

Non-Posting Manager Process

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Introduction

This user guide explains the accessibility for the Non-Posting Manager role. This user has access to manage applicants within their assigned business unit(s) or assigned job listing(s). They do not have job posting abilities.

Home Page

You will be taken directly to your default homepage. Select the different icons across the top and in the **Gear icon** to navigate through the system.



Applicants

In this section you are able to **view**, **status**, **manually add**, **edit** and **add notes** to applications for jobs in your assigned department(s).

Search for applicants using the **All Applicants** tab or the **Applicants by Job** tab. Use the drop-down menus to filter which applicants you view or to determine how applicants are sorted. You can change any filter criteria and click **Filter** to update the results. Active, qualified Applicants for the last 90 days will show by default. By clicking the **Show Sent Emails** box, you can view which email templates have been sent to the applicants displayed. Status applicants individually, or en masse, from this screen.

Phoenix Holdings Applicant Dashboard

All Applicants Applicants By Job Incomplete Apps

All Department All Jobs All Administrators

All Statuses Qualified Active

Job Question Score Above... 03-Dec-2018 03-Mar-2019 Show Sent

Emails Filter

Displaying 1 - 2 of 2 Total Candidates

Name	Date	Job Title	Internal ID	Score	Met BQ	Assessment	Candid	Avg Rating	Status
1. Ellis, Tirone Manually Added App Invite	21-Feb-2019	DOT Truck Driver			Yes			☆☆☆☆	
2. Cano, Javier Manually Added	29-Jan-2019	Warehouse Worker	Long Application	Yes				☆☆☆☆	Hired

Select All - Select None

Using the **Applicants by Job** tab allows you to review applicants by Job. Click **View** to open a dashboard for a specific job. Check the **Show Conversion Data** box to display conversion percentages for each job.

Phoenix Holdings Applicant Dashboard

All Applicants Applicants By Job Incomplete Apps

Job Title/Job ID Internal ID All Department All Administrators Active

Last 30 Days Show Conversion Data Show Custom Fields Filter

Displaying 1 - 2 of 2 Total Jobs

Job Title	Department	Internal ID	Applicants	Qualified	Needs Review
Junior PHP/MySQL Programmer/Developer American Fork, UT - Full Time	IT		1	1	1
Accounting Clerk - Part Time American Fork, UT - Full Time	Finance	Utah	3	3	0
Totals			4	4	1

Displaying 1 - 2 of 2 Total Jobs

Click the Job Title or click the **View** button to the left of the job listing to view applicants. Use the dropdowns to filter which applicants you view or to determine how applicants are sorted. Use the **Add Applicant** option to manually add an applicant to the job, if you have been granted access to do so.

Phoenix Holdings Applicants

Junior PHP/MySQL Programmer/Developer - American Fork, UT

Start: 21-Mar-2018 End: 20-May-2022

Department: IT

All Statuses No Status Active

Active Statuses Reviewed Left Voicemail

Show Sent Emails 21-Mar-2018 20-Sep-2018 Filter

Displaying 1 - 5 of 5 Total Candidates

Name	Date	Score	Met BQ	Avg Rating	Status
1. Turner, Oliver	12-Sep-2018	46	Yes	☆☆☆☆	
2. Broughton, Riley	27-Jul-2018	44	Yes	☆☆☆☆	BGC / Drug Test Requester
3. Fielding, Daisy	21-May-2018	54	Yes	☆☆☆☆	
4. Petersen, Max	21-Mar-2018	53	Yes	☆☆☆☆	Hired
5. Conner, Darlene	21-Mar-2018	38	Yes	☆☆☆☆	

Select All - Select None

Displaying 1 - 5 of 5 Total Candidates

Manage Selected Applicants Action Spotlight Update Status Change Archive Assign Users

Email Thank You Page Integration

Click **Action>View** to go into an individual applicant record.

1. Applicant Filter:

Use this section to filter results, similar to filtering on the main applicant pages. Adjust the filters and click the **Filter** button.

2. Applicant Profile Information:

This section shows the applicant's contact information. Click(**edit**) to edit the applicant's profile information. This will change the information for EVERY application for this applicant.

If enabled, **choose a star to rate the applicant**

3. Application Information:

This area will look different, depending on the features enabled on your account. Click on the tabs and labels to navigate through the application information.

If any integrations are enabled on your account, you will be able to click on the tabs and initiate other functions like background checks, assessments, onboarding, etc.

4. Action Buttons:

When viewing the application, you will find buttons at the upper right to do different tasks.

- **Follow:** This feature allows any user to "follow" an application. Users who follow an application receive an email notification whenever another user updates the status or makes notes on that application.
- **Send Message:** Text or Email the applicant.
- **Add Note:** Add a note on the application, or add a note and change a status simultaneously.
- **Print:** Print the application.
- **Action:** Includes a variety of other actions you can do with the application record, some features are optional.

5. Application Status:

You can status an individual application using the **Application Status** drop-down menu. If you hover over any given status, and if the status has an assigned description, the description will appear to help you determine the appropriate status selection.

The screenshot displays the application record for Kiersten Malone. The top navigation bar includes buttons for 'Follow', 'Send Message', 'Add Note', 'Print', and 'Actions'. The main content area shows the application details, including the job title 'Accounting Clerk - Part Time - American Fork, UT' and the source 'Employee Referral - Kiersten Malone APPLIED ON: Mac'. The 'Application Status' dropdown menu is open, showing a list of statuses. The 'Not Selected' status is highlighted, and a red box is drawn around it. The 'Not Selected' status has a description: 'This person previously worked for the company and is not eligible to be hired again.' The dropdown menu also lists other statuses such as 'Reviewed', 'Left Voicemail', 'Interview Requested', 'Ex-Employee - Rehirable', 'Phone Interview Scheduled', 'Phone Interview Completed', 'In-Person Interview Scheduled', '1st Interview Completed', '2nd Interview Completed', 'Interview Cancelled / No Show', 'Not Qualified', 'BGC / Drug Test Requested', 'BGC / Drug Test Didn't Clear', and 'BGC / Drug Test Didn't Clear'.

6. Application Tags:

Application tags are a way to quickly see pertinent information about an application at a glance. Tags appear as colored bubbles and include Notes, Messages, specific Integrations, completing an App Invite, etc.

7. Timeline:

This area tracks any changes to the application, including notes, actions and emails/texts sent. There are 3 different views of Timeline/Other Applications. An Admin user can contact the Support Team to change the view for all users in the organization.

8. Other Applications:

This area displays any other applications this candidate has submitted.

9. Help Center:

There are 3 different ways to use the **Help Center** to quickly find answers to your questions.

- **Need Help?:** Begin typing any word or phrase to search our entire Help Center.
- **Common Questions:** Click this button to see a filtered list of commonly searched articles based on the page you're on.
- **Featured Articles:** Click any of the featured article buttons to see the most commonly searched articles based on the page you're on and your user type.

Applicant Filter: 1

Petersen, Max (edit) 4 0 followers Follow Send Message Add Note Print Actions

APPLICATION STATUS: Hired

21-Mar-2018 Junior PHP/MySQL Programmer/Developer - American Fork, UT

SOURCE: Indeed APPLIED ON: Mar

Application Job Questions Integrations eforms

Summary Employment History Education Resume References

Employment History

PROCOMPUTERS

JOB TITLE: Summer Internship - Technician

DATES EMPLOYED FROM: Jun/2017

DATES EMPLOYED TO: Aug/2017

EMPLOYMENT LENGTH: 0 years, 2 months

RATE OF PAY: 25.00

DUTIES: Provided technical support and troubleshooting on Desktops, Laptops, and Mobile Devices to clients in-person, over the phone, through Remote Desktop, and others. Resolved hardware and software conflicts through either troubleshooting or replacement. Replaced malfunctioning hardware in both Desktops and Laptops

REASON FOR LEAVING: Summer Internship

MAY WE CONTACT?: Yes

Education

College or University

Name: University of Southern Mississippi

Location: Hattiesburg, MS, UNITED STATES

Graduated? Yes

Years Attended: 4

Degree: Bachelor Of Science In Computer Science

Major: Computer Science

Address: Gulfport, MS UNITED STATES

Phone: 000-000-0000

Supervisor Name: Pete Sample

APPLICATION TAGS

Notes Messages References eform App Invite

TIMELINE

Show: Notes Actions Emails/Texts

HR Data Survey by Kristine Hull | 01-Jun-2018

Survey Title: New Hire Paperwork Checklist

Score: Flagged? N

Note by Kristine Hull | 17-May-2018

Notes score continued.

Score: Best

Emailed by System Generated | 26-Apr-2018

Sent the Thank You Email - First Stage - Automatically Sent email template at 9:38:50 am.

OTHER APPLICATIONS

TEST HR Generalist - Bilingual English/Spanish

01-Jun-2018 - Copied Application

Archived

Account Manager - Sales Representative

01-Jun-2018 - Copied Application

Archived

View All (3)

Need Help? Search the FAQ here process applicants message applicant

Review the [How do I process applicants? FAQ](#) for more information.

Link to Job Info

An arrow icon is displayed next to the Job Title within the application record. This enables you to quickly access details from the **Job Listing** and **Requisition** (if applicable). Hover over the arrow icon to see basic details from the **Job Listing**.

Dolan-Williams, Laceshanna (edit)

OTHER APPLICATIONS (0)

No other applications to display.

13-Oct-2015 | Loan Processor I - American Fork, UT

SOURCE: Company Website

Job ID: 285162 Internal ID: 179 Location: American Fork, UT

Department: Central Loan Processing Employment Type: Full Time

End Date: 08-Nov-2015 Internal Application: Internal Application

External Application: Main Application Indeed: Current

Click the arrow icon to open a separate preview page with the **Career Site Description** and **Job Details**. If the job listing is linked to a Requisition, an additional section called **Job Requisition Details** section is also displayed.

Loan Processor I - American Fork, UT

Career Site Description

Bank of Mt. Bankerton, one of Utah's premiere community banks, is hiring a Loan Processor in the American Fork office.

Responsibilities: Provide clerical and administrative support needed to process and close customer loans; prepare loan documents and book loans when signed and returned; file loan documents with appropriate agencies; process construction draw checks; follow-up with the loan officer to determine status.

Requirements: One to two years of similar or related experience.

We offer competitive pay based on experience, excellent full benefit package, paid time off and holiday pay.

Schedule: Monday-Friday, 8am - 5pm.

Equal Opportunity Employer Female/Minority/Disability/Veteran

Job Details

Job Location: American Fork, UT

Start Date: 08-Oct-2015

End Date: 08-Nov-2015

Number of Positions: 1

Pay Rate: Competitive

Pay Type: Hourly

Benefits: We offer competitive pay based on experience
excellent full benefit package
paid time off and holiday pay.

Department: Central Loan Processing

Classification: Pizza Party

External Application Setup: Main Application

EEO Job Category: Administrative Support Workers

Job Requisition Details

Hiring Requisition Form

Addition to staff:	No
Replacement:	Yes
If yes, who is being replaced?	
Salary Range:	14.10 starting
Specific Work Schedule:	M-F 8-5
Can these requirements be assigned/performed by another area? Why/why not?	No, position requires preparation of loan documents.
Education Level:	High School Degree
Prior related experience:	Prior Loan experience preferred. See above description

Job Cost/Benefit Analysis

Measurement Description #1 - Is a full-time or part-time employee needed?	Full-Time
Hours per week?	40
Measurement Description #2 - What job responsibilities/work load is required to justify the FTE in addition to cover peak time?	Growth of the Bank.
Measurement Description #3 - A. Review existing reports to measure current needs from past years trends. Have the needs of this current position increased or decreased and if so, how does that justify the hiring for the position?	Analysis was completed and due to the increase in loan production it is recommended that we add to our department.
(See sample measurement criteria for report information. Please hold the CTRL button and click here to open in a new window.)	

Increase in Staff Only

Description of additional duties and outputs:	
Summarize benefit or advantage of this hire to your department and the bank.	
Costs:	
(One year salary, benefits, supplies, etc.)	
Estimated total annual cost:	

Jobs

In this section, you are able to view the job listings in your assigned **department(s)**.

Click on the gray **Action** button to the left of the Job Title and select **View** to open the job description that applicants see when applying for jobs. You can also use the **Action** button to the left of the job listing to View Applicants, Manually Add Applicants (optional), or to run Source, Status or Job Questions Reports. Check the **Show Conversion Data** box to display conversion percentages for each job. Use the dropdowns to filter which applicants you view or to determine how applicants are sorted.

Use the **Add Applicant** option to manually add an applicant to the job, if you have been granted access to do so. You can also find mass update options at the bottom of the page. Click **Action** and **View** to open up an individual's application.

Phoenix Holdings - Jobs Dashboard

Job Listings All Applicants Requisitions

Job Listings represent your current job openings. The Start and End dates represent when the job is active on your career site. If a job opening is no longer active on your career site, the "Closed" tag will show next to the job title. Use the filters below to narrow down your list of job openings.

Job Title/Job ID Internal ID All Department All Administrators Active Filter

Displaying 1 - 5 of 5 Total Jobs

Job Title	Start Date	End Date	Department	Internal ID	Apps
Warehouse Worker	09-Aug-2018	08-Aug-2022	Operations	Long Application	1
DOT Truck Driver	29-May-2018	28-Jul-2022	Operations		0
Account Manager - Sales Representative	11-Apr-2018	10-Jun-2022	Sales		3
Junior PHP/MySQL Programmer/Developer	21-Mar-2018	20-May-2022	IT		6
Accounting Clerk - Part Time	13-Feb-2018	14-Apr-2022	Finance	Utah	11

Displaying 1 - 5 of 5 Total Jobs

Click on the **All Applicants** tab to view and status a list of all applicants for all of the job postings in your assigned department(s). Use the dropdowns to filter which applicants you can view, click the refresh button to view these applicants.

My Account

In this section, you are able to view and edit your account information. If you would like to update/change your username and/or password for the isolated Hire system you can type in the new username/password in the directed field(s) and then click on **Save Changes**.

You can also set your default landing page/s in this area. For more information, review the [Editing My Account/Profile](#) user guide.

Account Details

User Profile Bookmarks Calendar Connect

HR Assistant
Last Successful Login: 05-Mar-2019

User Profile

Here you can edit your personal information, change your password, and update any other information related to your account.

User Settings

Username* HRAssistant@applicantpro.com ✓

Email* HRAssistant@applicantpro.com

Password Last Changed: 05-Mar-2019

Update My Password

Time Zone* Mountain Standard Time (MST -7)

Set Your Login Screen

Applicants Dashboard

Send Inbox Messages as Emails

Contact Information

First Name* Last Name*

HR Assistant

Business Phone Business Ext

Cell Phone 801.310.4340

Address

Country/Territory* State/Province

United States Utah

City Zip/Postal Code

Applicant Dashboard Settings

Set Applicant Dashboard Landing Page

All Applicants

Default Assigned User

All Administrators

Jobs Dashboard Settings

Set Jobs Dashboard Landing Page

Job Listings

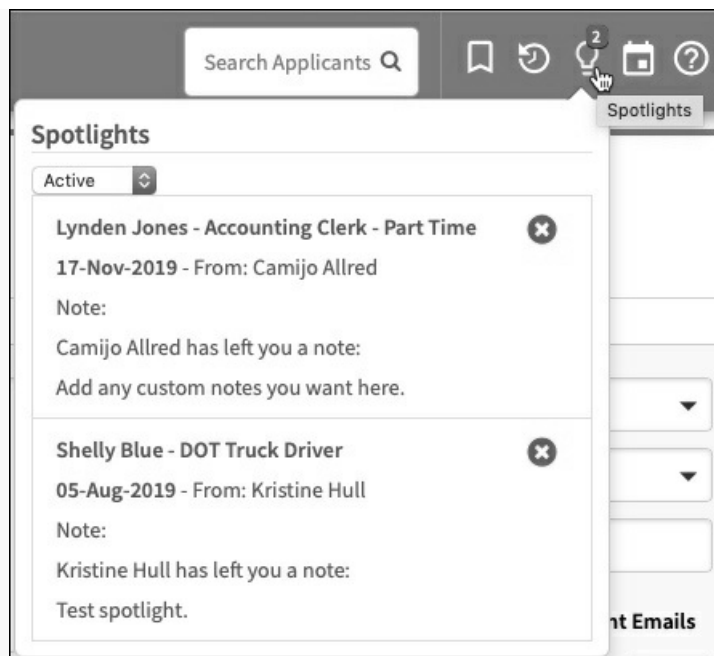
Save Changes

Date: 05-Mar-2019

Need Help? Search the FAQ here Common User Profile Questions

My Spotlights (optional)

The **Lightbulb** icon will show any applicants that have been **spotlighted** for you by other users in your organization. You can view **active** and/or **inactive** spotlights by clicking the arrow next to **Active**. Click on each listed applicant to open their application. (If you do not have Spotlights turned on, but would like to try using them, contact your Admin and they can request that feature be turned on.)



Incomplete Apps Tab (optional)

Admin users can limit access to the **Incomplete Apps** tab for each manager. Assigned users do not have access to view the Incomplete Apps tab. If you have access to this tab, review the Incomplete Applicants Tab User Guide for more information.

Communication Inbox

Review the Communication Inbox user guide or video for information on this feature.

Requisitions (optional)

If you have Requisitions enabled on your account, refer to the Creating Requisitions user guide for additional information.

Common Questions

Why would I make a user a Non-Posting Manager?

Non-posting managers are the most common user type. They are often hiring managers who make input on hiring decisions, but do not post jobs or have access to do so. Managers have access to applications based on departments or job listings they have been assigned.

Can I restrict a manager to access by job listing instead of departments?

Yes. An Admin user can request this feature be enabled on your account. Refer to the user guide on Assign Managers by Job, Instead of by Business Unit for more information on this feature.

What is the difference between a Non-posting manager and an Assigned User?

Both non-posting managers and assigned users, as well as admins and posting managers, essentially have the same access to applications. Once they pull up an application you will see similar options in Actions, Timeline, and application information. A manager's access is different based on how many applications they have access to, as they are restricted based on department. An assigned user only gets access to applications they are specifically assigned.