

Applicant Progress Board – Dispositioning Applicants

Overview

The Applicant Progress Board (APB) is a quick and easy way 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 Board view buttons at the top right side of the page.

List View

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

The screenshot shows the PageUp Applicant Progress Board in List View. The interface includes a navigation bar with 'PageUp BETA', 'Jobs', 'People', 'Reports', 'Settings', 'Recent Items', 'Quick search', and 'PageUp (1125)'. The job details are '492307 - Admin and Office Spec II', 'Job status: Approved', 'Position: 1', and 'Owner: TERRI HUGHES'. The list view shows three applications:

Applicant name	Flags	Application status	Screening activities	Score	Documents	Actions
B DEC 13 2022 Glenn Blair Chester allen.blair@dhrm.virginia.gov	G +4	New		Application 0%	Form Resume	C Progress Decline
DEC 7 2022 Teddy Bear Chesterfield terri.hughes@dhrm.virginia.gov		Hiring Manager Review Successful		Application 0%	Form Resume	Progress Decline
DEC 6 2022 JANE DHRM RICHMOND loni.dickerson@dhrm.virginia.gov		Panel / Search Committee Review		Application 0%	Form Resume	Progress Decline

At the bottom, it shows '1 - 3 results out of 3' and navigation buttons for 'Previous' and 'Next'. A link to 'Switch to previous Manage Applications experience' is also present.

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 or Recruiter.

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

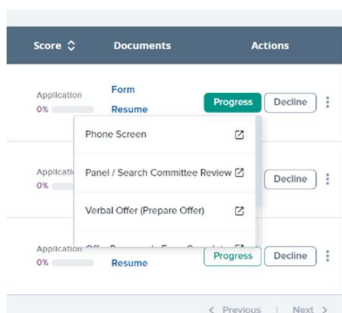
In this column, users can view the overall score for a given assessment, the application form score, and the Engagement score exported from COV career site.

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 ellipsis, three dots, 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
- 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.

The screenshot displays a web application interface for managing job applicants. At the top, there is a header with the job title '492216 - Assistant IT Support', job status 'Compliance Review', position '3', owner 'Harry Hire', and a 'View Job' link. A 'Guided tour' button is also present. Below the header is a search bar and a 'Filters' button. The main content area is a table with columns: Applicant name, Flags, Application status, Screening activities, Score, Documents, and Actions. The table lists four applicants: Kane Patrick (Interview), Andy Ableton (Verbal offer), Brett Bolton (Compliance Review), and Mary Maples (Compliance Review). At the bottom, a yellow bar shows selection counts: '2 selected', '1 selected', and '1 selected', along with a 'Bulk Actions' button. A 'Share feedback' button and a note 'Press ESC to deselect all' are also visible.

Applicant name	Flags	Application status	Screening activities	Score	Documents	Actions
<small>FEB 7 2018</small> Kane Patrick New York kane.ndfdfdfdoble@pageuppeople.com		Interview			Resume	Progress Decline
<small>JUN 24 2016</small> Andy Ableton Upton kanen+applicant@example.com 07952624951		Verbal offer (Prepare Offer)				Progress Decline
<small>JUN 24 2016</small> Brett Bolton San Jose brett@example.com 123456789		Compliance Review				Progress Decline
<small>JUN 24 2016</small> Mary Maples Melbourne		Compliance Review				Progress Decline

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 - Anonymized Profiles

Users can opt-in to Anonymize Profiles to try out this feature. If enabled, names and contact details will be obfuscated with a 'click to reveal' icon. This is to encourage users not to consider an applicant's name, which can be an indicator of a person's race, ethnicity or cultural background when making screening and shortlisting decisions.

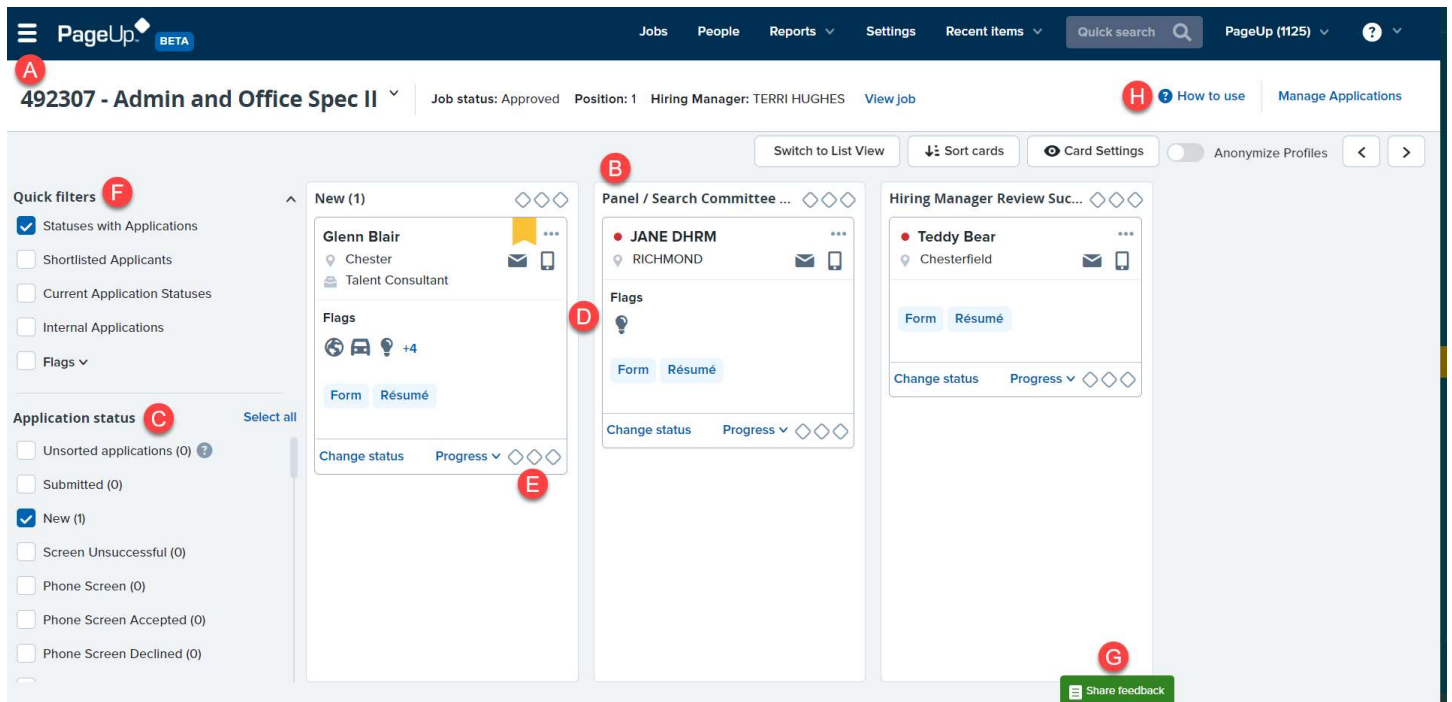


I – Switch to Card View

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.



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 or Recruiter.

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.

The screenshot shows the PageUp application interface for job 492216 - Assistant IT Support. The top navigation bar includes 'Jobs', 'People', 'Reports', 'Settings', 'Recent items', and a search bar. The job details section shows 'Job status: Compliance Review', 'Position: 3', and 'Hiring Manager: Harry Hire'. The main area is a Kanban board with three columns: 'Interview (1)', 'Compliance Review (2)', and 'Verbal offer (Prepare Offer...)'. Each column contains application cards for Kane Patrick, Mary Maples, and Brett Bolton. The left sidebar has 'Quick filters' (Statuses with Applications, Shortlisted Applicants, Current Application Statuses, Internal Applications, Flags) and 'Application status' (Unsorted applications (0), Submitted (0), New (0), Screen unsuccessful (0), Phone screen (0), Phone screen unsuccessful (0), Search committee review (0)).

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.

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

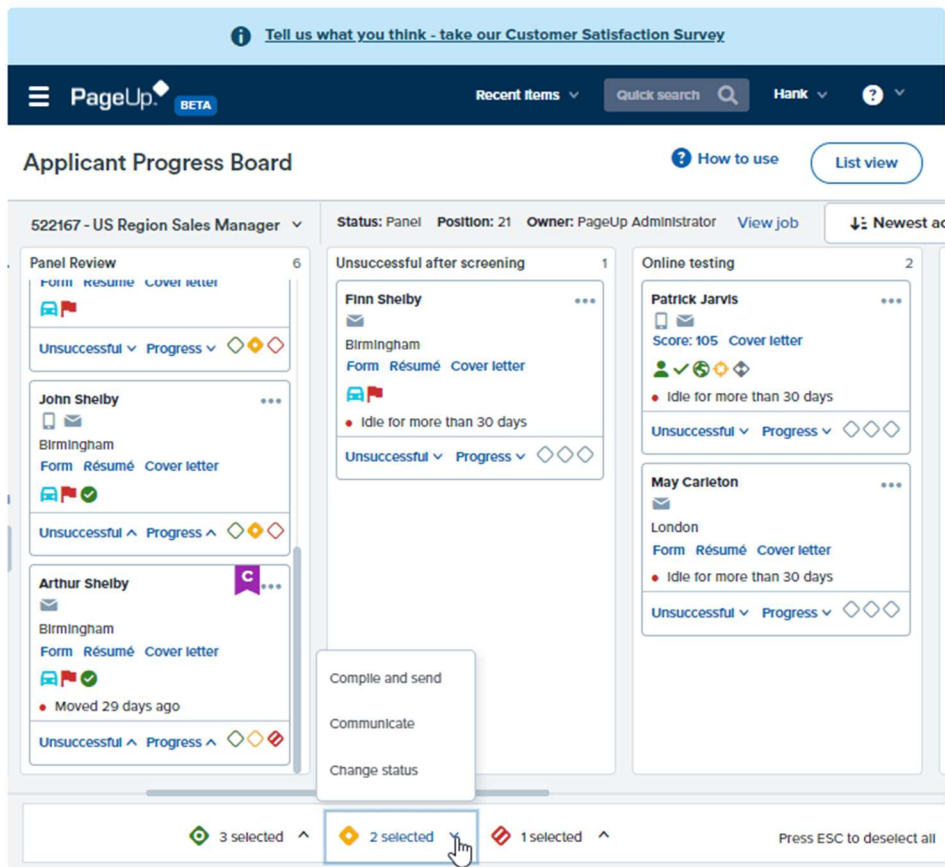
After reviewing and making a decision regarding each applicant, drag and drop applications to the relevant next application status.

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 – Sharing Feedback

To share feedback, simply click on the survey at the middle right part of the Applicant Progress Board page.

H – How to Use Guides

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