

Guide to Applicant Tracking System



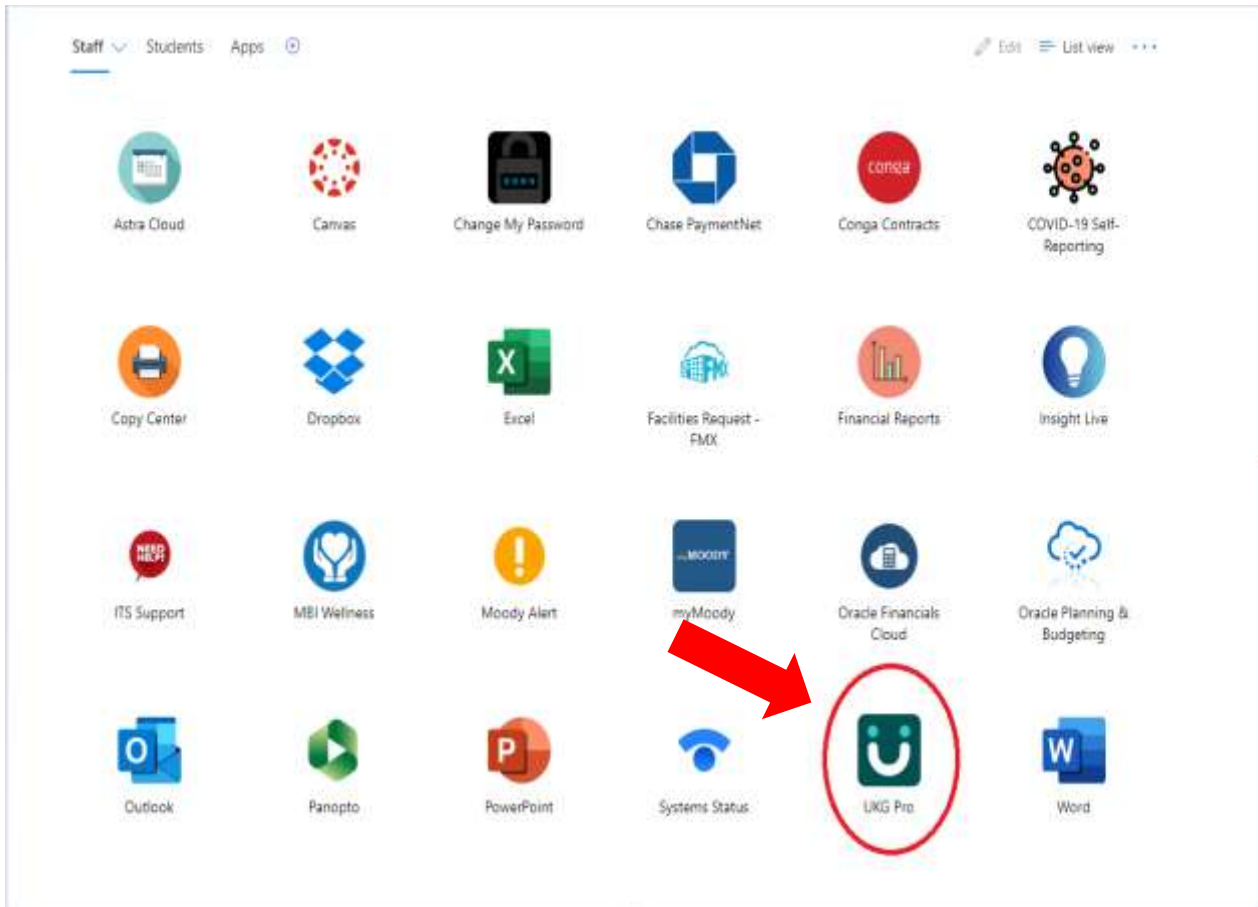
The purpose of this document is to provide hiring managers a visual step-by-step guide to view applicant information within UKG Pro Recruiting. If you have difficulty, or what you view does not resemble the screen shots provided, please contact your recruiter.

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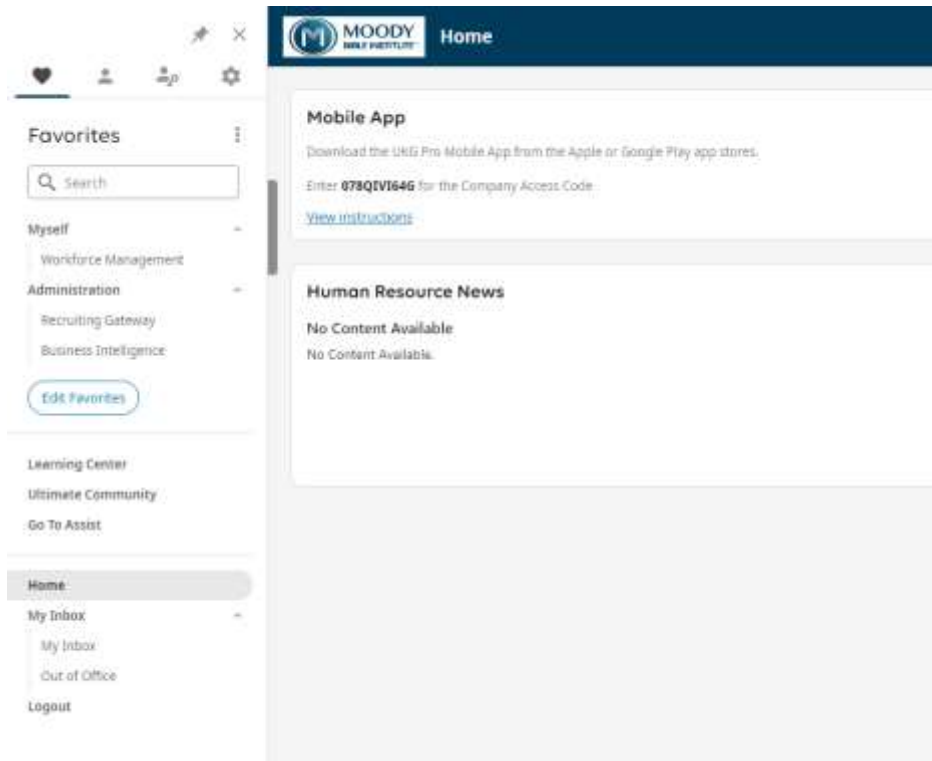
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To start UKG Pro:

1. Begin by opening an Internet Browser.
2. Go to: <https://myapplications.microsoft.com/> Bookmark this site for future use.
3. On the site, click on **UKG Pro** (shown in the screenshot below).



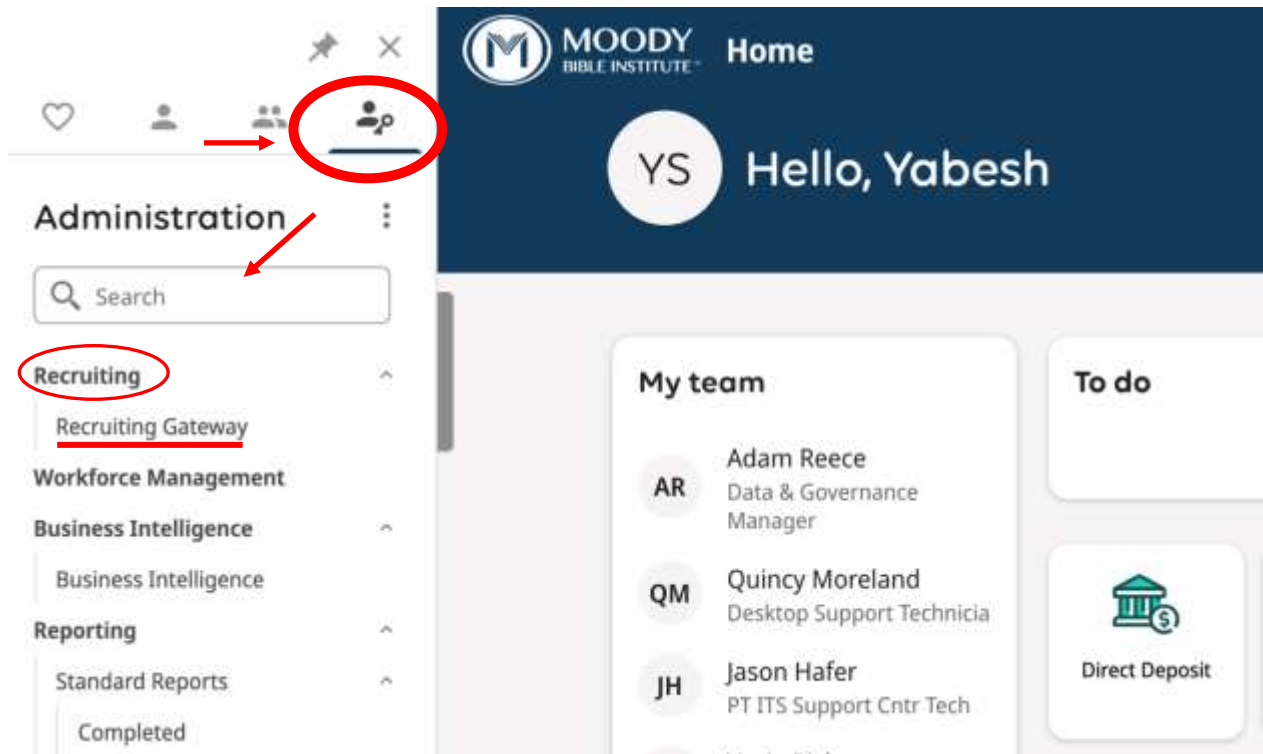
This will take you to the “Main Menu” of UKG Pro as shown below:



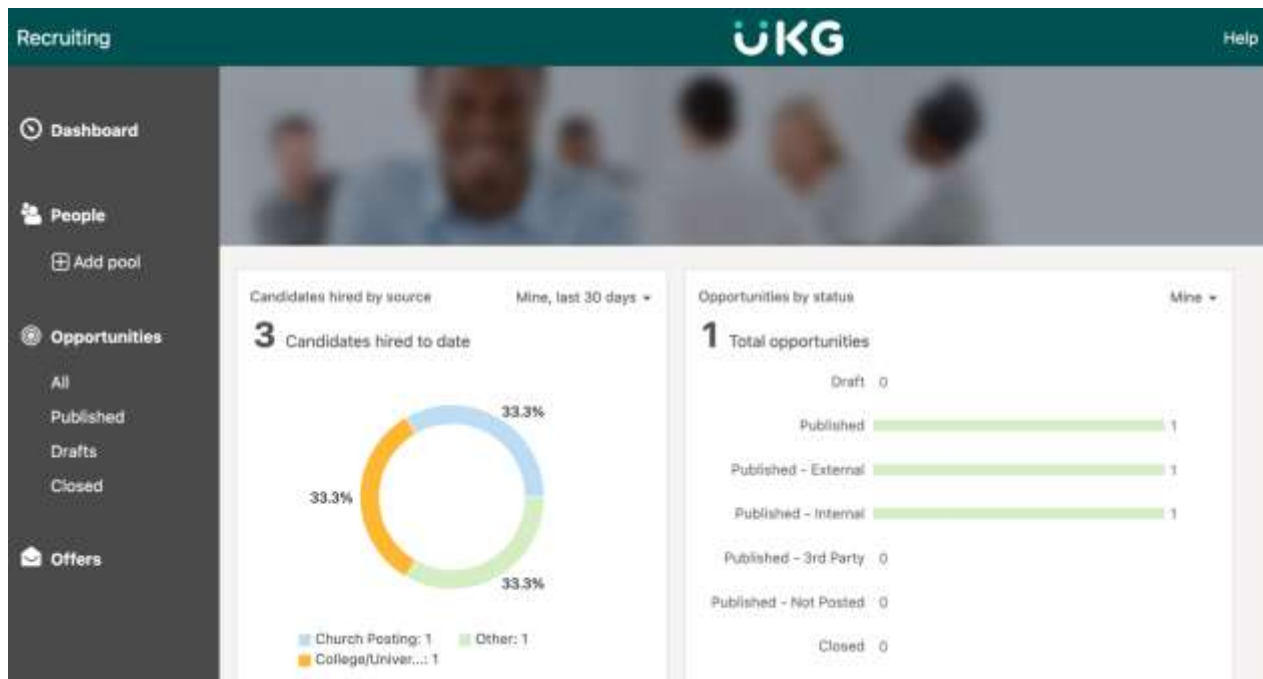
Once you are on the Main Menu page, follow these steps to view the Recruiting Dashboard where you can view applicants, offers, and make changes:

1. Select **Administration** (represented by the person and a key icon)
2. Select **Recruiting** under the Administration dropdown
3. Select **Recruiting Gateway** to take you to the recruiting dashboard.

The screenshot below shows the three steps on the Main Menu:



This will take you to the recruiting dashboard (pictured below) where you will be able to view People, Opportunities, and Offers



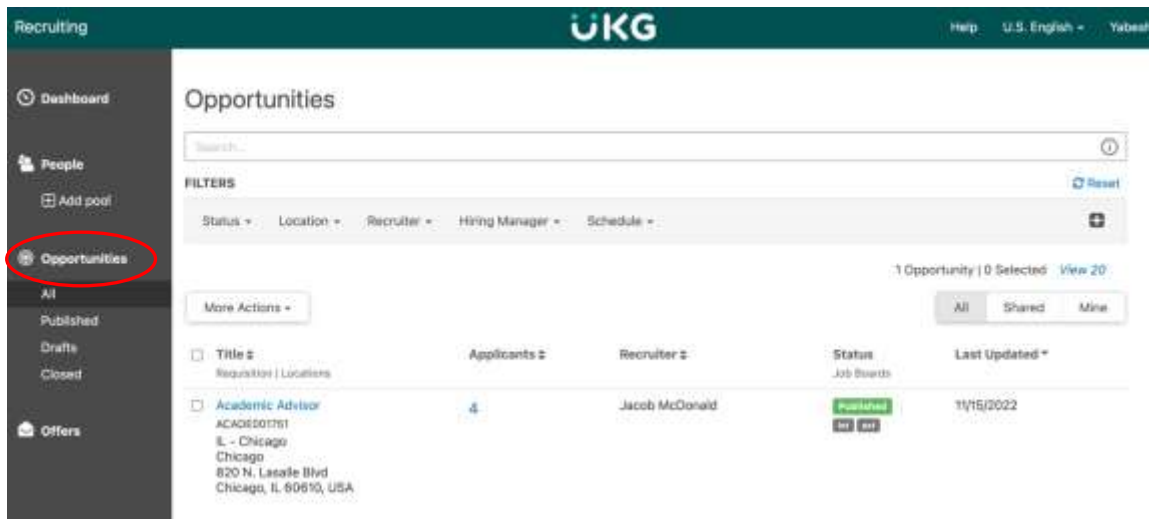
When you click on **People**, you can view all the candidates who have applied for your position.

The screenshot shows the UKG Recruiting interface. The top navigation bar includes 'Recruiting' and the UKG logo. The left sidebar contains navigation options: 'Dashboard', 'People', 'Add pool', and 'Opportunities' (with sub-options: 'All', 'Published', 'Drafts', 'Closed'). The 'People' and 'Add pool' items are circled in red. The main content area is titled 'People' and shows '4 Records | 0 Selected'. An 'Add to Pools' button is visible. Below is a table of candidates:

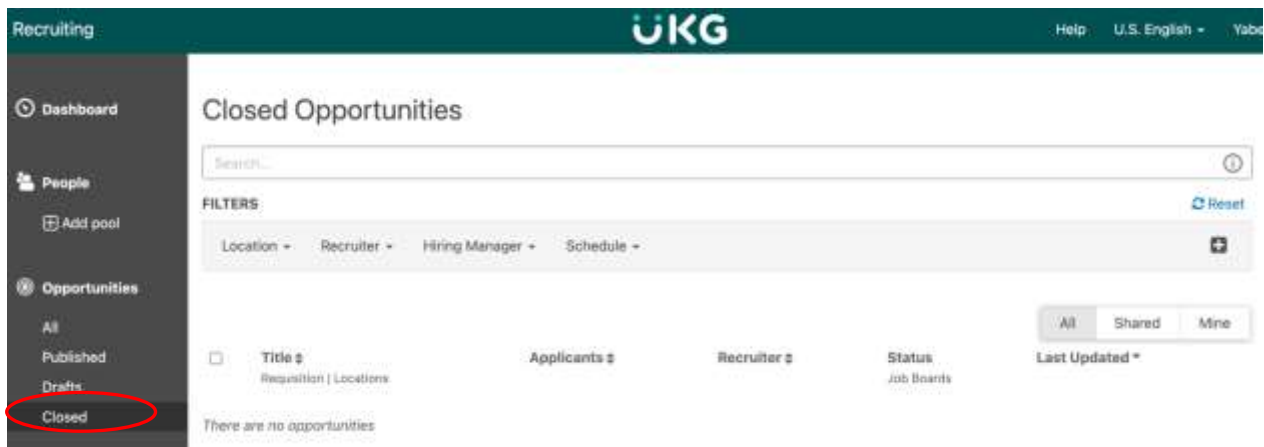
<input type="checkbox"/>	Name ↕ Location	Created By ↕	Last Updated ▼	Actions
<input type="checkbox"/>	Rebekah Swedberg		10/24/2022	...
<input type="checkbox"/>	Tom McDonald		10/24/2022	...
<input type="checkbox"/>	Leah McDonald Chicago, IL		10/04/2022	...
<input type="checkbox"/>	Lisa Test		09/29/2022	...

You can then add candidates to a “Pool.” The pool is only available to the person who created the pool. You may want to save candidates into a pool that you are not considering for your current position, but would like to keep in mind for the future.

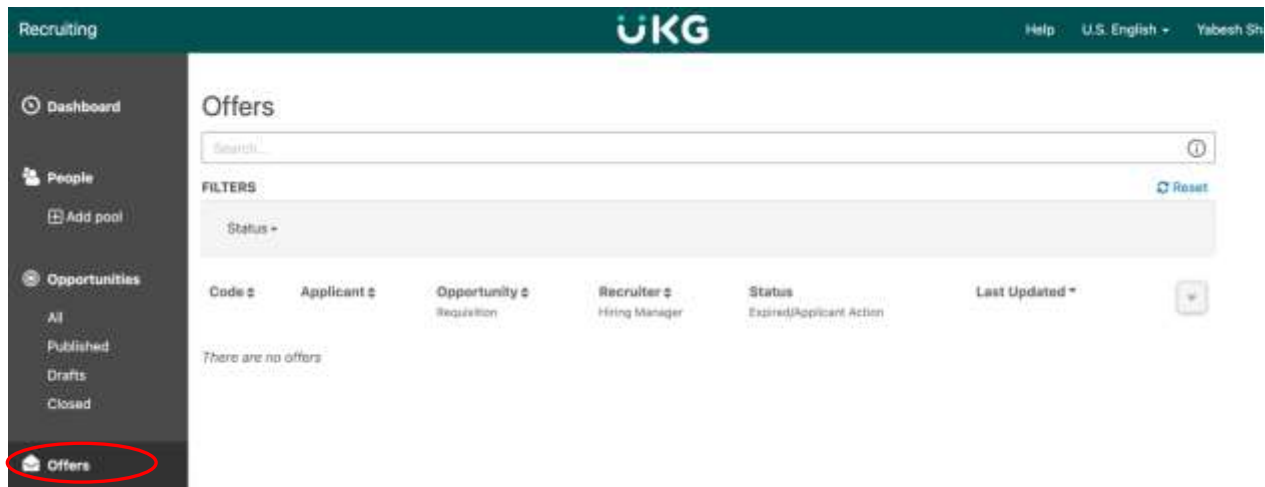
When you click on **Opportunities**, you can view all job posting associated with you as a Hiring Manager. As a Hiring Manager, you will not see jobs that are in the “Drafts” section because your recruiter will publish the job by the time you are designated as the Hiring Manager.



You can view jobs that have been filled which you have been the Hiring Manager for under the **Closed** tab.



When you click on **Offers**, you can view the offer letters that have been accepted for your positions.

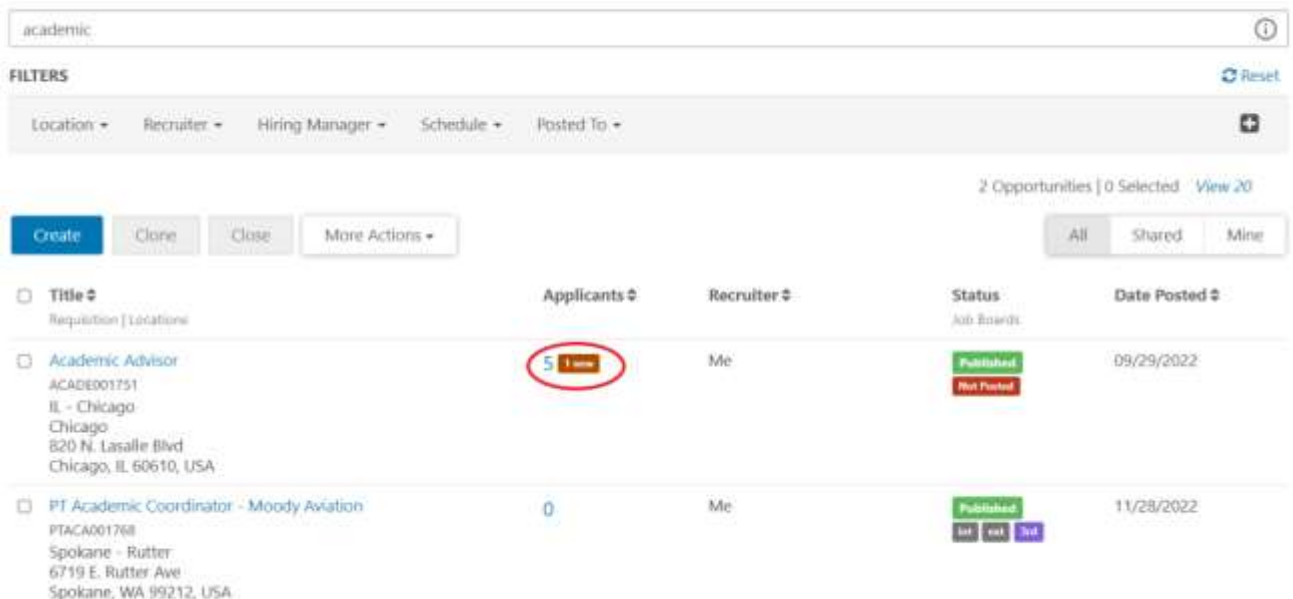


You can review application information in real-time, including candidate details, documents, answers to application questions, references, and more.

1. View applications for your Opportunities.

Select from the Applicants column for each opportunity.

Published Opportunities



2. New applications appear in the Applied step.

Select the candidate's name to view their details on the Application and/or Presence tabs.

Academic Advisor

Fund 11 | Academic Records-Registr

Posted 09/29/2022 | ACADE001731 | Chicago | Chicago, IL 60610, USA

Search...

Step ▾ Candidate Type ▾ Applied By ▾ Applied Date ▾ Source ▾

Reset + Save Filter Saved Filters ▾

5 Applicants | 0 Selected View 20

Disposition	Decline	More Actions ▾	Applicant Name ▾	Step	Days In Step ▾	Screening Status ▾	Applied Date ▾	Availability	Rank ▾	Actions
<input type="checkbox"/>			Kaylee McDonald	Applied	5	Not Disqualified None	11/30/2022 Candidate Church Posting	Not Provided	1	...
<input type="checkbox"/>			Rebekah Swedberg	Hiring Manager Review	6	Not Disqualified None	10/24/2022 Candidate Other	5 days	3	...
<input type="checkbox"/>			Tom McDonald	HR Phone Screen	17	Disqualified None	10/24/2022 Candidate Church Posting	5 days	1	...

Hiring Managers can only view applicants, you may see details of the opportunity and candidates, but any changes will not be saved. If you see something you would like adjusted, please contact the recruiter working with you.

3. Review candidate details, applications, documents, notes, and application questions.

[← Back to results](#)
2 of 16 candidates [←](#) [→](#)

Eva Jordan

Internal employee
⋮

evajordan@email.com
 +1 312-555-5555
 123 street, Miami, Florida 33333 USA

🏷️

Presence

Applications ▾

Assessments

Notes

Created by Eva Jordan 04/22/2021
 Applied 10/07/2021 by Anna Clair

Director of Sales

🏠 0751 BFG Richmond VA | 🌐 Field4, English | 📄 DIREC01846

Disposition

Send Email

Review Resume

More Actions ▾

Applied 12/09/2020	Score N/A	Current Step Applied as of 12/09/2020
Job Board Trading Jobs	Source Design Thinking Board	Process Pha... Apply

Candidate Info

Application Questions

Work Experience

Accountant at Literaturdatenbank, Fakultät für Linguistik und Literaturwissenschaft, Salzburg, DE July 2001 - July 2001

To view information about the candidate's work history, education, and to see their resume select the **Candidate Info** tab.

[← Back to results](#) 2 of 16 candidates [←](#) [→](#)

Eva Jordan Internal employee ⋮

evajordan@email.com
+1 312-555-5555
123 street, Miami, Florida 33333 USA


Presence Applications Assessments Notes Created by Eva Jordan 04/22/2021
Applied 10/07/2021 by Anna Clair

Director of Sales

📍 0751 BFG Richmond VA | Field4, English | DIREC0184E

[Disposition](#) [Send Email](#) [Review Resume](#) [More Actions -](#)

Applied 12/09/2020	Score N/A	Current Step Applied as of 12/09/2020
job Board Trading Jobs 📧	Source Design Thinking Board	Process Pha... Apply



Candidate Info Application Questions

Work Experience

Accountant at Literaturdatenbank, Fakultät für Linguistik und Literaturwissenschaft, Salzburg, DE July 2001 - July 2001

[Complete work experience, education, and other info](#)

To view the candidate's answers to application questions, select the **Application Questions** tab.

The screenshot displays a candidate profile for Eva Jordan. At the top, there is a navigation bar with a 'Back to results' link and a '2 of 16 candidates' indicator. The candidate's name 'Eva Jordan' is followed by a green 'Internal employee' tag and a three-dot menu. Contact information includes an email address, a phone number, and a physical address in Miami, Florida. Below this is an 'Add Tag' input field. A secondary navigation bar contains tabs for 'Presence', 'Applications', 'Assessments', and 'Notes'. To the right of these tabs, the name 'Jake McDonald' is visible, along with creation and application dates. The job title 'Director of Sales' is prominently displayed, with location and field information below it. A row of action buttons includes 'Disposition', 'Send Email', 'Review Resume', and 'More Actions'. A summary box provides application details such as the date applied (12/09/2020), source (job Board), score (N/A), and current step. At the bottom, a navigation menu shows 'Candidate Info' and 'Application Questions', with a red arrow pointing to the latter. The 'Work Experience' section is partially visible at the bottom.

- Rank applicants. Toward the right side of the screen, there is a ranking feature (SEE BELOW). Please give candidates that you would like to be interviewed a rank of “3”, candidates that you are semi-interested in interviewing a “2”, and candidates that you would not consider for an interview a “1.” Your recruiter will know that you have reviewed a candidate if they have been ranked.

Disposition	Decline	More Actions					Rank *	Actions
<input type="checkbox"/> Applicant Name	Step	Days In Step	Screening Status	Applied Date	Availability			
<small>Location</small> <small>Background Checks</small>			<small>% Score</small> <small>None</small>	<small>Applied by</small> <small>Source</small>				
<input type="checkbox"/> Lisa Test	H Hire	40	Not Disqualified <small>None</small>	09/29/2022 <small>Candidate</small> <small>College/University</small>	Not Provided		3	...
<input type="checkbox"/> Rebekah Swedberg	H Hire	13	Not Disqualified <small>None</small>	10/24/2022 <small>Candidate</small> <small>Other</small>	5 days		3	...
<input type="checkbox"/> Leah McDonald <small>Chicago, Illinois</small>	A Applied	35	Not Disqualified <small>None</small>	10/04/2022 <small>Candidate</small> <small>Church Posting</small>	5 days		2	...
<input type="checkbox"/> Tom McDonald	D Decline	0	Disqualified <small>None</small>	10/24/2022 <small>Candidate</small> <small>Church Posting</small>	5 days		1	...

5. Once reviewed, send applicants to the recruiter you are working with.

Select **More Actions** → **Forward Applicant Details**

The screenshot displays the user interface for an applicant tracking system. At the top, the user profile for 'Lisa Test' is shown, including her email 'lisa.test@gmail.com' and phone number '8102478366'. Below this is a search bar with the text 'Add tag'. A navigation bar contains tabs for 'Presence', 'Applications', and 'Notes'. The main content area is titled 'Academic Advisor' and shows a list of applicants. The first applicant is 'Lisa Test', with a status of 'Applied' on '09/25/2022'. A red arrow labeled '1' points to the 'More Actions' button. A dropdown menu is open, showing options: 'Forward Applicant Details' (highlighted with a red underline and a red arrow labeled '2'), 'Schedule Meeting', 'Request Background Check', 'Create Offer', and 'Print Application'. Below the applicant list, there is an 'Availability' section with the text 'None provided'.

Select Recipient(s) to forward Applicant Details → Click Add

Click the drop-down menu under the **Template** section and choose **Forward Application Details**.

Forward Applicant Details

* Recipient(s)

1 search by name OR enter email 2 Add

Jacob McDonald
jacob.mcdonald@moody.edu

Template 3

None

None

Forward Application Details 4

jacob.mcdonald@moody.edu

* Subject:

* Body

The **Forward Application Details** Template will auto-populate an email to send.

Review the subject and body then click **Send**.

The screenshot shows an email composition interface. At the top, the 'Template' dropdown is set to 'Forward Application Details'. Below it, the 'From' field is populated with 'jacob.mcdonald@moody.edu'. The 'Subject' field contains 'Application for Review for Academic Advisor'. The 'Body' field contains the following text: 'Hello, Please click on the link below to review the application for {CANDIDATE_FULL_NAME} for the position Academic Advisor. Application Link: {VIEW_APPLICATION_LINK} Please note, the link remains active for 7 days. If it expires, please request a new link to be sent. In case an error occurs while clicking into the link, please copy and paste the whole link into your browser. Thank you,'. A red arrow points to the 'Send' button at the bottom left of the composition area.

6. The recruiter will reach out for the initial interview to begin the process.