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*

☐ 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.