



Colorado State University

CSU Talent Management System

User Guide

What to do if the 'Bulk: Move in Workflow' option is missing

Why is the 'Bulk: Move in Workflow' option missing?

At times, an Applicant Manager may find that they no longer have the ability to 'Bulk Move' applicants into different workflow states. This is due to a system functionality that prevents Applicant Managers from moving applicants who are in workflow states that they do not 'own'. To get the bulk, 'Move in Workflow' option back, please see the following pages in this guide.

For a complete list of workflow states and their 'owners' in TMS, please see our additional guides linked below:

Admin Professional Workflow State Owners:

<https://oeo.colostate.edu/media/sites/144/2017/05/AP-Applicant-Workflow-State-Definitions.pdf>

Faculty Workflow State Owners:

<https://oeo.colostate.edu/media/sites/144/2017/05/Faculty-Applicant-Workflow-States-and-Definitions.pdf>



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The screenshot shows the Applicant Tracking System interface. At the top, the header includes 'Applicant Tracking System' on the left and 'Welcome, Test User My Profile Help logout' on the right. The Colorado State University logo is in the top left. A 'User Group:' dropdown menu is set to 'Applicant Manager'. The navigation bar has 'Home' and 'Postings' (with a dropdown arrow) on the left, and 'Shortcuts' (with a dropdown arrow) on the right. The breadcrumb trail reads 'Postings / Admin Professional/ Research Professional / Academic Success Coordinator (Closed) / Applicant Review'. A red callout box with the text '1. Ensure you are logged in under the Applicant Manager user group.' points to the 'User Group:' dropdown. Below the breadcrumb, there is a document icon and a list of actions: '★ See how Posting looks to Applicant', 'Print Preview (Applicant View)', 'Print Preview', and 'Add to Watch List'. The main heading is 'Posting: Academic Success Coordinator (Admin Professional/ Research Professional)'. A red callout box with the text '2. Navigate to 'Applicants' tab within the posting.' points to the 'Applicants' tab in the navigation bar. The 'Applicants' tab is highlighted with a red box. Below the tabs, there is a search bar with a 'Saved Searches' dropdown, a search input field, a 'Search' button, and a 'More Search Options' dropdown. At the bottom left, there is a 'Active Applicants' panel with a close button.

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Summary | History | **Applicants** | Reports | Associated Position Description

Saved Searches ▾ Search

Active Applicants ✕

"Active Applicants" 11 Selected records 0

Note: The default list of applicants shown on this page are 'Active Applicants'. While this default search displays all active applicants, not all 'Active Workflow States' are 'owned' by the Applicant Manager. In this situation, 'Request Semifinalist Interview – EOC' is owned by the EO Coordinator user role.

<input type="checkbox"/>	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	(Actions)
<input type="checkbox"/>	Keri		201700895AP	EOC Returned to Applicant Manager	November 08, 2017 at 02:31 PM	Actions ▾
<input type="checkbox"/>	Stasi		201700895AP	EOC Returned to Applicant Manager	November 08, 2017 at 02:54 PM	Actions ▾
<input type="checkbox"/>	Nicole		201700895AP	EOC Returned to Applicant Manager	November 08, 2017 at 06:24 PM	Actions ▾
<input type="checkbox"/>	Jacqueline		201700895AP	Request Semifinalist Interview - EOC	November 08, 2017 at 08:15 PM	Actions ▾
<input type="checkbox"/>	Erin		201700895AP	Request Semifinalist Interview - EOC	November 08, 2017 at 08:48 AM	Actions ▾
<input type="checkbox"/>	Steve		201700895AP	Request Semifinalist Interview - EOC	November 09, 2017 at 08:09 AM	Actions ▾
<input type="checkbox"/>	Amanda		201700895AP	Request Semifinalist Interview - EOC	November 09, 2017 at 11:02 AM	Actions ▾
<input type="checkbox"/>	Ken		201700895AP	Request Semifinalist Interview - EOC	November 09, 2017 at 12:01 PM	Actions ▾
<input type="checkbox"/>	Nicholas		201700895AP	Application Review, Hold	November 09, 2017 at 12:18 PM	Actions ▾

Applicant Manager 'owned' workflow states.

EO Coordinator 'owned' workflow states.

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Summary | History | **Applicants** | Reports | Associated Position Description

Note: In this situation, the EO Coordinator sent three applicants back to the Applicant Manager (EOC Returned to Applicant Manager). The Applicant Manager now needs to send them back to their previous workflow state with updated rationale.

Typically, to bulk move the three applicants, the Applicant Manager would check the boxes next to each of the individuals names, hover over actions and select 'Move in Workflow' under the 'Bulk' section. But, because the applicants shown in the list below are not all 'owed' by the Applicant Manager, the Bulk move option will be missing.

"Active Applicants" 11 Selected records 3 Clear selection?

	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date	Actions
<input checked="" type="checkbox"/>	Keri		201700895AP	EOC Returned to Applicant Manager	November 08, 2017	
<input checked="" type="checkbox"/>	Stasi		201700895AP	EOC Returned to Applicant Manager	November 08, 2017	
<input checked="" type="checkbox"/>	Nicole		201700895AP	EOC Returned to Applicant Manager	November 08, 2017	
<input type="checkbox"/>	Jacqueline		201700895AP	Request Semifinalist Interview - EOC	November 08, 2017	
<input type="checkbox"/>	Erin		201700895AP	Request Semifinalist Interview - EOC	November 09, 2017	
<input type="checkbox"/>	Erin		201700895AP	Request Semifinalist Interview - EOC	November 09, 2017	
<input type="checkbox"/>	Amanda		201700895AP	Request Semifinalist Interview - EOC	November 09, 2017 at 11:02 AM	Actions
<input type="checkbox"/>	Ken		201700895AP	Request Semifinalist Interview - EOC	November 09, 2017 at 12:01 PM	Actions
<input type="checkbox"/>	Nicholas		201700895AP	Application Review, Hold	November 09, 2017 at 12:18 PM	Actions

EO Coordinator 'owned' workflow states.

- GENERAL
 - Review Screening Question Answers
 - Download Screening Question Answers
 - Export results
 - BULK**
 - Download Applications as PDF
 - Create Document PDF per Applicant

What to do if the 'Bulk: Move in Workflow' option is missing

1. To utilize the 'Bulk: Move in Workflow' option, hover over 'Saved Searches' and select 'Bulk Move Option Missing'. Selecting this saved search will now only display workflow states that are 'owned' by the Applicant Manager. Notice how the workflow state 'Request Semifinalist Interview – EOC' disappeared from the list below.

2. Check the boxes next to the names of the individuals you wish to move, hover over 'Actions' and select 'Move In Workflow' under the 'Bulk' section.

	First Name	Last Name	Posting Number	Workflow State (Internal)	Application Date
<input type="checkbox"/>	Keri		201700895AP	EOC Returned to Applicant Manager	November 08, 2017 at 02:3
<input checked="" type="checkbox"/>	Stasi		201700895AP	EOC Returned to Applicant Manager	November 08, 2017 at 02:5
<input checked="" type="checkbox"/>	Nicole				November 08, 2017 at 06:2
<input type="checkbox"/>	Nicholas				November 09, 2017 at 12:5
<input type="checkbox"/>	Theoklitos		201700895AP	Application Review, Hold	November 09, 2017 at 12:5
<input type="checkbox"/>	Ryan		201700895AP	Application Review, Hold	November 09, 2017 at 02:0

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

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

or

email OEO at oeo@colostate.edu

