

New Bulk Actions Guide for SkillSurvey Reference

SkillSurvey companies now have the ability take Bulk Actions instead of doing these actions individually, saving valuable time and effort. Bulk Actions can apply to one, all or multiple, selected individuals within the search results.

Key things to note about Bulk Actions: Bulk Actions can only be taken on active / in progress Candidates.

How to take Bulk Actions:

1. Go to Candidates > Manage Candidates > **Bulk Actions**.

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REF	ERENCE	SOURC	Æ				
Home	Home Candidates > Repo		Settings :	Help >			Search by first name Search by last name Advanced Search
	Manage Candidate	s >	Manage My Ca				
My Doo	Create Candidate						
IVIY Das	File Candidates		Bulk Actions	•			
My Can	Run Candidate Cor			0	Waiting to Finalize	0	My Recent Candidates 0
,	Manage Employme					-	,
	Upload Candidates						
No Candidates					No Candidates waiting to finalize		No recent Candidates

2. On the Manage Candidates screen, scroll down to the Bulk Actions tab.

Manage Candidates	What Happens After Creating a Ca	ndidate?
 Search Criteria - Customize Your Search 	h Here	*indicates required fields
First Name:		
Last Name:		
Select Division: *	All	
Select Workforce Segment:	All	
Display Candidates for Recruiter: *	All	
	All Active Inactive	
Position ID:		
Job Title:		
Days Since Candidate Entered: *	All	
	Search	
My Candidates All Candidates Bulk Act	lions	
Waiting for Candidate 6		



3. See the (4) options for taking bulk actions:

My Candidates	All Candidates	Bulk Actions					
Waiting for	Candidate 6 🕧						
Waiting for I	Reference 1 🕧						
 Waiting to F 	Finalize 0 ()						
Available to	Re-Finalize 0 😗						

- Waiting for Candidate: This section allows you to re-send the original email to the Candidate. This is the same function available on the Candidate Details page.
 - Click a column header to sort on that column.
 - Select one, multiple, or all Candidates when performing this function.
- Waiting for Reference: This allows you to resend the original email to all the Reference Providers entered for the Candidate.
 - You may re-send an email to a Reference Provider a maximum of two (2) times. This includes re-sending the emails from the Bulk Actions page, as well as from the Candidate Details page.
 - Click on the number shown in the Entered, Sent and Rec'd columns to see which Reference Providers fall under each status.
 - In the Candidate Details column, click the Reference Details link to see an overview of all References for the Candidate.
 - Click a column header to sort on that column.
 - Select one, multiple, or all Candidates when performing this function.
- Waiting to Finalize: This section allows you to finalize the report for a Candidate. This is the same function available on the Candidate Details page.
 - Click on the number shown in the Entered, Sent, Rec'd and Mgrs. Rec'd columns to see which Reference Providers fall under each status.
 - Click a column header to sort on that column.
 - Select one, multiple, or all Candidates when performing this function.
- Available to Re-Finalize: This section allows you to re-finalize the report for a Candidate when the required number of additional Reference Providers have responded.
 - Click on the number shown in the Entered, Sent, Rec'd and Mgrs. Rec'd columns to see which Reference Providers fall under each status.
 - Click a column header to sort on that column.
 - o Select one, multiple, or all Candidates when performing this function



4. For the Bulk Action you wish to take, click anywhere on the panel to open it (for this example, **Resend Candidate Email).**

M	y Cano	didates	All Candidates	Bulk Actions											
-	VVa	iting for C	andidate 79 🕧												
	R	esend Ca	ndidate Email												
															Show 10 records
		Penorts	First Name	Last Name	Pacruitar	Division	Workforce	Position	Survey	Created Date	Last Email	References			Candidate Status
		Reports	<u>i iist nuine</u>	Lust Hume	<u>reconditer</u>	DIVISION	Segment		<u>ourrey</u>	<u>orcated bate</u>	<u>Sent</u>	Entered	Sent	Rec'd	
			∇ Contains	♥ Contains	∇ Contains		Contains Contains Contains Contains Contains	♥ Contains	Contains	⊽ 0n *	▼ On *			∇ Equals	
			Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
			John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
			Jane	Same	Harriman, Averil	General Industry	Salaried	Project Manager	Construction Manager (with Safety-Related Behaviors)	08/01/2018	4/17/2019	0	0	0	No refs entered
			Yogesh	Flow	Badgujar, Mr Dinesh	General Industry	Hourly	Pediatric	rghertyh	07/26/2018	7/28/2018	0	0	0	No refs entered

- 5. The Bulk Actions grid contains the following columns:
 - First Name (Candidate)
 - Last Name (Candidate)
 - Recruiter
 - Division

 - Position
 - Survey
 - Created Date (date that Candidate was created)
 - References Entered
 - References Sent
 - Reference Responses Received
 - Manager Responses Received (for Waiting to Finalize, Available to Re-Finalize, and Career Readiness Report Available)
 - Candidate Status (contains details about where the Candidates and References are the process.)
- 6. As needed, click a column header to sort on that column. To search for a specific value, enter that value in the search box under the column header.

My Cand	idates	All Candidates	Bulk Actions											
🔻 Wai	Waiting for Candidate 79 🚯													
Re	send Ca	andidate Email												
														Show 10 records
	Reports	First Name	Last Name	Recruiter	Division	Workforce	Position	<u>Survey</u>	Created Date	Last Email	References			Candidate Status
		√ Contains	♥ Contains	⊽ Contains	▼ Contains	v Contains	∇ Contains	∇ Contains	⊽ On ▼	v On ▼	Entered v Equals	Sent V Equals	Rec'd	
		Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
		John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
		Jane	Same	Harriman, Averil	General Industry	Salaried	Project Manager	Construction Manager (with Safety-Related Behaviors)	08/01/2018	4/17/2019	0	0	0	No refs entered
		Yogesh	Flow	Badgujar, Mr Dinesh	General Industry	Hourly	Pediatric	rghertyh	07/26/2018	7/28/2018	0	0	0	No refs entered



7. Click the checkbox to the left of each Candidate's name to select the Candidates you want to take the bulk action on.

/ Cano	didates	All Candidates	Bulk Actions											
• Wa	iting for C	andidate 79 🚯												
Re	esend Ca	ndidate Email												
4 C	andidate(s	i) selected												Show 10 v re
	Reports	First Name	Last Name	Recruiter	Division	Workforce	Position	Survey	Created Date	Last Email	References			Candidate Status
						Segment				Sent	Entered	Sent	Rec'd	
_		♥ Contains	♥ Contains	V Contains	♥ Contains	∇ Contains	V Contains	Contains	⊽ On	v On ▼		V Equals	▼ Equals.	
•		Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
•		John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
•		Jane	Same	Harriman, Averil	General Industry	Salaried	Project Manager	Construction Manager (with Safety-Related Behaviors)	08/01/2018	4/17/2019	0	0	0	No refs entered
•		Yogesh	Flow	Badgujar, Mr Dinesh	General Industry	Hourly	Pediatric	rghertyh	07/26/2018	7/28/2018	0	0	0	No refs entered

8. Click the button to take the bulk action (for this example, **Resend Candidate Email**).

v W	Vaiting for Candidate 79 🚯													
Resend Candidate Email														
6	6 Candidate(s) selected													Show 10 records
	Reports First Name Last Name Recruiter Division Workforce Position Survey Created Date													Candidate Status
						Segment				Sent	Entered	Sent	Rec'd	
		♥ Contains	♥ Contains	♥ Contains	♥ Contains	♥ Contains	♥ Contains	♥ Contains	⊽!On ▼	⊽ On ▼	▼ Equals			
		Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
		John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
•		Jane	Same	Harriman, Averil	General Industry	Salaried	Project Manager	Construction Manager (with Safety-Related Behaviors)	08/01/2018	4/17/2019	0	0	0	No refs entered
		Yogesh	Flow	Badgujar, Mr Dinesh	General Industry	Hourly	Pediatric	rghertyh	07/26/2018	7/28/2018	0	0	0	No refs entered
•		Stahma	Tarr	Vinacci, Anita	Cred	Hourty	Project Manager	rghertyh	06/19/2018	6/19/2018	0	0	0	No refs entered
		Rosalind	Wood	Fontana, Mary Anne	General Industry	Salaried	Project Manager	Project Manager	06/14/2018	6/14/2018	0	0	0	No refs entered

9. A confirmation dialog displays. Select **Continue** to confirm the action or **Cancel** to return to the Bulk Actions panel with no action.

• 1	Vaiting for Candidate 5 🚯													
	Resend Candidate Email													
ł	5 Candidate(s) selected Show													Show 10 records
V	Workforce Last Name Last Name References Segment Segment Segment Sent Entered Sent References												Candidate Status	
						⊽ Contains			⊽ On 💌	⊽ On ▼	Entered v Equals.	<u>Sent</u> ⊽ Equals.	Rec'd ⊽ Equals.	
*		Elliot	Spencer	Fontana, Mary Anne	Corporate	Nor Resend Ca	andidate Emai	i ×	06/25/2019	6/26/2019	0	0	0	No refs entered
*		Diana	Rigg	Fontana, Mary Anne	Corporate	Click the Con 5 candidate(:	tinue button to ser s) otherwise click (no action.	ad the email(s) to the Cancel to return with	06/25/2019	6/26/2019	0	0	0	No refs entered
*		RJ	MacReady	Fontana, Mary Anne	Corporate	None	Intern	Teaching/Educ	06/25/2019	6/26/2019	0	0	0	No refs entered
*		John	Winston	Fontana, Mary Anne	Corporate	None	Teaching Intern	Career Readiness - Teaching/Educ	06/25/2019	6/26/2019	0	0	0	No refs entered
*		Мау	Pang	Fontana, Mary Anne	Corporate	None	Teaching Intern	Career Readiness - Teaching/Educ	06/25/2019	6/26/2019	0	0	0	No refs entered
1 - 5	of 5 records													Prev 1 Next →



v w	Waiting for Candidate 6 ()													
Resend Candidate Email														
6	6 Candidate(s) selected													Show 10 💌 records
	Reports First Name Last Name Recruiter Division <u>Workforce</u> Position Survey Created Date Last Email References													Candidate Statue
	Reports	<u>i i screaire</u>	Last Hume	Rectarter	Division	Segment	ent Position Su		Greated Date	<u>Sent</u>	Entered	Sent	Rec'd	Sundidate Status
						Contains	♥ Contains	Contains	⊽ On ▼	⊽ On ▼				
~		Rohan	Anvikar	Moran, Alicia	Corporate	Nor Candidate	Email Status	X	06/26/2019	6/26/2019	0	0	0	No refs entered
		Elliot	Spencer	Fontana, Mary Anne	Corporate	Nor	Waiting for Candid	lates" status.	06/25/2019	6/25/2019	0	0	0	No refs entered
*		Diana	Rigg	Fontana, Mary Anne	Corporate	None	Intern	Readiness - Teaching/Educ	06/25/2019	6/25/2019	0	0	0	No refs entered
		RJ	MacReady	Fontana, Mary Anne	Corporate	None	Teaching Intern	Career Readiness - Teaching/Educ	06/25/2019	6/25/2019	0	0	0	No refs entered
*		John	Winston	Fontana, Mary Anne	Corporate	None	Teaching Intern	Career Readiness - Teaching/Educ	06/25/2019	6/25/2019	0	0	0	No refs entered
		Мау	Pang	Fontana, Mary Anne	Corporate	None	Teaching Intern	Career Readiness - Teaching/Educ	06/25/2019	6/25/2019	0	0	0	No refs entered
1 - 6 c	of 6 records													<pre> 4 Prev 1 Next ▶ → </pre>

10. A status dialog displays, confirming the bulk action that was taken. Click **OK** to close the dialog.