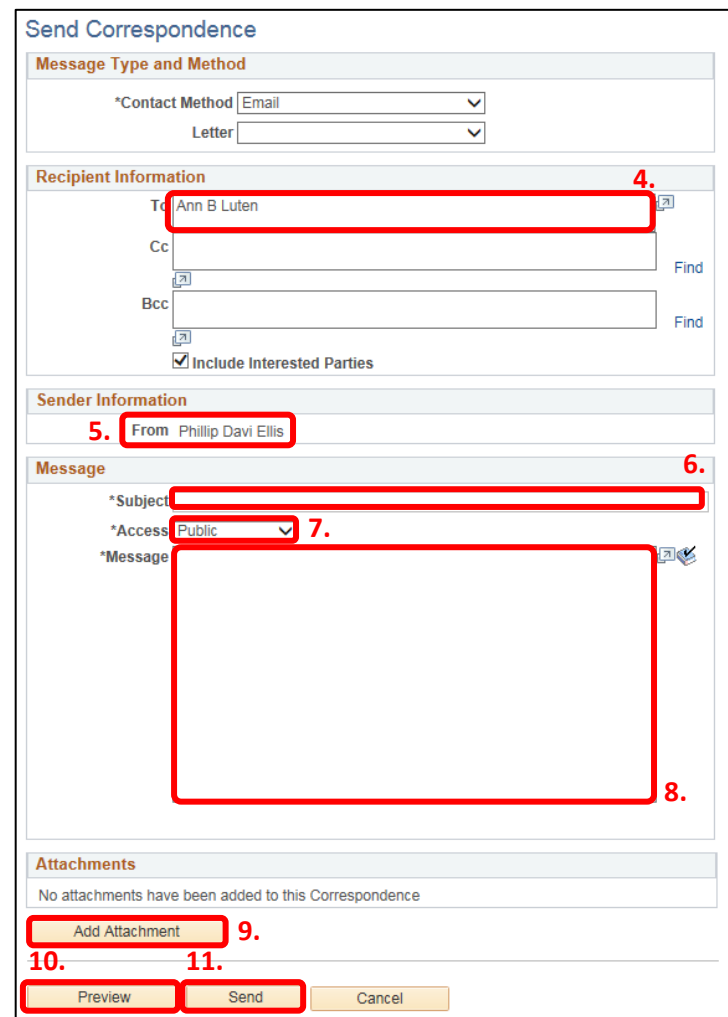
Hiring managers can send email to applicants directly through PeopleSoft using the Send Correspondence function.

1. Click on the **Other Actions** dropdown menu for the applicant you wish to correspond with.
2. Click **Applicant Actions**.
3. Click **Send Correspondence**.



The **Send Correspondence** window is displayed.

4. Confirm the name of the applicant appears in the **To** field. In the event that you are corresponding with more than one applicant, each person will receive an individual email addressed to them only.
5. The Sender Information auto populates based on your login information. Confirm your name appears in this location.
6. Enter a **Subject** to indicate the purpose of your email.
7. Confirm the **Access** field is defaulted to **Public**, allowing the Recruiters to view a record of the email in the applicant's Contact Notes.
8. Enter the desired information into the **Message** field.
9. **(Optional)** If you wish to add an attachment to the email, click the **Add Attachment** button. Once clicked, you can browse for a document on your computer and upload it to the message.
10. You can preview the email by selecting the **Preview** button. Note that the applicant's resume will not appear in the preview, however it will be attached when the email is sent.
11. To send the email to the applicant, click **Send**.



You are returned to the **Manage Job Opening** screen.

USEFUL TIP: You can send emails to multiple candidates at the same time. See [Topic 9: Performing Group Actions](#) for more information. Using the Group Action function will send each selected candidate an individual email.

Topic 9: Performing Group Actions

In situations where a group of applicants need to be updated for the same reason, you can use the **Group Actions** option.

To perform a group action, follow these steps:

1. Click the boxes to the left of the applicants' names that you would like to include in the group action (or use the **Select All** option at the bottom of the applicant list).
2. Click the **Group Actions** dropdown at the bottom of the screen.
3. Select the action you would like to perform. Options under **Recruiting Actions** include:
 - **Mark Reviewed** (see [Topic 6: Update Applicant Status](#))
 - **Reject Applicant** (see [Topic 6: Update Applicant Status](#))
 - **Route Applicant** (see [Topic 7: Route \(Email\) an Application](#))
 - **Withdraw Application** (discuss with your Recruiter)

Under **Applicant Actions** you will find:

- **Send Correspondence** (see [Topic 8: Email a Candidate](#))

4. Depending on the type of action you are performing, you may be asked to confirm the action or complete additional steps. Complete the additional steps or confirm as required.

