



Colorado State University

# CSU Talent Management

## User Guide – Admin/Research Professional

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### Creating a Saved Search & an Applicant Spreadsheet

# Creating an Applicant Spreadsheet

1. Log into TMS at <https://jobs.colostate.edu/hr>

2. Select 'Applicant Tracking' module and 'Applicant Manager,' 'Search Committee Member' or 'EO Coordinator' User Group.



Home

Postings

| My Profile

Help

Inbox

PeopleAdmin

Watch List

APPLICANT TRACKING

Christopher Mullen, you have 2 messages.

Applicant Manager

logout (Christopher Mullen)

Welcome to your Online Recruitment System

**Inbox** (0 items need your attention)

Displaying items for group "Applicant Manager".

Postings (0)

Special Handling Lists (0)

Job Title	Type	Current State	Owner
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**Watch List** (0 items)

Postings (0)

Job Title	Type	Current State	State Owner
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Shortcuts

[My Reports](#)

My Links

**Links**

[CSU Talent Management Training Website](#)

[TMS Listserv Sign Up Form](#)

[TMS Problem or Issue? Submit Here](#)

[Your Applicant Portal](#)

(How Applicants access your PeopleAdmin system)

**Contact Information**

Human Resources - (970) 491-6947

Office of Equal Opportunity - (970) 491-5836



# Creating an Applicant Spreadsheet

Colorado State University

Inbox | PeopleAdmin

Watch List | APPLICANT TRACKING

Home | **Postings** | My Profile | Help

Admin Professional/Research Professional  
Faculty

Applicant Manager

Logout (Christopher Mullen)

Welcome to your Online Recruitment System

**Inbox** (0 items need your attention)

Displaying items for group "Applicant Manager".

Postings (0) | Special Handling Lists (0)

Job Title	Type	Current State	Owner
-----------	------	---------------	-------

Shortcuts

My Reports

My Links

Links


CSU Talent Management Training Website

TMS Listserv Sign Up Form

1. Hover over 'Postings' and either select 'Admin Professional/Research Professional' or 'Faculty'



# Creating an Applicant Spreadsheet



[Inbox](#)[PeopleAdmin](#)[Watch List](#)[APPLICANT TRACKING](#)

[Home](#)[Postings](#)[My Profile](#)[Help](#)

Christopher Mullen, you have 2 messages. [Applicant Manager](#) [logout \(Christopher Mullen\)](#)

1. Click on the title of the posting you wish to create the spreadsheet for, or search for it using the search bar.

Open Saved Search ▾

Search: 201400140P [Search](#) [More search options](#)


Ad hoc Search [Admin Professional/Research Professional](#) [Needing Chris' Approval](#)

Ad hoc Search (1 Item Found) [Save this search?](#) [Actions](#)

<input type="checkbox"/> Working Title	Posting Number	Position Number	Department	Active Applications	Workflow State	Last Updated	(Actions)
<input type="checkbox"/> <a href="#">MIP - Research Associates I, II, or III - Open Pool</a>	201400140P		Microbiology, Immunology and Pathology (1682)	124	Closed	September 01, 2015 at 12:01 AM	<a href="#">Actions</a>



# Creating an Applicant Spreadsheet




[Inbox](#) | [PeopleAdmin](#)  
[Watch List](#) | [APPLICANT TRACKING](#)

[Home](#) | [Postings](#) | [My Profile](#) | [Help](#)

Christopher Mullen, you have 2 messages. [Applicant Manager](#) [Logout](#) (Christopher Mullen)

[Postings](#) / [Admin Professional/Research Professional](#) / [MIP - Research Associates I, II, or III - Open Pool \(Closed\)](#) / [Summary](#)



## Posting: MIP - Research Associates I, II, or III - Open Pool (Admin Professional/Research Professional)

**Current Status:** Closed

**Position Type:** Admin Professional/Research Professional  
**Department:** Microbiology, Immunology and Pathology (1682)

**Created by:** Beverly Meyer  
**Owner:** OEO

[★ See how Posting looks to Applicant](#)  
[Print Preview \(Applicant View\)](#)  
[Print Preview](#)

[Summary](#) | [History](#) | [Applicants](#) | [Reports](#)

Please review the details of the posting carefully before continuing.

To take the action, select the appropriate **Workflow Action** by hovering over the orange "Take Action on this Posting" button. You may add a Comment to the posting and also add this posting to your **Watch List** in the popup box that appears. When you are ready to submit your posting, click on the **Submit** button on the popup box.

To edit the posting, click on the **Edit** link next to the **Section Name** in the **Summary Section**. This will take you directly to the **Posting Page to Edit**. If a section has an orange icon with an exclamation point, you will need to review this section and make necessary corrections before moving to the next step in the workflow.

1. Once you're in the correct posting, select the 'Applicants' tab


☒ **Posting Details**

Classification Information

Classification Title



# Creating an Applicant Spreadsheet




[Inbox](#)[PeopleAdmin](#)[Watch List](#)[APPLICANT TRACKING](#)

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Christopher Mullen, you have 2 messages. [Applicant Manager](#) [logout \(Christopher Mullen\)](#)

[Postings](#) / [Admin Professional/Research Professional](#) / [MIP - Research Associates I, II, or III - Open Pool \(Closed\)](#) / Applicant Review

**Posting: MIP - Research Associates I, II, or III - Open Pool (Admin Professional/Research Professional)**  
Current Status: **Professional**  
Position Type: **Professional**  
Department: **Microbiology and Pathology (1682)**

[See how Posting looks to Applicant](#)[Print Preview \(Applicant View\)](#)[Print Preview](#)

[Summary](#)[History](#)[Applicants](#)[Reports](#)

[Open Saved Search](#) Search:  [Search](#) [More search options](#)

Ad hoc Search ×

Ad hoc Search (124 Items Found) [Save this search?](#) [Actions](#)

← Previous 1 2 3 4 5 Next →

	First Name	Last Name	Posting Number	Job Title	Workflow State (Internal)	(Actions)
<input type="checkbox"/>	Amy		201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	<a href="#">Actions</a>
<input type="checkbox"/>	Danielle		201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	<a href="#">Actions</a>
<input type="checkbox"/>	Matthew		201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	<a href="#">Actions</a>

1. Once on the Applicants page you'll notice all the current active applicants for the search listed below. Above each column you will notice different titles (First Name, Last Name, Posting Numbers etc.) To add more columns with further information you will need to select the 'More search options' button



# Creating an Applicant Spreadsheet

Summary | History | **Applicants** | Reports

Open Saved Search ▾ Search:  Search

**Add Column:** Add Column ▾

- Please further specify the exact source where you learned about this position
- Position Type
- Primary Phone
- Ranking Criteria Score
- Reference Organization
- Reference Relationship
- Reference Title
- Secondary Phone
- Select the one (1) answer that best describes how you learned about this job opening
- Special Handling List
- State
- Status
- Submitted By
- Supervisor Name
- Supplemental question Score
- Type of Business
- Workflow State (External)
- Workflow State Entrance Reason**
- Workflow State Owner
- Zip Code

Ad hoc Search (124 Items Found)

Actions

<input type="checkbox"/>	First Name	Last Name	Posting Number	Job Title	Workflow State (Internal)	(Actions)
<input type="checkbox"/>	Amy	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Danielle	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Matthew	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Erik	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Alba	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Shane	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Jessica	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Robin	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Iara	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾
<input type="checkbox"/>	Kirsten	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾

1. Once the search options have expanded, select the 'Add Column' drop down box and scroll all the way to the bottom to include the 'Workflow State Entrance Reason' as a column.

Note: This column will include the rational for why an applicant did or did not progress in the search process. Including any other columns is up to your preference.



# Creating an Applicant Spreadsheet

Summary | History | **Applicants** | Reports

Open Saved Search ▾ Search:   Hide search options

Add Column:

Active/Inactive:

Workflow State:

Ad hoc Search

Ad hoc Search (124 Items Found) [Save this search?](#)

← Previous 1 2 3 4 5 Next →

<input type="checkbox"/>	First Name	Last Name	Posting Number	Job Title	Workflow State (Internal)	Workflow State Entrance Reason	(Actions)
<input type="checkbox"/>	Amy	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		Actions ▾
<input type="checkbox"/>	Danielle	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		Actions ▾
<input type="checkbox"/>	Matthew	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		Actions ▾
<input type="checkbox"/>	Erik	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		Actions ▾
<input type="checkbox"/>	Alba	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		Actions ▾
<input type="checkbox"/>	Shane	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		Actions ▾
<input type="checkbox"/>	Jessica	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		Actions ▾

1. Once the 'Workflow State Entrance Reason' column has been added be sure to select both 'Active' AND 'Inactive' under the 'Active/Inactive' drop down box to show both the applicants moving forward and those who have not.

To do this, select 'Active' and then while holding down the Shift button, select 'Inactive'.

2. Then click the 'Search' button.





# Creating an Applicant Spreadsheet – Saving a Search

Summary | History | **Applicants** | Reports

Open Saved Search ▾ Search:

Add Column:

Active/Inactive:

Workflow State:

Ad hoc Search (153 Items Found) [Save this search?](#) [Actions](#)

← Previous 1 2 3 4 5 6 Next →

<input type="checkbox"/>	First Name	Last Name	Requisition Number	Job Title	Workflow State (Internal)	Workflow State Entrance Reason	(Actions)
<input type="checkbox"/>	Amy	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		<a href="#">Actions</a> ▾
<input type="checkbox"/>	Danielle	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		<a href="#">Actions</a> ▾
<input type="checkbox"/>	Mathew	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		<a href="#">Actions</a> ▾
<input type="checkbox"/>	Erin	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		<a href="#">Actions</a> ▾
<input type="checkbox"/>	Jennifer	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Hired for Pool Position		<a href="#">Actions</a> ▾
<input type="checkbox"/>	Alba	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		<a href="#">Actions</a> ▾
<input type="checkbox"/>	Paul	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Application Withdrawn by HR	Other: Hired by Dr. Prenni, PMF	<a href="#">Actions</a> ▾
<input type="checkbox"/>	Shane	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee		<a href="#">Actions</a> ▾

1. Once both 'Inactive' and 'Active' have been selected, rational as to why a candidate did or did not move forward should start to populate the applicant list (as long as it was provided).

2. To save this specific search that includes the column 'Workflow State Entrance Reason' and both 'Inactive' and 'Active' for future use, select 'Save this search'



# Creating an Applicant Spreadsheet – Saving a Search

Summary | History | **Applicants** | Reports

Open Saved Search ▾ Search:  Search [Hide search options](#)

Add Column: Add Column ▾

Active/Inactive: Inactive  
Active

Workflow State: Draft  
Under Review by Dept/Committee  
Reviewed Potentials  
Semifinalist Interview Approved by EO Coordinator

2. You can check the box next to 'Make it the default search' if you wish to make it your default search for the future. This is optional.

Ad hoc Search (153 Items Found) Save this search? Actions

☐ Make it the default search?

Name Applicant Spreadsheet

1. Label the search 'Applicant Spreadsheet'.

3. Select 'Save this Search'.

Note: This search will now be saved and can be used for all of the postings you are associated with.

Previous 1 2 3 4 5 6 Next →

<input type="checkbox"/>	First Name	Last Name	First Name Number	Workflow State (Internal)	Workflow State Entrance Reason	(Actions)
<input type="checkbox"/>	Amy		201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	Actions ▾



# Creating an Applicant Spreadsheet – Saving a Search

Home | Postings | My Profile | Help

Christopher Mullen, you have 2 messages. Applicant Manager | Logout (Christopher Mullen)

Postings / Admin Professional/Research Professional / MIP - Research Associates I, II, or III - Open Pool (Closed) / Applicant Review

## Posting: MIP - Research Associates I, II, or III - Open Pool (Admin Professional/Research Professional)

Current Status: Closed

Position Type: Admin Professional/Research Professional  
Department: Microbiology, Immunology and Pathology (1682)

Created by: Beverly Meyer  
Owner: OEO

★ See how Posting looks to Applicant  
🖨️ Print Preview (Applicant View)  
🖨️ Print Preview

Summary | History | **Applicants** | Reports

Open Saved Search ▾

Search:

Add Column:

Active/Inactive:

Workflow State:

1. Your Applicant Spreadsheet search is now saved and can be opened by hovering your mouse over 'Open Saved Search' and selecting 'Applicant Spreadsheet'.

Active Applicants

🔖 Saved Search: "Active Applicants" (124 Items Found)

← Previous 1 2 3 4 Next →

First Name	Last Name	Requisition Number	Workflow State (Internal)	Application Date	(Actions)
Amy	Mullen	201400140P	Under Review by Dept/Committee	August 29, 2014 at 10:14 PM	Actions ▾



# Creating an Applicant Spreadsheet – Exporting to Excel



## Posting: MIP - Research Associates I, II, or III - Open Pool (Admin Professional/Research Professional)

Current Status: Closed

Position Type: Admin Professional/Research Professional

Department: Microbiology, Immunology and Pathology (1682)

Created by: Beverly Meyer  
Owner: OEO

★ See how Posting looks to Applicant

🖨️ Print Preview (Applicant View)

🖨️ Print Preview

Summary

History

Applicants

Reports

Open Saved Search ▾

Search:

Search

Hide search options

Add Column: Add Column ▾

Active/Inactive:

Workflow State:

Inactive  
Active

Draft  
Under Review by Dept/Committee  
Reviewed Potentials  
Semifinalist Interview Approved by EO Coordinator

1. To export your Applicant Spreadsheet to Excel, hover over the 'Actions' button then select 'Export results' from the drop down menu.

You have now created and downloaded an Applicant Spreadsheet for your search.

Note: The Excel spreadsheet will mirror the exact columns and rows that are on your TMS screen.

Active Applicants

Applicant Spreadsheet

✓ Saved Search: "Applicant Spreadsheet" (153 Items Found)

← Previous 1 2 3 4 5 6 Next →

<input type="checkbox"/>	First Name	Last Name	Posting Number	Job Title	Workflow State (Internal)	Workflow State External
<input type="checkbox"/>	Amy	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	
<input type="checkbox"/>	Danielle	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	
<input type="checkbox"/>	Matthew	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	
<input type="checkbox"/>	Erik	[REDACTED]	201400140P	MIP - Research Associates I, II, or III - Open Pool	Under Review by Dept/Committee	

Actions

GENERAL

Review Screening Question Answers

Download Screening Question Answers

Export results

BULK

Download Applications as PDF

Create Document PDF per Applicant

Actions ▾



# Need further help?

Please visit the OEO website for more resources on the CSU Talent Management System (TMS) at:

[www.oeo.colostate.edu/talent-management-system-tms](http://www.oeo.colostate.edu/talent-management-system-tms)

For additional help, contact the Office of Equal Opportunity at:  
(970) 491-5836

or

Fill out a [TMS Help Form](#)

