

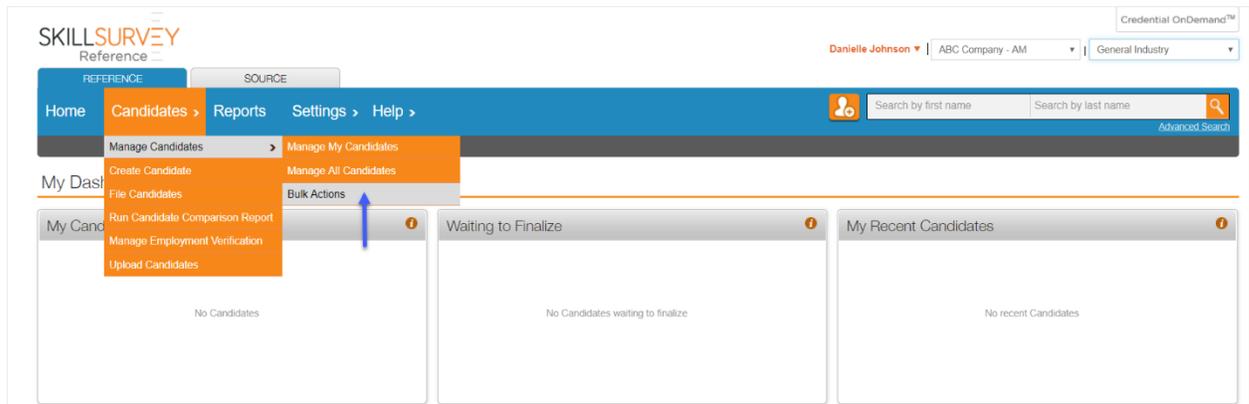
## New Bulk Actions Guide for SkillSurvey Reference

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.

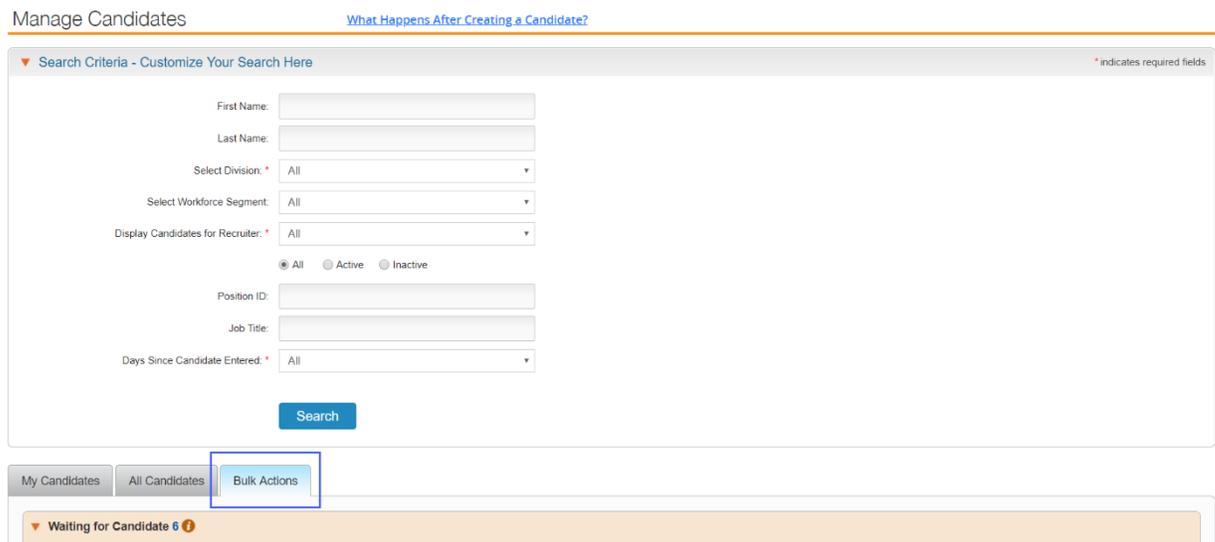
**Key things to note about Bulk Actions:** Bulk Actions can only be taken on active / in progress Candidates.

### How to take Bulk Actions:

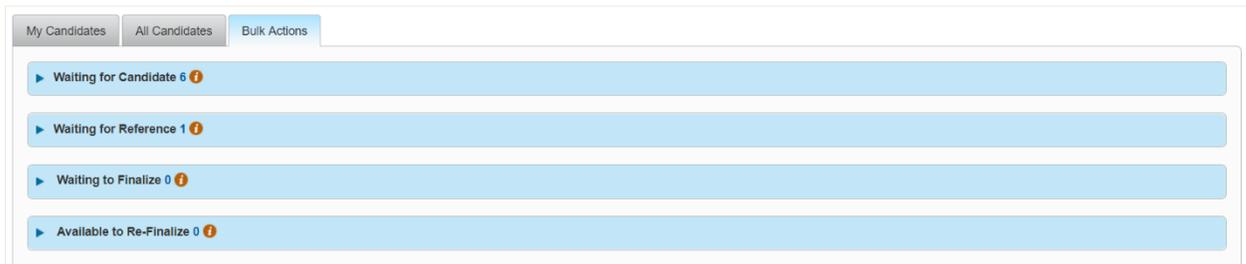
1. Go to Candidates > Manage Candidates > **Bulk Actions**.



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



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



- **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.
  - Select one, multiple, or all Candidates when performing this function

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

Reports	First Name	Last Name	Recruiter	Division	Workforce Segment	Position	Survey	Created Date	Last Email Sent	References Entered	References Sent	References Rec'd	Candidate Status
<input type="checkbox"/>	Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
<input type="checkbox"/>	John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
<input type="checkbox"/>	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
<input type="checkbox"/>	Yogesh	Flow	Badgular, Mr Dinesh	General Industry	Hourly	Pediatric	rgnertyh	07/26/2018	7/28/2018	0	0	0	No refs entered

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

Reports	First Name	Last Name	Recruiter	Division	Workforce Segment	Position	Survey	Created Date	Last Email Sent	References Entered	References Sent	References Rec'd	Candidate Status
<input type="checkbox"/>	Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
<input type="checkbox"/>	John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
<input type="checkbox"/>	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
<input type="checkbox"/>	Yogesh	Flow	Badgular, Mr Dinesh	General Industry	Hourly	Pediatric	rgnertyh	07/26/2018	7/28/2018	0	0	0	No refs entered

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

My Candidates | All Candidates | **Bulk Actions**

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Resend Candidate Email

4 Candidate(s) selected

Reports	First Name	Last Name	Recruiter	Division	Workforce Segment	Position	Survey	Created Date	Last Email Sent	References Entered	References Sent	References Rec'd	Candidate Status
<input checked="" type="checkbox"/>	Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	Jane	Same	Hartman, Averil	General Industry	Salaried	Project Manager	Construction Manager (with Safety-Related Behaviors)	08/01/2018	4/17/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	Yogesh	Flow	Badgajar, Mr Dinesh	General Industry	Hourly	Pediatric	rgtheryh	07/26/2018	7/28/2018	0	0	0	No refs entered

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

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**Resend Candidate Email**

6 Candidate(s) selected

Reports	First Name	Last Name	Recruiter	Division	Workforce Segment	Position	Survey	Created Date	Last Email Sent	References Entered	References Sent	References Rec'd	Candidate Status
<input checked="" type="checkbox"/>	Jane	Test	Fontana, Mary Anne	Healthcare	Salaried	RN	RNs	06/16/2019	6/16/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	John	Owens	Fontana, Mary Anne	General Industry	Salaried	Pediatric Nurse	RNs	01/23/2019	4/17/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	Jane	Same	Hartman, Averil	General Industry	Salaried	Project Manager	Construction Manager (with Safety-Related Behaviors)	08/01/2018	4/17/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	Yogesh	Flow	Badgajar, Mr Dinesh	General Industry	Hourly	Pediatric	rgtheryh	07/26/2018	7/28/2018	0	0	0	No refs entered
<input checked="" type="checkbox"/>	Stahma	Tarr	Vinacci, Anita	Cred	Hourly	Project Manager	rgtheryh	06/19/2018	6/19/2018	0	0	0	No refs entered
<input checked="" type="checkbox"/>	Rosalind	Wood	Fontana, Mary Anne	General Industry	Salaried	Project Manager	Project Manager	06/14/2018	6/14/2018	0	0	0	No refs entered

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

Waiting for Candidate 5

Resend Candidate Email

5 Candidate(s) selected

Reports	First Name	Last Name	Recruiter	Division	Workforce Segment	Position	Survey	Created Date	Last Email Sent	References Entered	References Sent	References Rec'd	Candidate Status
<input checked="" type="checkbox"/>	Elliot	Spencer	Fontana, Mary Anne	Corporate	None	Intern	Teaching Intern	06/25/2019	6/26/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	Diana	Rigg	Fontana, Mary Anne	Corporate	None	Intern	Teaching Intern	06/25/2019	6/26/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	RJ	MacReady	Fontana, Mary Anne	Corporate	None	Intern	Teaching Intern	06/25/2019	6/26/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>	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
<input checked="" type="checkbox"/>	May	Pang	Fontana, Mary Anne	Corporate	None	Teaching Intern	Career Readiness - Teaching/Educ...	06/25/2019	6/26/2019	0	0	0	No refs entered

**Resend Candidate Email**

Click the Continue button to send the email(s) to the 5 candidate(s) otherwise click Cancel to return with no action.

**Continue** **Cancel**

1 - 5 of 5 records

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

Waiting for Candidate 6

[Resend Candidate Email](#)

6 Candidate(s) selected Show 10 records

✓	Reports	First Name	Last Name	Recruiter	Division	Workforce Segment	Position	Survey	Created Date	Last Email Sent	References			Candidate Status
											Entered	Sent	Rec'd	
<input checked="" type="checkbox"/>		Rohan	Anvikar	Moran, Alicia	Corporate	None			06/26/2019	6/26/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>		Elliot	Spencer	Fontana, Mary Anne	Corporate	None			06/25/2019	6/25/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>		Diana	Rigg	Fontana, Mary Anne	Corporate	None	Intern	Readiness - Teaching/Educ...	06/25/2019	6/25/2019	0	0	0	No refs entered
<input checked="" type="checkbox"/>		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
<input checked="" type="checkbox"/>		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
<input checked="" type="checkbox"/>		May	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 of 6 records < Prev 1 Next >

**Candidate Email Status**

6 email(s) were sent successfully to Candidate(s) in the "Waiting for Candidates" status.

[OK](#)