



Reference Guide JobAps - Applicant Tracking

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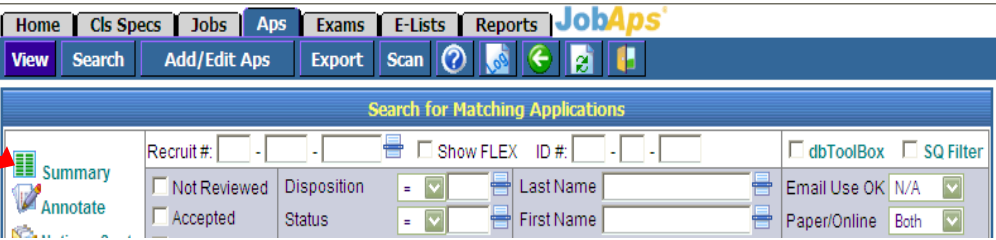
| | |
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Annotating Applications

Assigning Dispositions/Recording Notes

| Step | Action |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab.  |
| 2. | Enter your recruitment ID in the Recruit # , fields, or use the chooser to select it. |
| 3. | Click the Annotate button.  |
| 4. | Applications will be displayed in alphabetical order one at a time. Use the fields in the yellow shaded area to annotate the application and to assign a disposition to the application. |

JobAps Profile Form

Apply Date: 7/31/2014

Accept1 ☐ Reject1 ☐ Educ1 ☐ Exp1 ☐ Lic1 ☐ Loc1 ☐ Bil1 ☐ Late1 ☐ FT1 ☐ PT1 ☐ Typ1 ☐ VER1 ☐ SQ1 ☐ NI1 ☐ Spec1 ☐

Accept2 ☐ Reject2 ☐ Educ2 ☐ Exp2 ☐ Lic2 ☐ Loc2 ☐ Bil2 ☐ Late2 ☐ FT2 ☐ PT2 ☐ Typ2 ☐ VER2 ☐ SQ2 ☐ NI2 ☐ Spec2 ☐

Reviewed by: Ap Expires: Last Notice Type: Sent on:

Reject Code: CheckBox-Notice:

Notice Add:

Promotive Points: Veterans Points:

Meet MQs ☐ SQ Score: Rater Score: Ap Score: Final Score: Add Extra Points ☐ Disp: SUB Stat: AC


Notes for the:

[Add a Note for my Department](#) [Print This Application](#)

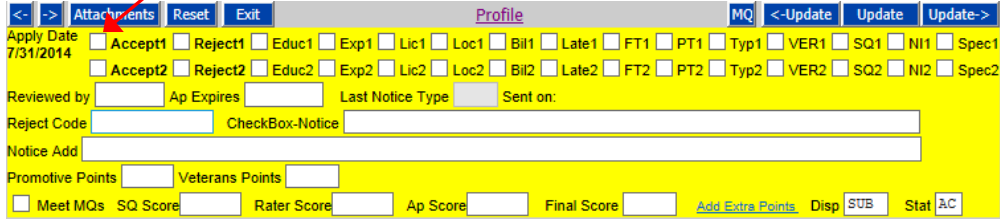
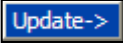
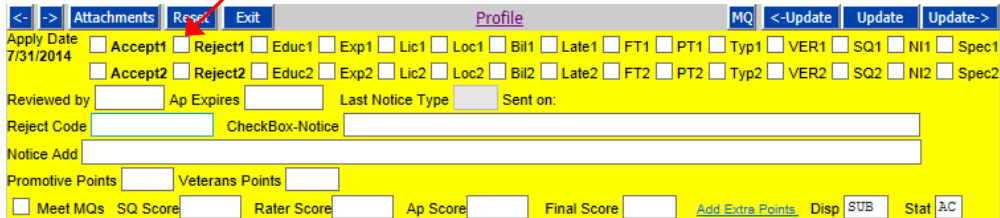
Job Title: 1220 Payroll Clerk
ADAMS
Last Name
demouser@jobaps.com
email
4904 ANY ST
Mailing address
805 123-1234
Home Phone
☐ Yes ☐ No
OK to leave msg?

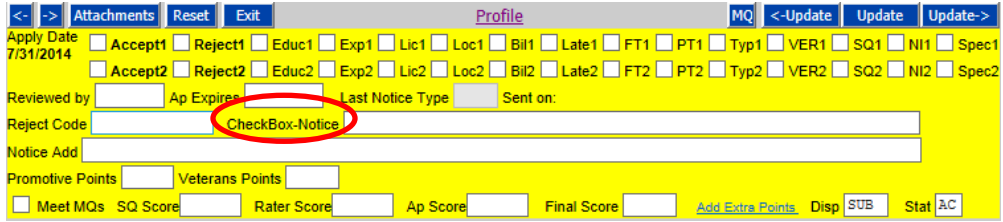
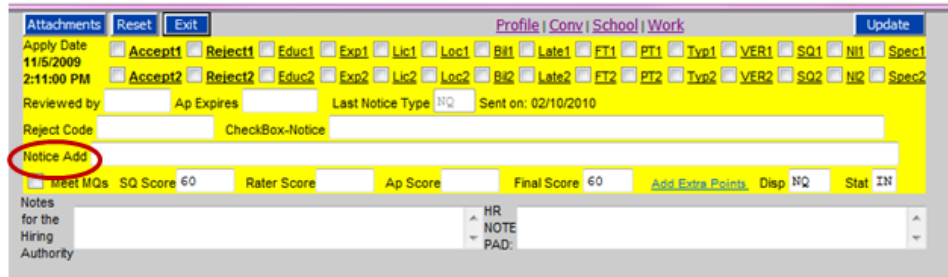
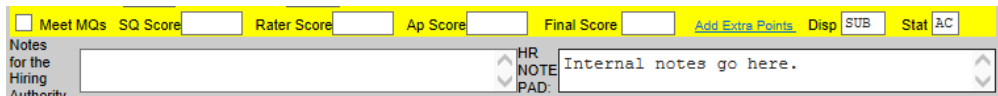
Job Number: CBT-1220-900004
APRIL
First Name
Initial
ADA-24-4904
ID
Other
Driver's License No. **SANTA BARBARA**
City
805 678-4321
Work Phone
☐ Yes ☐ No
OK to leave msg?

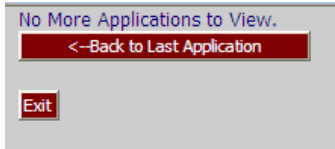
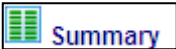
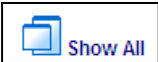
Class: CA
Expiration Date
93101
State
805 345-6789
Cell Phone
☐ Yes ☐ No
OK to leave msg?

City and County of San Francisco
Employment Application


Applicants will be required to provide necessary documentation to verify proof of legal residence entitling them to work in the United States before an appointment is made.

| Step | Action |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5. | <p>If the applicant meets the minimum qualifications, you will click the box in front of Accept1</p>  <p>When you click the Accept checkbox, the disposition (Disp) automatically changes to 'MMQ' (Meets Minimum Qualifications).</p> |
| 6. | <p>Use the Update -> button to save your annotations. The next application will be displayed after you click Update ->.</p>  <p>If you want to quit the annotate mode click the Exit button (top left) to return to the Aps → View screen.</p> |
| 7. | <p>If the applicant does not meet the minimum qualifications, you will click the box in front of Reject1</p>  <p>When you click the Reject1 box the disposition (Disp) automatically changes to 'NQ' (Not Qualified) and the status (Stat) changes to 'IN' (Inactive). You can change the disposition to something else, if appropriate.</p> <p>NOTE: You must make a manual change to the disposition AFTER checking the Reject1 box; otherwise, the disposition will revert back to 'NQ.'</p> |
| 8. | <p>If you are rejecting an application, be sure to also select the reason(s) for the rejection. Use the check boxes across the top to select the rejection reason.</p> <p>Click the box in front of each reason code that is the basis for your rejection. For example, check Educ1 if the applicant lacks the required education or Exp1 if the applicant is lacking the required experience.</p> |


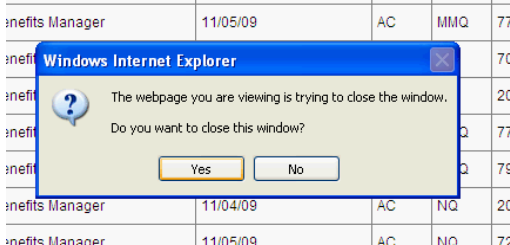
| Step | Action |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 9. | <p>Clicking on the reason will cause the Check Box Notice field to automatically populate. This is a mail merge field that can be used later for sending notices.</p>  |
| 10. | <p>To add a personalized message to a specific applicant's notice, you can use the Notice Add field. This field is also available for mail merge into notices. If you decide to use this feature, please be sure to consistently format your entries to this field. We recommend that you enter a complete sentence for each applicant, in order to ensure that all of your notices will be grammatically correct.</p>  |
| 11. | <p>If you are unsure and want to come back to review an application later, you can manually input 'AS' (Awaiting Screening) as the disposition before updating. When done reviewing all applications, you can re-review these by filtering results for "Disp = AS" in the Aps → View screen.</p> |
| 12. | <p>The Accept2 and Reject2 options will be used when a rejected application is reconsidered.</p> <p>For example, Accept2 will be selected if additional information is submitted and the application is accepted after the initial rejection.</p> |
| 13. | <p>There are two note fields on the Annotate screen. The Notes for the Hiring Manager field is for notes that can be viewed by anyone opening the application and the HR Note Pad field is for notes that only HR staff can review. The HR Note Pad note field is also a mail merge field that can be used for sending notices. It is recommended to add notes in HR Note Pad to any rejected application so that you can easily recall your review should you need to explain to the applicant why they were rejected. Note that if you use this field as a merge field to applicants, breaks in paragraphs will not show in the notice.</p>  |

| Step | Action |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 14. | <p>This window will display after you annotate the last application. You can select to return to the last application (Back to Last Application button) or click the Exit button to exit the Annotate mode.</p>  |
| 15. | <p>To view the updated dispositions, select the recruitment number and click the Summary button.</p>  |
| 16. | <p>Click the Show All button to generate a printable report of the status of the applications.</p>  |
| 17. | <p>This is the printable summary report. To print the report, use the printer icon located at the top of the page.</p> |



Recruitment #:PEX-0922-011111

| Applicant Name | Job # | Job Title | Date Applied | Stat | Disp | Final Score | Last Notice Date | Last Notice Type | A | D |
|-------------------|-----------------|-----------------------|--------------|------|------|-------------|------------------|------------------|---|---|
| APRIL ADAMS | PEX-0922-011111 | 0922 Benefits Manager | 11/04/09 | AC | MMQ | 760 | 11/04/09 | | | |
| AUGUST AUSTIN | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | IN | NQ | 790 | 11/05/09 | | | |
| DECEMBER DAVIS | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | AC | MMQ | 770 | 11/05/09 | | | |
| FEBRUARY FLETCHER | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | IN | NQ | 750 | 11/05/09 | | | |
| FORREST GIMAT | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | IN | NQ | 730 | 11/05/09 | | | |
| ELRAE GIRMA | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | AC | MMQ | 770 | 11/05/09 | | | |
| JUNE JAMES | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | AC | NQ | 700 | 11/05/09 | CON | | |
| JULY JOHNSON | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | AC | NQ | 20 | 11/05/09 | CON | | |
| JANUARY JONES | PEX-0922-011111 | 0922 Benefits Manager | 11/05/09 | AC | MMQ | 770 | 11/05/09 | CON | | |


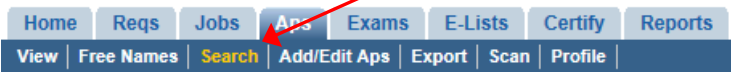


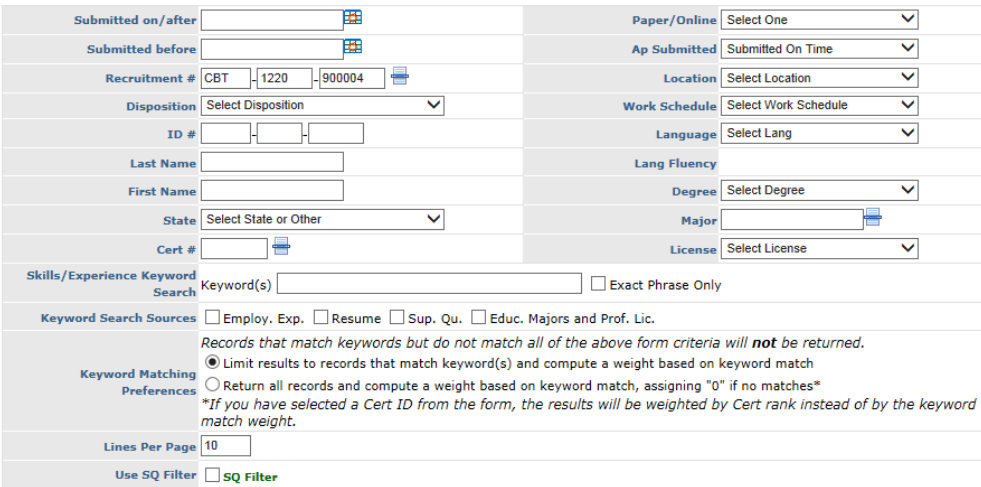


| | |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 18. | <p>When you are finished close the report. Click the Close Window button.</p>  |
| 19. | <p>Internet Explorer will ask you to confirm that you want to close the window, click the Yes button.</p>  |

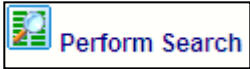
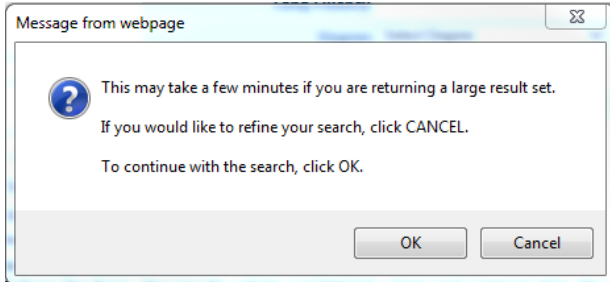


Sharing and Batching Applications

Sharing Applications with Hiring Manager

You can share a batch of applications with a hiring manager (who does not have access to JobAps or your recruitment). When you choose to share a batch of applications with someone, the system will paste the link into your default email program. You will then enter the email address of the recipient and send the message. Please note that the search result you share does not have an expiration date. However, it will not be available once you delete the search result in JobAps.

| Step | Action |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Start by going to the applications page. Click the Aps tab.  |
| 2. | Click the Search tab.  |
| 3. | Use the New Search icon to create a new batch of applications to share.  New Search |
| 4. | <p>You can use any of the data fields on this page to narrow your search for applications.</p> <p>In this example, we are using the Recruitment Number for the search. Enter your recruitment ID number, or use the chooser to select your recruitment.</p> <p> Review All Searches</p>  <p> Perform Search  Reset</p> |

| Step | Action |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5. | <p>To start the search... Click the Perform Search button.</p>  |
| 6. | <p>When this dialogue box appears you can either stop the search with Cancel or go ahead with the search using OK.</p>  <p>Click the OK button.</p> |
| 7. | <p>This is the search result. The page numbers indicate the total number of pages contained in the search. The Remove or Include column gives you the option to remove some applications that you do not want to include in the batch.</p> <p>If you use the checkboxes in the Remove or Include column then you must select the correct icon at the top of the list. You can either REMOVE ALL Checked Applications or INCLUDE ONLY Checked Applications. It may take a few minutes to filter the results down once you click one of these buttons.</p> <p>NOTE: Applications will appear on this page by the date of application. This order cannot be changed. However, the hiring manager will see the applicants in alphabetical order once the link is shared.</p> |



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Filter: Submitted On Time + R1 = 'CBT' + R2 = '1220' + R3 = '900004'
Keyword Search: ()
Search Date: 8/19/2015 5:08:00 PM

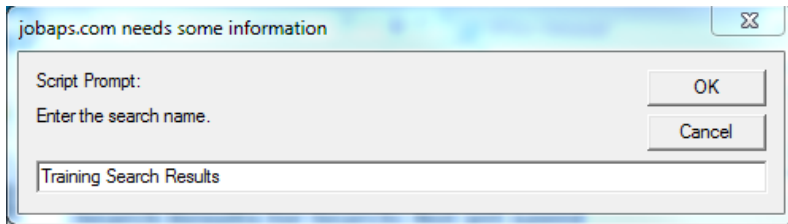
Save Result Set Close Email Applicants


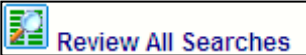
Select All Select None

Checked Applications:

Page 1 of 2 [1 2]

| Select | Wt | SQ Score | View | Date Appl | Disposition | Recruitment | email | Name |
|--------------------------|----|----------|------|-----------|-------------|---------------------------------------|---------------------|-------------------|
| <input type="checkbox"/> | 0 | | | 7/30/2014 | NQ | CBT-1220-900004 1220 Payroll Clerk | demouser@jobaps.com | PETER PARKER |
| <input type="checkbox"/> | 0 | | | 7/31/2014 | MMQ | CBT-1220-900004 1220 Payroll Clerk | demouser@jobaps.com | APRIL ADAMS |
| <input type="checkbox"/> | 0 | | | 7/31/2014 | MMQ | CBT-1220-900004 1220 Payroll Clerk | demouser@jobaps.com | JANUARY JONES |
| <input type="checkbox"/> | 0 | | | 7/31/2014 | MMQ | CBT-1220-900004 1220 Payroll Clerk | demouser@jobaps.com | APPLE QI |
| <input type="checkbox"/> | 0 | | | 8/1/2014 | MMQ | CBT-1220-900004 1220 Payroll Clerk | demouser@jobaps.com | MARCH MARTIN |
| <input type="checkbox"/> | 0 | | | 8/1/2014 | NQ | CBT-1220-900004 1220 Payroll Clerk | demouser@jobaps.com | FEBRUARY FLETCHER |
| <input type="checkbox"/> | 0 | | | 8/2/2014 | NQ | CBT-1220-900004 1220 Payroll Clerk | demouser@jobaps.com | TINKER BELL |

| Step | Action |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 8. | NEVER use the 'Email Applicants' link on this page. Sending an e-mail through this link is not tracked in the applicant's history and comes from an automated e-mail box. Therefore, candidates do not know who sent them the message and cannot respond to your notice with questions. |
| 9. | Once you have only the applications you want in the search results list save the list. Click the Save Result Set button. |
| 10. | Enter the name for your search in the text box.  Enter the desired information into the field. Click the OK button. |

| Step | Action |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 11. | <p>Close the search results page to return to the Review All Searches window.</p> <p>Click the Close button. </p> <p>Internet Explorer will ask you to confirm that you want to close the window, click YES.</p> |
| 12. | <p>Click the Review All Searches button.</p>  |






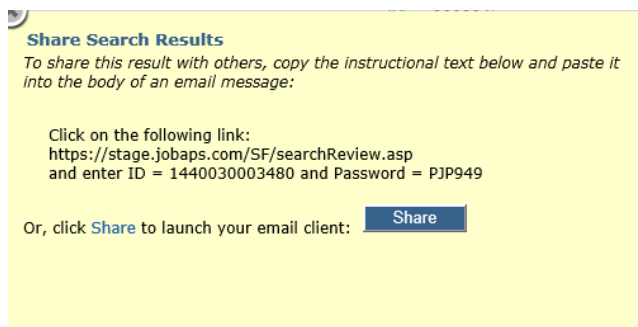
Review All Searches

| | | | |
|--------------------|----------------------|--------------|-------------------|
| Submitted on/after | <input type="text"/> | Paper/Online | Select One |
| Submitted before | <input type="text"/> | Ap Submitted | Submitted On Time |

13.

Use the icon in the **Share** column next to open a pop-up message. This message will contain a note with a link, temporary ID and password for the search result.

| Search Name | Date Created | Start Date 12:00 AM Default | End Date 11:59:59 PM Default | New Aps | Limiting Criteria (Keywords) | Share | View | Delete |
|-------------------------|----------------------|--------------------------------|---------------------------------|---------------------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|--------------------------|
| Training Search Results | 8/19/2015 5:19:00 PM | 12/1/1999 | 8/19/2015 5:19:00 P |  | Submitted On Time + R1 = 'CBT' + R2 = '1220' + R3 = '900004' |  |  | <input type="checkbox"/> |



Share Search Results

To share this result with others, copy the instructional text below and paste it into the body of an email message:

Click on the following link:
<https://stage.jobaps.com/SF/searchReview.asp>
 and enter ID = 1440030003480 and Password = PJP949


Or, click [Share](#) to launch your email client: [Share](#)

Click the **Share** button. This will open a message in your default e-mail client with the link, ID and password. You can change the subject and add additional information before sending to the hiring manager or anyone with whom you want to share these applications. It is helpful to explain to the hiring manager that attachments such as a resume are located with a paperclip icon at the top of the application, if they wish to review them.

Print this Application

Printing Instructions

Return to Table View

 File

Job Title: 1428 Unit Clerk Job Number: TPV-1428-063317

City and




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Viewing Applications







From the **Aps** tab you have various ways that you can review or process applications. Below is a brief summary of each function, followed by step by step instructions on how to filter your results.

Summary View

 **Summary** - Summary view will give you access to several functionalities. From here you can browse the on time submitted applications based on the filter criteria that you use. You can view a single application, send notices, open a new window with all applications meeting your search criteria, display notices sent to a particular application (for all recruitments of the particular application you are viewing), update individual dispositions, or launch the **Update Workset** functionality. Late or unsubmitted applications will not show in this view.







If you are inputting information to hire a TEX, PEX or TPV applicant, this is where you would set their disposition, supply their EmplID, and input the position number for which they are being hired on.

Summary View of Applicants

 Update Workset  Show All  Send Notices  Show Notes  View Ap  Print Batch


| Applicant Name | Job # | Job Title | Date Applied | Stat | Disp | Final Score | Last Notice Date | Last Notice Type | Ap Exp Date |
|----------------|-----------------|-----------------------|--------------|------|------|-------------|------------------|------------------|-------------|
| ADAMS, APRIL | PEX-0922-011111 | 0922 Benefits Manager | 12/04/2009 | AC | SW | 760 | 02/09/2010 | CAN | |
| AUSTIN, AUGUST | PEX-0922-011111 | 0922 Benefits Manager | 11/05/2009 | AC | SW | 850 | 02/09/2010 | CAN | |
| AUSTIN, AUGUST | PEX-0922- | 0922 Benefits Manager | 11/05/2009 | AC | MMO | | 02/23/2010 | SO | |

Tracking Detail For Applicant Selected From Above Summary Table

 Save Changes  Send Applicant Mail  Edit Application  Notices for this Application  Notices for this Applicant  Notices for this Recruitment

First Name Disposition Received Last Notice

Annotate View

 **Annotate** - **Annotate** view will launch a new window where you can review applications and make notes. See page 1 of this document for instructions on annotating applications.

Profile | Conv | School | Work 1 2 3 4 5 6

Apply Date ☐ Accept1 ☐ Reject1 ☐ Educ1 ☐ Exp1 ☐ Lic1 ☐ Loc1 ☐ Bil1 ☐ Late1 ☐ FT1 ☐ PT1 ☐ Typ1 ☐ VER1 ☐ SQ1 ☐ NI1 ☐ Spec1

9:48:11 PM ☐ Accept2 ☐ Reject2 ☐ Educ2 ☐ Exp2 ☐ Lic2 ☐ Loc2 ☐ Bil2 ☐ Late2 ☐ FT2 ☐ PT2 ☐ Typ2 ☐ VER2 ☐ SQ2 ☐ NI2 ☐ Spec2

Reviewed by Ap Expires Last Notice Type Sent on: 06/01/2011

Reject Code CheckBox-Notice


Notice Add

☐ Meet MQs SQ Score Rater Score Ap Score Final Score 766 [Add Extra Points](#) Disp Stat



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Notices Sent View

 **Notices Sent** - **Notices Sent** view will launch a new window with a summary of all of the notices sent that match your search criteria. Please note, this does not pull merge field values into the notices; it will only display the templates themselves and the date and time the notice(s) were sent.

Notice Report for : Recruitment: PEX-0922-011111 Submitted Ontime; 0922 Benefits Manager;

Notice Type: CON - Confirmation Ontime Sent on: 11/4/2009 3:03:00 PM

Notice:

Message:

Dear |#FirstName (917)| |#LastName (916)|,


Your application for |#Job Title (982)|, recruitment |#JobNumber (981)|, in the City and County of San Francisco was received on |#DateAppl (463)|.

The filing deadline for this job is |#JobDeadline (989)|.

Additionally, displayed at the bottom of each notice template is information regarding which applicants were sent that particular notice in the same batch.

| ID | socsecno | RecruitNum | dateappl | lastname | firstname | noticetype | batchID |
|-----------|-----------|---------------|------------------------|----------|-----------|------------|---------|
| ada240003 | 123000003 | PEX0922011111 | 12/4/2009 4:52:14 PM | ADAMS | APRIL | CAN | 249020 |
| aus871111 | 000065154 | PEX0922011111 | 11/5/2009 12:08:38 PM | AUSTIN | AUGUST | CAN | 249020 |
| dav210005 | 000065161 | PEX0922011111 | 11/13/2009 12:35:08 PM | DAVIS | DECEMBER | CAN | 249020 |
| fle990002 | 000065198 | PEX0922011111 | 11/5/2009 2:47:42 PM | FLETCHER | FEBRUARY | CAN | 249020 |

Count Aps

 **Count Aps** - **Count Aps** will display the number of applications that match your search criteria. If you wish to view only submitted or on time applications, you **MUST** indicate this criteria in the search box. Otherwise, you will get the count of all applications which will not match the number of on-time applications for your recruitment.

Search for Matching Applications

Recruit # CBT 1823 984612 ☐ Show FLEX ID # - - - ☐ dbToolBox ☐ SQ Filter

☐ Not Reviewed ☐ Accepted ☐ Rejected

Disposition = Last Name From To

First Name City State Country

Zip = Zip <=

Final Score >= Final Score <=

Expires >= Expires <=

Display Group: of size

Submitted on or after Submitted before

Choose Action

Submitted Yes ☒ Deadline Ontime ☒

☐ Exclude Aps On-File ☐ Exclude Practice Aps ☐ Include Deactivated Aps


Number of records: 36

This count includes all submitted and unsubmitted and ontime and late applications unless you have entered other criteria in the form above.



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Score Aps

 **Score Aps** - **Score Aps** will allow you to enter or edit score data for the applications that match your search criteria. **Please note: JobAps no longer supports this functionality, and therefore your results when using ScoreAps are not guaranteed to be consistent. You should use exam rows to process scores in JobAps. Score Aps should ONLY be utilized for inputting Promotive and/or Veterans Preference points.**


 Save Scores  Restore Original Scores

Modify as

— OR —

| Easy ID | name | Written Exam | Performance Exam | Online Written | Oral Board Interview A | Score5 | Score6 | Final | Career Credits | Promotional Points | Veterans Points | SQ Score | Comp | Rounded | Extra Pts | Final | R |
|-----------|----------------|--------------|------------------|----------------|------------------------|--------|--------|-------|----------------|--------------------|-----------------|----------|------|---------|-----------|-------|---|
| ada240003 | ADAMS, APRIL | 11 | | | | | | | | | | 760 | | | | 760 | |
| aus871111 | AUSTIN, AUGUST | 15 | | | | | | | | | | 790 | | | | 850 | |
| aus871111 | AUSTIN, AUGUST | | | | | | | | | | | | | | | | |

View Aps

 **View Aps** - **View Aps** will open a new window where you can view applications along with related information. You can use the **View Previous** and **View Next** navigation buttons, or print individual applications from this new window. The printing option through **Annotate** view is much cleaner than printing through **View Aps** as Annotate doesn't include the header information seen below.

[View Previous](#) [View Next](#) ☐ Invalid-No Upload [Print this Application](#)

Name: ADAMS, APRIL SSN / EzID: 123-00-0003 / ADA-24-0003
Job Title: 0922 Benefits Manager Job Number: PEX-0922-011111
Date of Submission: 12/4/2009 4:52:14 PM Filing Deadline: Continuous

The applicant has agreed to send each of the following items:

No items are required to be sent by mail, upload, fax or e-mail.

Employment Standards Review


| Job Title | Job Number | Accept1 | Reject1 | Accept2 | Reject2 | Notice |
|-----------------------|-----------------|---------|---------|---------|---------|--------|
| 0922 Benefits Manager | PEX-0922-011111 | | | | | |
| 0922 Manager I | PEX-0922-011112 | | | | | |

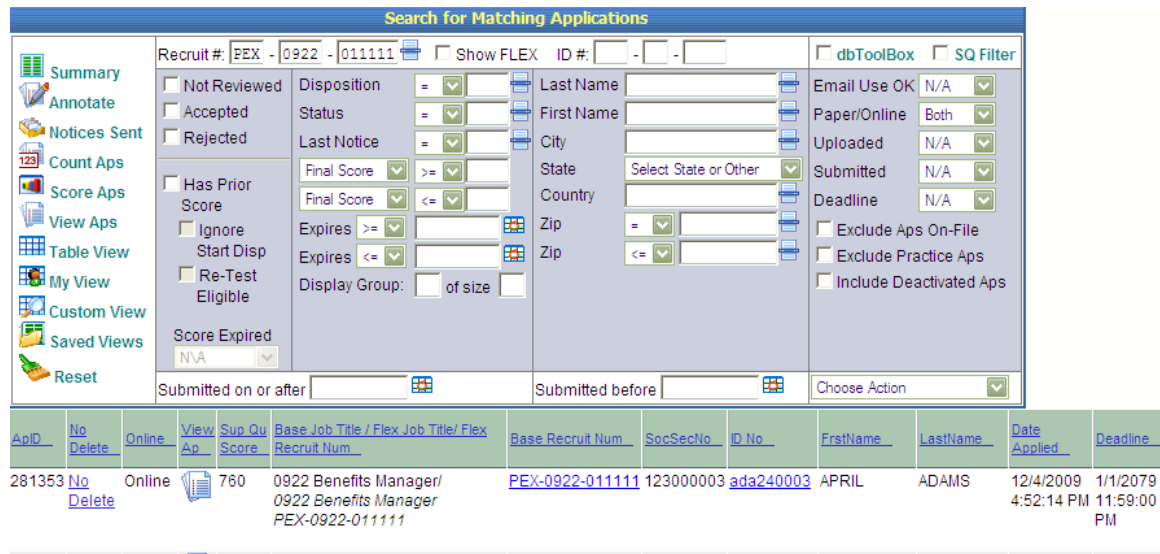
| | | |
|----------------------------------|-----------------------------|----------------------------------|
| Job Title: 0922 Benefits Manager | Job Number: PEX-0922-011111 | City and County of San Francisco |
| ADAMS | APRIL | ADA-24-0003 |
| demouser@jobaps.com | Other | Employment Application |
| email | Driver's License No. | State |
| Class | Expiration Date | |




Reference Guide JobAps - Applicant Tracking

Table View

 **Table View** - **Table View** allows you to view applications that are submitted, not submitted, on time, and not on time. Your data set is presented in a table format. You can view application information found in the Profile and School sections of the online application. (Scroll the screen horizontally to view several additional data fields.) **This view is best utilized for finding applicants who claim to have submitted an application, but their application does not appear in your candidate pool.** You can determine through this view if an applicant started, but did not submit an application.



| ApID | No Delete | Online | View Ap | Sup Ou Score | Base Job Title / Flex Job Title/ Flex Recruit Num | Base Recruit Num | SocSecNo | ID No | FrstName | LastName | Date Applied | Deadline |
|--------|-----------|--------|-------------------------------------------------------------------------------------|--------------|--------------------------------------------------------------------|------------------|-----------|-----------|----------|----------|----------------------|-----------------------|
| 281353 | No Delete | Online |  | 760 | 0922 Benefits Manager/ 0922 Benefits Manager PEX-0922-011111 | PEX-0922-011111 | 123000003 | ada240003 | APRIL | ADAMS | 12/4/2009 4:52:14 PM | 11/1/2079 11:59:00 PM |

My View

 **My View** Create a custom view called “**My View**” through **Reports → Custom View**.


Creating a My View will allow you to quickly and easily view a report of the information you consider most important or frequently search.

(You must first use the **Custom View** function below to save your custom view as a “My View” template.)

Note: My View will return LATE submitted applications in your search results unless you filter these out. Late applications will have no disposition.



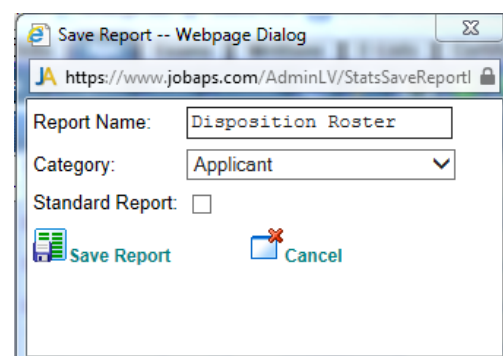
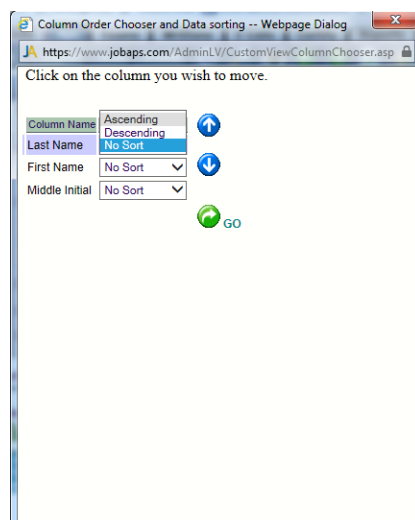
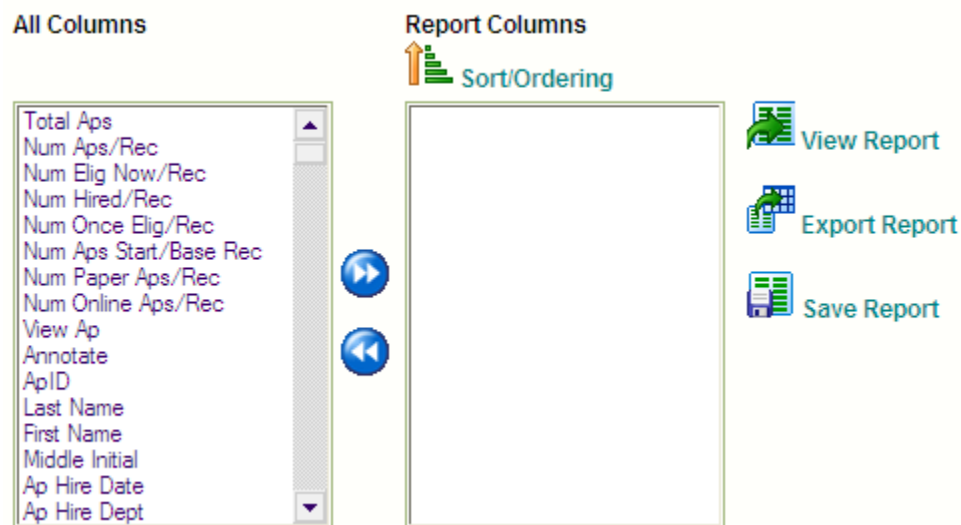
Custom View

 **Custom View** - **Custom View** allows you to select database fields and the order of those fields for reporting purposes. Simply move the data fields from the **All Columns** box to the **Report Columns** box. You can also change the sort/order, view your report, export the report to another format, or save the report.

Saved reports are located in the Reports tab under “My Applicant/Job Reports.”

To create a **My View** as indicated on the previous page, save the report as “My View” in the Save Report dialog box. Limit your My View report to about 10 fields.

NOTE: Checking Standard Report makes the report available for all to use. If you are creating a report for only your view, please *do not click “Standard Report”* as it will make the actual reports for all users more difficult to find.





Saved Views



Saved Views - **Saved Views** displays all saved custom views for renaming, deleting, reviewing, etc. Depending on your account access, you may see reports created by other users in your department.

Manage Saved Custom View Reports

View Report

Export Report

Rename Report

Delete Report

| Name | Author | Category | Create Date |
|-----------------------|------------|---------------|-------------|
| 0942 Risk Mgmt Scores | ada.dupree | Applicant 6/5 | |
| ADA_ADDRESSES_DISP | ada.dupree | Applicant 3/2 | |

Query:
select Distinct ApProfile.FrstName as [First Name], ApProfile.LastName as [Last Name], JobView.JobTitle as [Job Title], ApReview.NormScore as [SQ

Reset


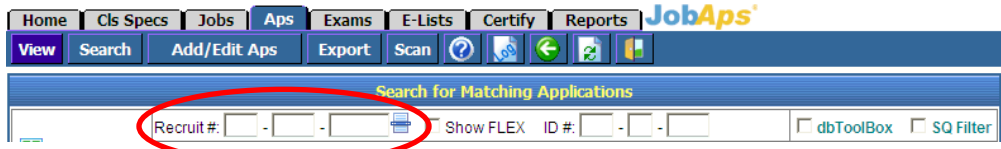

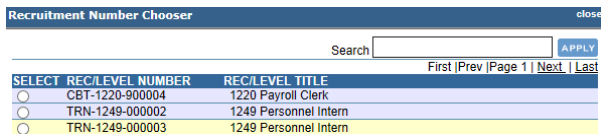


Reset **Reset** will clear all of your filter criteria in the search form, allowing you to start fresh. This is often useful if you are not finding information that you expect to see in the system. Sometimes a filter has been placed that is not obvious.

Filtering Applications



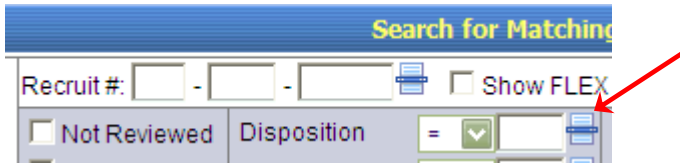
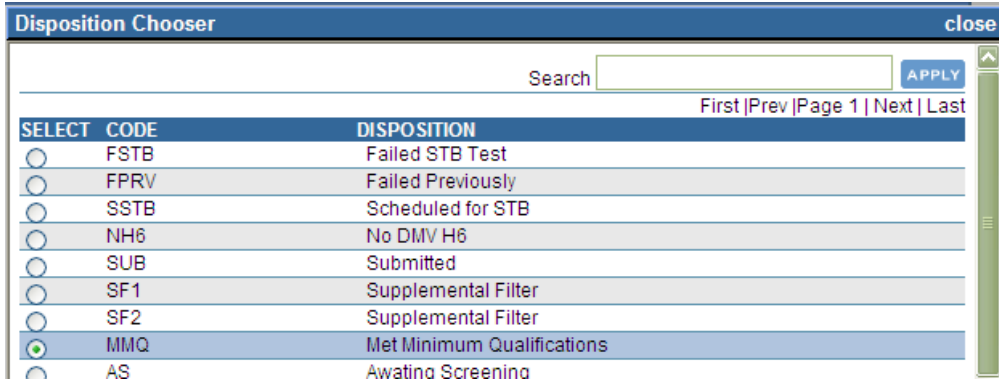
Filtering Applications by Recruitment Number

This is the basic view you use when you want to view submitted applications for a particular recruitment.


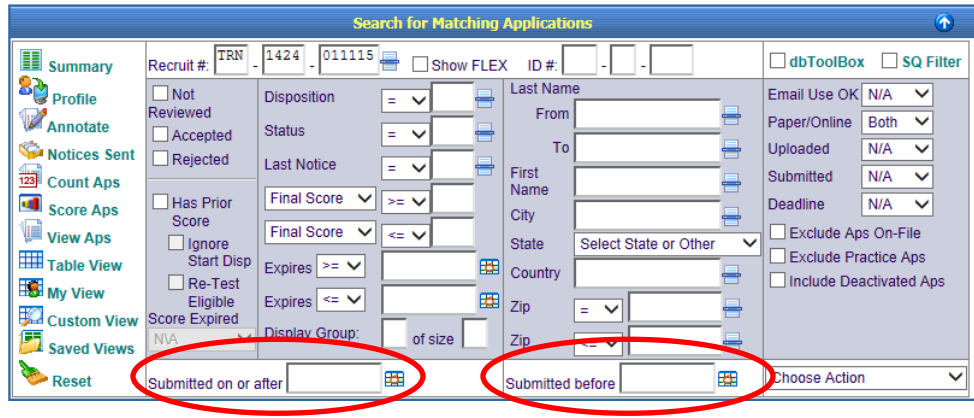

| Step | Action |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab.  |
| 2. | To select your recruitment, enter the recruitment ID, or use the chooser to locate the recruitment you would like to work with.  |
| 3. | You can either enter in one or all of the fields of the recruitment number, or you can click the Chooser icon. Recruit #: <input type="text"/> - <input type="text"/> - <input type="text"/>  |
| 4. | If using the chooser, enter search criteria into the following screen and choose the recruitment for which you wish to search for applications.  Click the bubble on the row of the recruitment you wish to search. Then, click the SELECT button at the bottom of the window. |
| 5. | If you do not fill in all three fields of the recruitment number, the system will search for all applications matching the fields you entered. For example, only indicating "1241" as the job code will return all 1241 applications you have clearance to view, including permanent, exempt and provisional recruitments. Indicating "TEX-1241" as the first two fields will return all 1241 applications submitted for temporary-exempt recruitments. |
| 6. | You can then select the appropriate action from the Aps tab navigation options to view, annotate, count or create reports on applications matching your filter criteria. |

Filtering Applications by Disposition


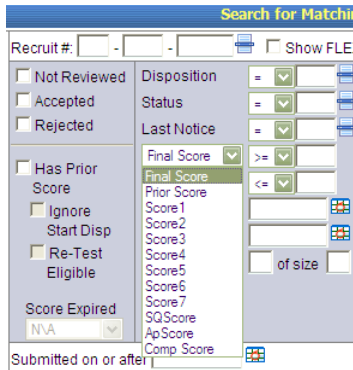
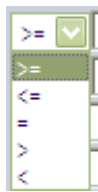
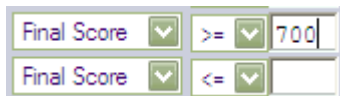
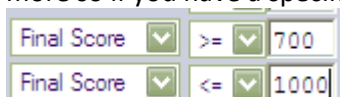
Beyond filtering by recruitment and viewing all applications, you can filter your recruitment to return all applicants under the same disposition.

| Step | Action |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab.  |
| 2. | Enter the recruitment ID either manually or by using the chooser.  |
| 3. | Type in the Disposition or use the chooser to select the disposition of the applications you want to view.   Click the bubble on the row of the recruitment you wish to search. Then, click the SELECT button at the bottom of the window. |
| 4. | You can then select the appropriate action from the Aps tab navigation options to view, annotate, count or create reports on applications matching your filter criteria. |


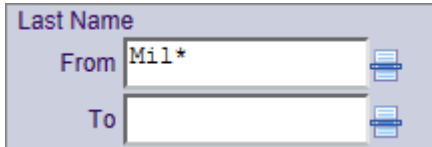
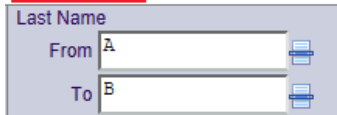
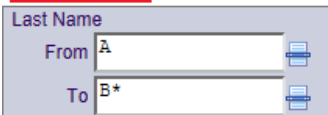

Filtering Applications by Date Ranges

| Step | Action |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab. |
| 2. | <p>Enter the recruitment ID either manually or by using the chooser.</p>  |
| 3. | <p>Determine what start date to use for your date range. Note that the cutoff time for the day is 11:59 pm, <u>NOT</u> 5:00 pm.</p>  |
| 4. | <p>Enter the starting date of the date range you want to use into the Submitted on or after field.</p> <p>You can also select the date by clicking the calendar icon and selecting the date.</p>  |
| 5. | <p>Determine the day <u>after the last date</u> of the date range you want to use. Enter this date into the Submitted before field. For example if you want all applications submitted up to 10/18/2014, you would enter <u>10/19/2014</u> in this field.</p> |
| 6. | <p>You can then select the appropriate action from the Aps tab navigation options to view, annotate, count or create reports on applications matching your filter criteria.</p> |


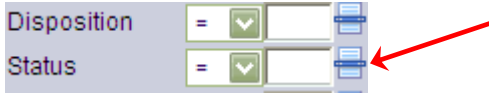
Filtering Applications by Score Ranges

| Step | Action |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab. |
| 2. | Enter the recruitment ID either manually or by using the chooser.  |
| 3. | Select the score field data that you wish to filter by from the drop down menu of the first Score dropdown. On default, this dropdown is indicated as "Final Score."  |
| 4. | Click the Score Field Qualifier list to select the appropriate qualifier symbol.  |
| 5. | Click the Score Field and enter the desired score you want to use.  |
| 6. | Click the 2nd Score Field list and repeat steps 3-5 to enter the other score criteria you want to use. (This step is not required if you want to go as high as possible, but more so if you have a specific range.)  |
| 7. | You can then select the appropriate action from the Aps tab navigation options to view, annotate, count or create reports on applications matching your filter criteria. |

Filtering Applications by Name

| Step | Action |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab. |
| 2. | <p>Enter the recruitment ID either manually or by using the chooser.</p>  |
| 3. | <p>Click in the Last Name field. If searching for a single applicant, type in their entire last name in the "From" box. If you only know a partial spelling of their name, start the search with as much information as you know for sure and end with an asterisk (*), known as a <i>wildcard</i>. Note that using this method will return all applicants starting with the letters indicated, so you might end up with more than one applicant returned.</p>  <p>To search for a range of last names: Fill in the "From" box with where you want the filter to begin. In the "To" box fill in where you want the filter to end. Use the asterisk (*) wildcard in the "To" box if you want all applicants starting with the criteria input.</p> <p>See below: Example I will return all last names starting with the letter A (and anyone with the last name of <i>exactly</i> "B." In Example II, the search will return <i>all</i> applicants with last names starting with A <u>and</u> <i>all</i> applicants with last names starting with B.</p> <div style="display: flex; justify-content: space-around;"> <div style="text-align: center;"> <p>EXAMPLE I</p>  </div> <div style="text-align: center;"> <p>EXAMPLE II</p>  </div> </div> |
| 4. | <p>Click in the First Name field to enter the first name of the applicant. Like the Last Name field, if you do not know a full first name, you can use the asterisk (*) wildcard to search for all names starting with the letters you input.</p>  |
| 5. | <p>You can then select the appropriate action from the Aps tab navigation options to view, annotate, count or create reports on applications matching your filter criteria.</p> |


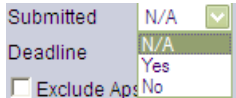


Filtering Applications by Status

| Step | Action |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab. |
| 2. | Enter the recruitment ID either manually or by using the chooser.  |
| 3. | Select the status to review by using the Chooser button next to the Status field.  <p>There are only two possible statuses to choose: AC - Active IN – Inactive</p> |
| 4. | You can then select the appropriate action from the Aps tab navigation options to view, annotate, count, etc. matching your filter criteria. |

Viewing Unsubmitted Applications

An Unsubmitted Application is one where the applicant starts an application for a specific recruitment, but does not complete the submission process.

Please note that unsubmitted applications will not display under the **Summary View**. You can only view/access the unsubmitted applications by using **Table View**, as indicated below.

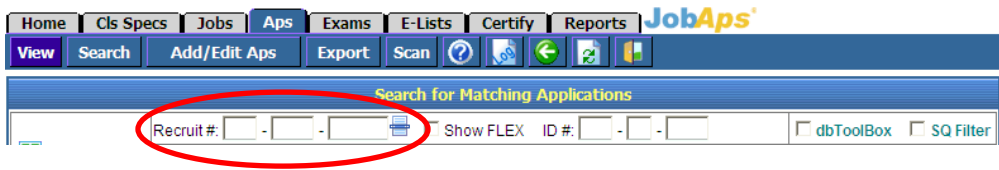


| Step | Action |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab. |
| 2. | Enter the recruitment ID either manually or by using the chooser.  |
| 3. | Click the Submitted dropdown button to activate the menu, and select 'No' from the Submitted dropdown box to see applications that were not submitted.  You can also keep submitted as N/A to get a full list of applicants if you wish to determine if a specific candidate applied or not. |
| 4. | To view unsubmitted applications for recruitment, click the Table View button.  Table View |
| 5. | A list of all unsubmitted applications will be listed. You can also view the applications if necessary, in this view by clicking the  symbol. |
| 6. | JobAps does not support sending notices to unsubmitted candidates. If you need to send an e-mail to unsubmitted candidates (for example if the recruitment is being cancelled and you want to inform anyone who started an application), use table view and copy and paste the entire table into an Excel spreadsheet. Then narrow down the Excel document to the e-mail column only. Copy and paste the e-mail addresses in this column into Outlook. <i>Applicants should be BCC'd and no more than 20 applicants should be e-mailed at a time to avoid spam filters.</i> |


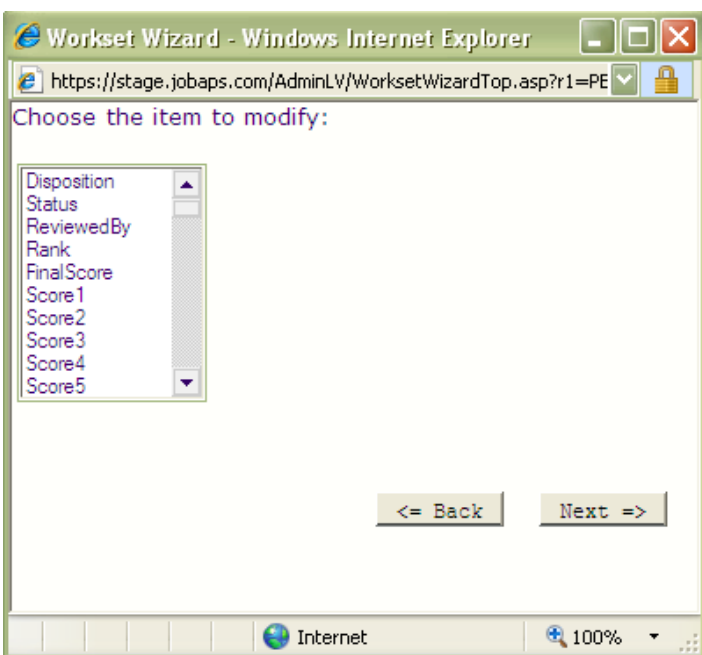
Using Update Worksets

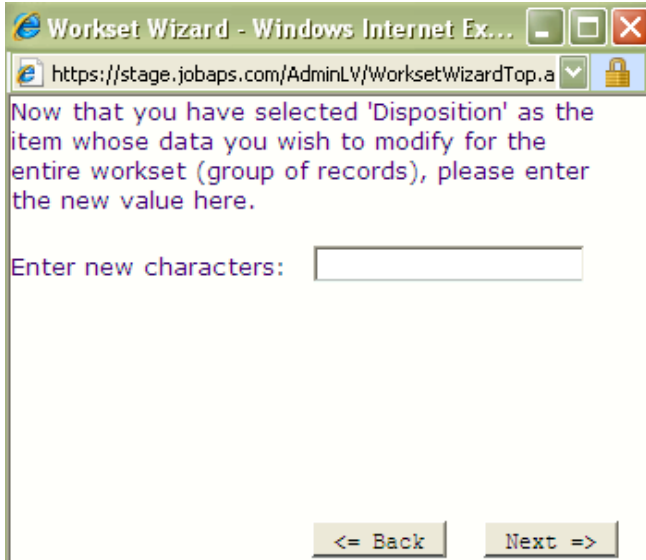
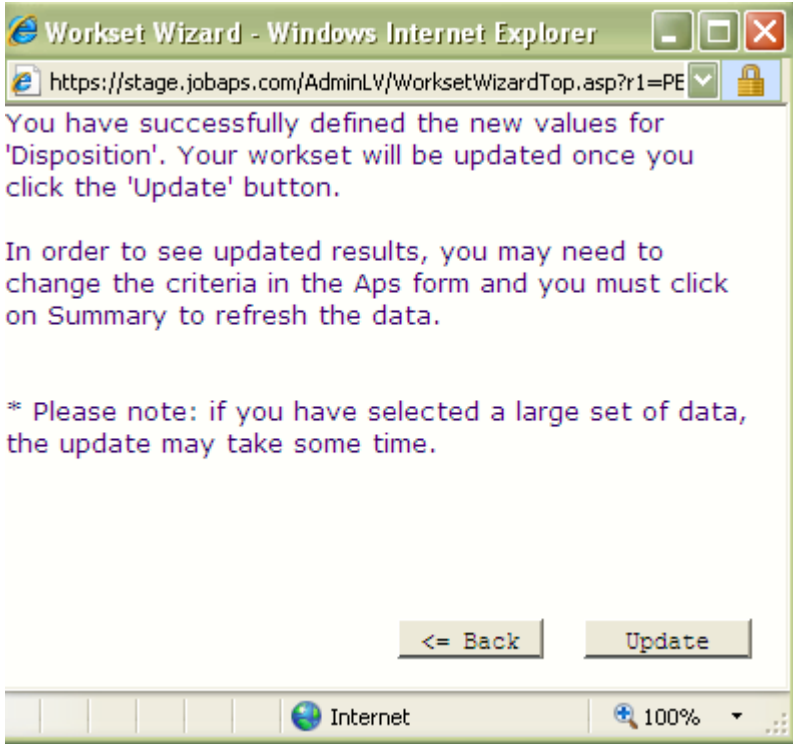
Updating Worksets by Groups

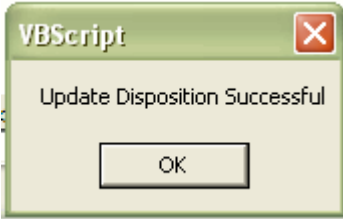
You will learn how to update a specific application field for a group of applications (workset) such as disposition, score, and status.

Please note: This is an extremely powerful tool that also requires great care. Any change you make with the **Update Workset** impacts *every application* that matches your filter criteria, so **check your list of applicants closely** to make sure that you are working with the correct applications before updating. Once you have completing the update process, the changes cannot be reversed.

| Step | Action |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab. |
| 2. | <p>Enter the recruitment ID either manually or by using the chooser.</p>  |
| 3. | <p>Enter any additional filtering criteria you would like to use, and click the Summary button.</p>  <p>The group of applications with your selected criteria displays in the lower part of the screen.</p> <p>Important: Check the candidates to ensure that they meet the criteria you filtered. If something is wrong, change the filter criteria, click Summary again and re-check the results. <u>If you only change the filter criteria, but do not re-click the Summary button your changes will affect all applicants in your original search.</u></p> |
| 4. | <p>To make a mass change to all the applications in the list (the Workset), click the Update Workset button.</p>  |

| Step | Action |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5. | <p>The Workset Wizard window displays as shown below. Read the text across the top of the screen. When you are ready to begin, click Start =>.</p> <p>This wizard is used to modify the same item for the entire workset (group of records.) The first step will be to identify the item you would like to change. Next you can either assign a value to the item, or use the expression builder to create new calculated values. Last you will be given the opportunity to preview what the new value will look at before running the update.</p>  |
| 6. | <p>Select the field you wish to update from the available list and click Next =>.</p> <p>If you wish to make multiple update workset changes to the same group of applicants, including disposition, it is recommended to change <i>disposition</i> <u>last</u> so that you don't lose the group of applicants for additional changes.</p>  |

| Step | Action |
|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7. | <p>Enter the new value that you wish to apply to the workset, and click the Next => button.</p>  |
| 8. | <p>When you are ready to make the change to all the applications in the Workset, click the Update button.</p>  |

| Step | Action |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 9. | <p>This window confirms the update. Depending on the size of your applicant pool, this process may take a few minutes. Do not close your Internet Explorer while this step is processing. Click the OK button to return to the Aps tab.</p>  |
| 10. | <p>If you have additional changes to make to the exact same group of applicants, repeat steps 4-9 before moving away from the Summary View page.</p> <p>In order to see the applications with your updated criteria you must refresh the data.</p> <p>In this example, you would need to enter the new value in the field (disposition in our sample), then click the Summary button again.</p> |



Reverting Application(s) to Unsubmitted

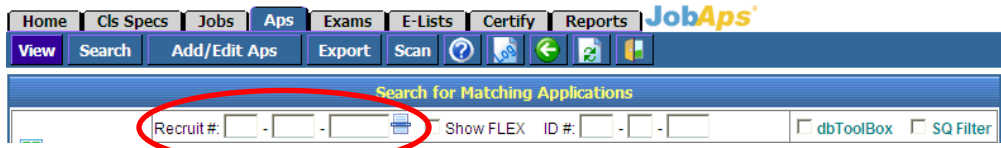
You will learn how to revert applications to unsubmitted through this process. This function is *only available to analysts* and can only be performed during the filing period. **Applications cannot be reverted to unsubmitted outside of the filing period.**

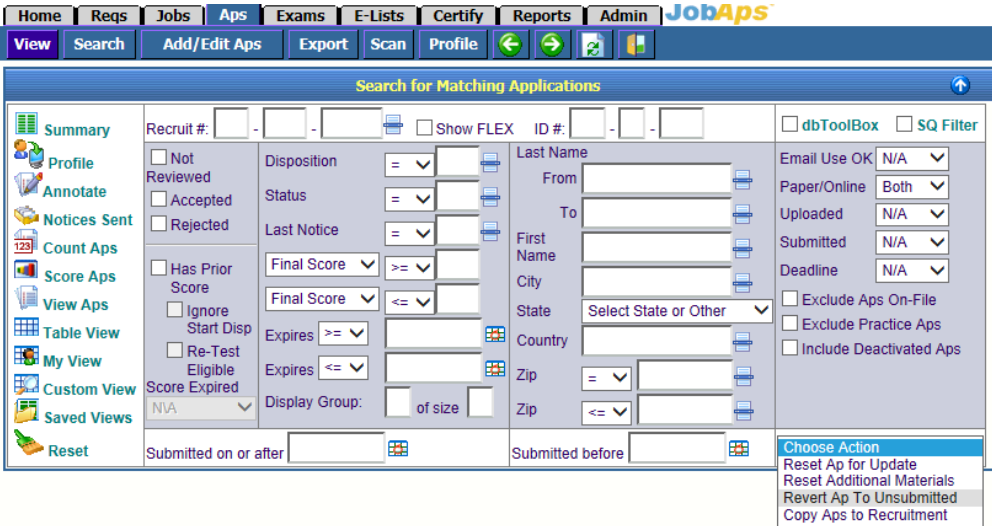
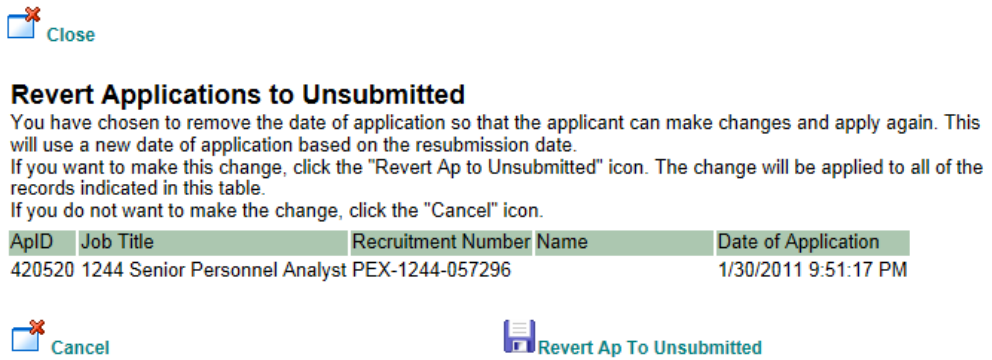
Additionally, reverting an application back to unsubmitted will not reset the application if you made an error such as a mistake on the supplemental or forgetting to include the “Other” tab for attachments.

Reverting applications to unsubmitted is up to the analyst of the recruitment. Remember that all applicants in a recruitment must be treated equal, so if you decide to allow one person’s application to be reverted for updating, then any other applicant who makes the same request must also be given the same opportunity.

Additionally, the applicant will have confirmation of their original submittal. To keep a paper trail of the request, you should make the applicant put their request to be reverted back to an unsubmitted state **in writing** and explain that they must re-submit by the filing deadline or their application will not be included in the recruitment process.

BE VERY CAREFUL TO ONLY UNSUBMIT THE INTENDED APPLICATION(S). THIS CHANGE IS IRREVERSIBLE.

| Step | Action |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Click the Aps tab. |
| 2. | Enter the recruitment ID either manually or by using the chooser.  |
| 3. | Enter filtering criteria into the first and last name fields. Click on Summary view. |
| 4. | Check the results and ensure that you only received the ONE applicant you want affected. If additional applicants were returned, you will need to provide additional filtering criteria such as application date to narrow down the search to just the one candidate you want. Continue filtering and clicking on Summary view until you only find the one applicant listed. |

| Step | Action | | | | | | | | | | |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-----------|----------------------|------|---------------------|--------|-------------------------------|-----------------|--|----------------------|
| 5. | <p>In the bottom corner of the “Search for Matching Applications” box, select the dropdown that states “Choose Action.” Select Revert Ap to Unsubmitted.</p>  | | | | | | | | | | |
| 6. | <p>A pop-up screen will appear asking you to confirm that you want to revert the application to unsubmitted. Check this page one last time to make sure you have not accidentally included additional applicants. If you did, close the window and start over. If your results are okay, click on Revert Ap to Unsubmitted.</p>  <p>Revert Applications to Unsubmitted</p> <p>You have chosen to remove the date of application so that the applicant can make changes and apply again. This will use a new date of application based on the resubmission date.</p> <p>If you want to make this change, click the "Revert Ap to Unsubmitted" icon. The change will be applied to all of the records indicated in this table.</p> <p>If you do not want to make the change, click the "Cancel" icon.</p> <table><tr><th>ApID</th><th>Job Title</th><th>Recruitment Number</th><th>Name</th><th>Date of Application</th></tr><tr><td>420520</td><td>1244 Senior Personnel Analyst</td><td>PEX-1244-057296</td><td></td><td>1/30/2011 9:51:17 PM</td></tr></table> | ApID | Job Title | Recruitment Number | Name | Date of Application | 420520 | 1244 Senior Personnel Analyst | PEX-1244-057296 | | 1/30/2011 9:51:17 PM |
| ApID | Job Title | Recruitment Number | Name | Date of Application | | | | | | | |
| 420520 | 1244 Senior Personnel Analyst | PEX-1244-057296 | | 1/30/2011 9:51:17 PM | | | | | | | |
| 7. | <p>Print the confirmation page for your records.</p> <p>It is advisable to re-check your application pool the day before the filing deadline to check if the candidate has re-applied and contact them to remind them that they need to re-submit if they have not done so.</p> | | | | | | | | | | |