

Bulk Actions Menu

Bulk actions are activities that can be performed on multiple applicants simultaneously. Selecting multiple applicants at once for a particular action can save time. If bulk actions are not used properly, incorrect communications may send to applicants, status changes may be made in error or online offers may be incomplete.

The bulk actions menu is found in the applicant list for a job.

The screenshot shows the top navigation bar with 'PageUp BETA' and links for 'Jobs', 'People', 'Reports', 'Settings', and 'Recent items'. Below the navigation bar, there are links for 'New applicant', 'Search by answers to questions', 'Merge applicants', and 'Select a bulk action' (highlighted with a red circle). The main content area displays the job title 'ADMIN SUPP ASST (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS) (TRAIN81707-US)' and a table of applicants.

Submitted	Status	Pref Name	First name	Last name	Phone	Mobile	Email	Country	State	City	Ref.	Score	Dup	Undisclosed?
Dec 13, 2018	New	Feffer	Feffer	Feffingham	5555555555		ff@ff.com	United States	Wisconsin	Some City	🟢			False
Dec 13, 2018	New	Gigi	Gigi	Giarno	5555555555		gg@gg.com	United States	Arizona	Some City	🟢			False

This screenshot shows the same interface as above, but with the 'Select a bulk action' dropdown menu open. The menu options are: Bulk apply, Bulk categorize, Bulk assign, Bulk communicate, Bulk compile and send, Bulk document merge, Bulk export, Bulk invite to apply, Bulk move, Bulk move and send, Bulk reference check, Bulk send, and Bulk task/reminder.

The most common bulk actions include:

- Bulk communicate
- Bulk compile and send
- Bulk move
- Bulk send
- Bulk move and send
- Bulk reference check

Bulk Communicate

Bulk communicate is used to send the same communication to two or more applicants. These messages are recorded in the History section of the applicant card.

To bulk communicate, select the applicants from the applicant list by clicking the box next to their names. From the bulk actions menu choose “Bulk communicate:”

This screenshot shows the interface with the 'Select a bulk action' dropdown menu open. A red arrow points from the dropdown menu to the checkboxes next to the names of the two applicants in the table below.

Submitted	Status	Pref Name	First name	Last name	Phone	Mobile	Email	Country	State	City	Ref.	Score	Dup	Undisclosed?
Dec 13, 2018	New	Feffer	Feffer	Feffingham	5555555555		ff@ff.com	United States	Wisconsin	Some City	🟢			False
Dec 13, 2018	New	Gigi	Gigi	Giarno	5555555555		gg@gg.com	United States	Arizona	Some City	🟢			False



A new window will appear. Choose “—No template—”, then click the “Next” button:

Select a communication template

Bulk action status: 2 Applicants Complete

Select a communication template:

-- No template --
Confirm updated terms and conditions

Preview

Next > Cancel

Edit the Subject line and type your communication into the text box:

Bulk action status: 2 Applicants Complete

You have requested to communicate with 2 people.

You can communicate using the methods below:

E-mail: Applicants: Yes No

From:* FINIMARTEN@WISC.EDU

Subject:*

Message: Merge fields

B I U Formats

Once complete, click the “Send” button at the bottom of the screen.



Bulk Compile and Send

This function allows application materials from multiple applicants to be compiled into a single PDF document and emailed to TREMS users or other email addresses.

To bulk compile and send, select the applicants from the applicant list by clicking the box next to their names. From the bulk actions menu, choose “Bulk compile and send.”

A new window will appear. Choose the application materials you would like to compile for each applicant then click on “Create PDF” from the bottom of the screen:

Bulk action status: 2 Applicants Complete

You have selected 2 applicants to compile documents for, please select the documents you would like to include.

Application details

- Applicant personal details
- Profile
- Application form
- Additional form
- Application notes
- Onboarding Form
- Completed online reference check form

Applicant documents

- Certification
- Cover letter
- CV
- Licensure
- Reference Letters
- References
- Resume
- Statement of Interest
- Supporting Application Documents (Other document upload)
- Teaching Statement

Recruiter documents

- Mail matcher document

Print options

- Format for double-sided printing



Bulk Send

This function allows you to send applicant materials to TREMS users or other email addresses. Sending information this way does not use the PDF compile process like bulk compile and send. This option is best used for a low number of applicants (maximum of 2-3).

Select the applicants from the applicant list by clicking the box next to their names. From the bulk actions menu, choose “Bulk send.” A new window will appear. Choose the TREMS users or enter other email addresses:

Edit the “Subject” field or text box, if applicable. Choose the applicant materials you would like to send; then click the “Send application” button at the bottom of the screen:



Bulk Move and Send

Bulk move and send is a combination of bulk move and bulk send. Select the applicants from the applicant list by clicking the box next to their names. From the bulk actions menu, choose “Bulk move and send.”

You will be taken to the bulk send screen first. After completing the relevant fields you will be taken to the bulk move page. Follow the prompts to bulk change the applicant status.

Bulk Reference Check

To request multiple reference checks at once, select the applicants from the applicant list by clicking the box next to their names. From the bulk actions menu, choose “Bulk move reference check” to open a new window:

Request reference check

Please fill in all mandatory fields marked with an asterisk (*).

Bulk action status: 2 Applicants Complete

You have requested to perform reference checks for 2 applicants.

Please select the expiry date for the reference check invitation:

Invitation expiry date:*

*This function will only work if you utilized the reference form within the application. For Faculty positions, this function will only work if you did not choose reference automation at the time of job creation.

To complete the reference request, click on “Finish:”

Bulk action status: 2 Applicants Complete

You are able to request reference checks from 6 references, on behalf of 2 applicants.

[Preview the references who will be invited to provide reference checks](#)

Emails will only be sent to references with a valid email address.

You can communicate using the methods below:

E-mail: References: Yes No

From:*

Subject*

Message*

B I U S **Formats** - **A** - - - - - - -

Dear (REFEREFIRSTNAME),

{FIRSTNAME} (LASTNAME) recently applied for the position of (JOBTITLE)-(JOBNO) with the University of Wisconsin-Madison and has listed you as a reference. In order to move forward in the next stage of the recruitment process, we need your assistance in completing a reference letter on {FIRSTNAME}'s behalf.

To upload the letter of recommendation, please click on the following link. Once the letter has been uploaded, click on 'Submit.'

{REFERENCECHECKURL}

If you have any questions, please contact (JOBOWNERFIRSTNAME) (JOBOWNERLASTNAME) at (JOBOWNEREMAIL).

uvjobs@wisc.edu.

Drag & Drop files here

Or click to browse from local drive.

SMB file size limit

