Applicant Progress Board Overview

Overview

The Applicant Progress Board (APB) is a quick and easy way for to identify the best talent and progress them through the hiring process. This provides users with:

- A view of all the applications for their job requisitions in list form with powerful searching, sorting and filtering capabilities.
- An aggregate card view of the progress of all the applications for a job sorted by application.
- Application details surfacing the most important information to make screening decisions with quick access to the key links and documents.

Accessing the Board

Users can access the Applicant Progress Board via the following locations:

Hiring Managers
- Hiring Manager Dashboard tile
- My Jobs page - Review Applications link
- Edit Job page - View Applications button*

Recruiters
- Recruiter Dashboard – Person icon
- Manage Applications menu link *
- Edit Job page - View Applications button *

*Upon first access to these links, the Applicant Progress Board will display by default instead of the Manage applications page. Users can switch between the two views by clicking either the List view or Kanban view buttons and the Manage applications button at the top right side.

List View

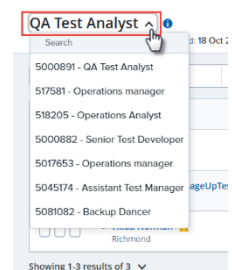Users are shown a list of all applications for a given job.

A – Selecting which Job to view

Should you have more than one job active at a time, you can easily navigate to them by using the job selector drop-down menu:

1. Simply click on the drop-down menu
2. Select the appropriate job (only your jobs will be listed for you to select from)

From the job drop-down, a user will be able to view jobs that they are assigned to as either the: Hiring Manager, Search Chair, Recruiter, Assistant Recruiter, or Requisitioner.

B - List View layout

Some of the cells in the list are clickable, depending on permissions, that allow users to perform actions or be redirected to a different page to go into more detail on a record.

Applicant name

Users may click an Applicant Name to load the full applicant's card. In some cases, the Applicant Name may be read-only if certain users are not required to view the full applicant profile, including other applications they may have made. This column also contains more details about the applicant, such as their contact details and their application's submission date.

Flags

Users may view application and applicant flags in this column if they have the relevant permissions, which can be read only if required.

Application status

This column shows the current status of an application. Users can Progress or Decline a single application in a row and the suggested next statuses in the recruitment process will display. To progress an application to a status not listed, select Other and the full change status dialogue will appear.

To Progress or Decline a set of applications, users can categorize applications into the green (progress), yellow (maybe/hold) or red (decline/make unsuccessful) buckets to update the status altogether using Bulk actions.

Scores

In this column, users can view the overall score for a given assessment, the application form score, and the Engagement score exported from Recruitment Marketing.

Documents

This column contains quick links to the application form, cover letter, resume.

C - Quick Actions

This column displays actions that users can take against the application depending on its current status. Users can Progress or Decline a single application in a row and the suggested next statuses in the recruitment process will display. To progress an application to a status not listed, click Select Other and the full change status list will display.

D - More Actions

Secondary actions are found in the kebab menu on the last column of the grid.

- Assign and remove application and applicant flags
- Add application notes
- Add documents
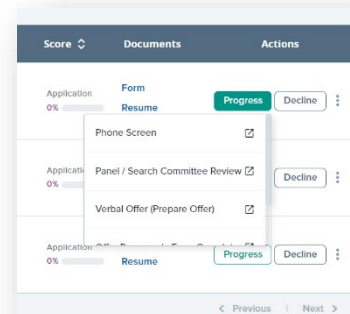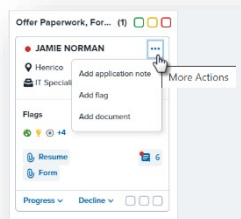
E - Sorting

Applications can be sorted by clicking the column headers with a sorting icon (arrow):

- Applicant name alphabetically or by date submitted

- Application status
- Scores by application form score, assessment score or engagement score

F - Filters and Search
Within the filters button, users can apply a combination of filters to display only the applications that fit their filter criteria. Users can currently filter by:
- Application status
- Assessment status
- Flags
- Scores:
  - Application form score

G - Bulk Actions and Selections
When viewing applications either by using quick links or via the applicant card, users can categorize applications into groups or 'buckets' to progress or decline via bulk actions.

Selections made in the applicant card are 'sticky' so that when the user returns to the List, the total count of selected records for each bucket displays in the page footer.

Once selections have been made, users can click the bucket count to perform a number of bulk actions against the selected records per bucket.

Or click on Bulk Actions to action all 3 buckets together with different outcomes.
- To add all sections to a bucket, click the relevant bucket icon in the column header
- To remove all selections from a bucket, click the relevant bucket icon in the footer.
- To remove all selections from all buckets, press the Escape keyboard button.

H – Switch to Card View
Move to the Card View Layout.

Card View Layout
You will see all your relevant applications for a specific job, displayed as cards that are aligned to their current application status, displayed as columns.
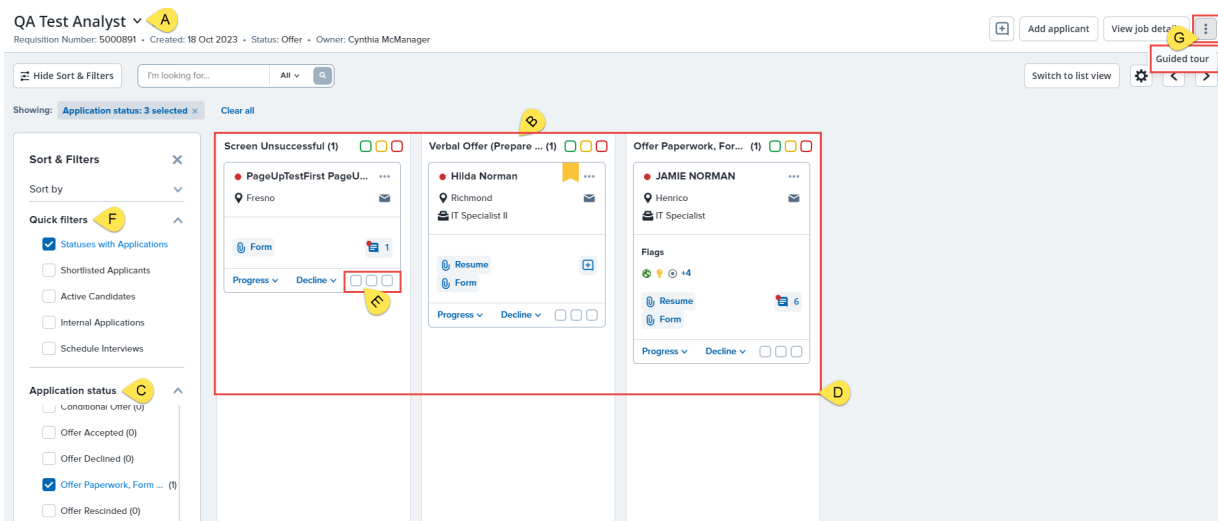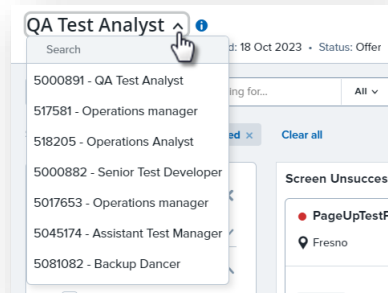
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B & C – Selecting which Application Status to view

All cards are grouped in Application Statuses displayed as columns. All columns will be shown by default to give you an aggregate view of the applications in each job.

To configure your view of the board, select the Application Statuses that you'd like to view in the selection menu at the left part of the board. Be sure to click "Apply" to submit selections.
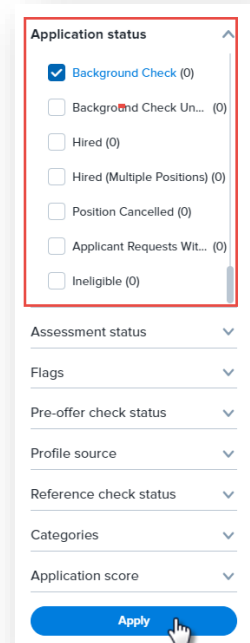
D – Reviewing & Actioning Applications
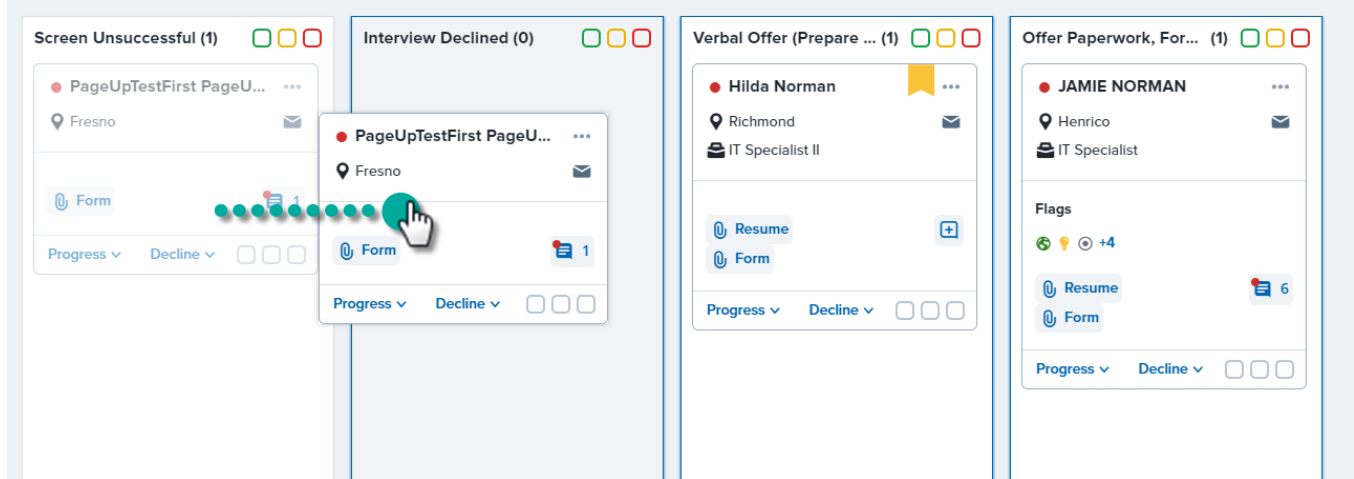
Viewing Application Details

Each card is an application, and the card layout is grouped into sections:

- Applicant information as well as a notification indicator displaying if an application has been idle.
- Screening data which surfaces Flags and a Scores section with Application Form.
- Quick actions to Progress or Decline

Users may click on a card to load the full applicant's profile (if they have permission).

Changing the Application status via Drag and Drop

After reviewing and deciding on each applicant, drag and drop applications to the relevant next application status.

Accessing Key Actions via the More Actions Menu

By clicking on the ellipsis on an application, you may access the more actions menu where you may easily access key actions like changing an application's status and viewing application answers.

E – Bulk Actions

Select multiple applications and group their selection into 3 different groupings for bulk actions - Bulk Move, Bulk Communicate, and Bulk Compile and Send.
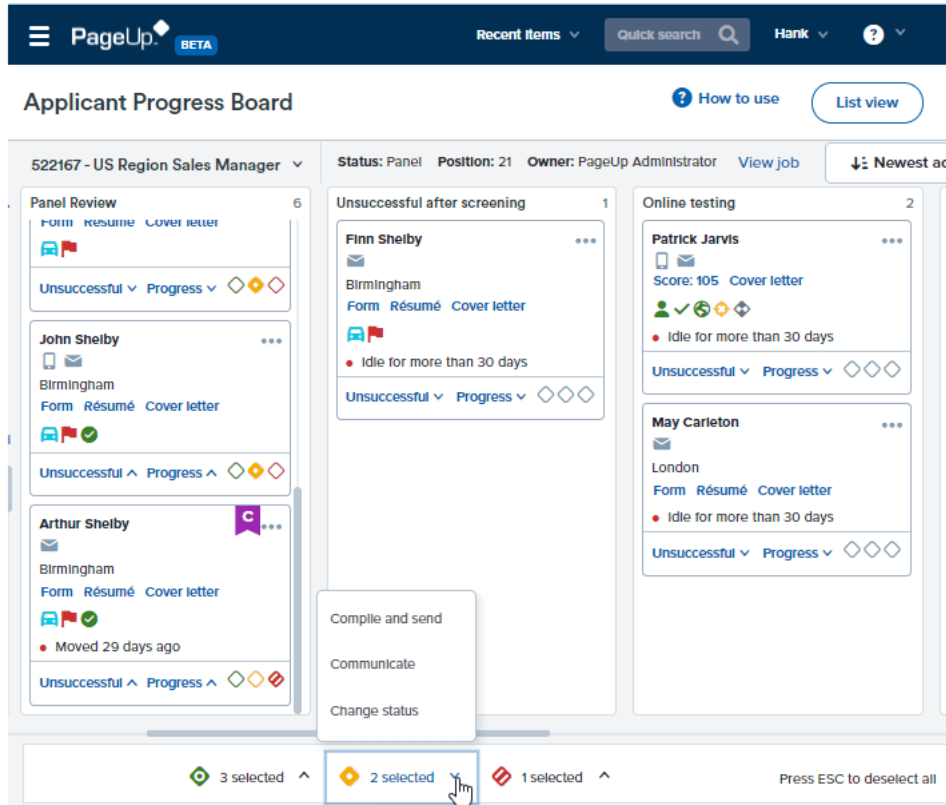
F – Quick Filters

Filter the applications and application statuses displayed on the board through preset application information including Shortlisted Applications, Current Application Statuses and Internal Applicants.

G – Guided Tour

You can learn about the using the Applicant Progress Board via access to the Quick Start Guide and the User Guide.