

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 TREMS interface for the job 'ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS) (TRAIN81707-US)'. At the top, there are navigation links for 'Jobs', 'People', and 'Reports'. Below the search bar, there is a dropdown menu labeled 'Select a bulk action' which is circled in red. The main content area displays a table of applicants with columns for Submitted Status, Pref Name, First name, Last name, Phone, Mobile, Email, Country, State, and City. The table contains five rows of applicant data.

This screenshot shows the same interface as the previous one, but with the 'Select a bulk action' dropdown menu open. The menu options are: Bulk communicate, Bulk compile and send, Bulk move, Bulk move and send, Bulk reference check, and Bulk send. The table of applicants is visible in the background.

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:”

Search by answers to questions | Select a bulk action

ADMINISTRATIVE SUPPORT ASSISTANT (A070800-COL OF AG & LIFE SCIENCES/INT'L PROGRAMS) (TRAIN81707-US)

Search Results

Select	Submitted	Status	Pref Name	First name	Last name	Phone	Mobile	Email	Country	State	City
<input type="checkbox"/>	Dec 23, 2019	Verbal offer	Bucky	Bucky	Badger	6086086088		buckybadger@gmail.com	United States	Wisconsin	Madison
<input checked="" type="checkbox"/>	Dec 27, 2019	Search committee review	Fins	Fins	ToTheLeft	(402) 291-5678		fins@fins.com	United States	New Mexico	Bellevue
<input checked="" type="checkbox"/>	Dec 23, 2019	Search committee review	Fiona	Fiona The	Hippo	124201777		fionahippo@gmail.com	United States	Ohio	Cincinnati
<input type="checkbox"/>	Dec 20, 2019	Phone Screen Accepted	Izzy	Izzy	Johnson	608-555-5555		izzy@gmail.com	United States	Wisconsin	Madison
<input type="checkbox"/>	Dec 23, 2019	Interview 2 accepted	Ross	Ross	Geller	9876543214		DrRossGeller@gmail.com	United States	Wisconsin	Madison

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:*

Subject:*

Message: Merge fields

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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 Statment

Recruiter documents

- Mail matcher document

Print options

- Format for double-sided printing

[Create PDF](#) [Cancel](#)



Once compiling is complete you can download the PDF and/or email it to TREMS users or other email addresses:

Bulk action status: 2 Applicants Complete

To download the document, right click on the link below and select 'Save Target As'.
Note: To send the document it is not necessary to download the document below.
The document will be sent as an attachment with the communication below.

Your document is ready to download:
Download document (164.6 kb)

Send document: Yes No

User:
No user selected.

Other e-mail:

From:* FINIMARTEN@WISC.EDU

Subject:* ADMIN SUPP ASST (A070800-COL OF AG & LIFE SCIENCES/I

Body:*

Show merge field information

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Please see attached the applications for:

- Feffer Feffingham
- Gigi Giamo

Bulk Move

The bulk move function allows you to move multiple applicants into the same, new status. To bulk move, select the applicants from the applicant list by clicking the box next to their names. From the bulk actions menu, choose Bulk move. **Bulk move should never be used to place applicants into Verbal offer status!**

Choose the appropriate status from the dropdown menu then click Next:

PageUp

Bulk action status: 2 Applicants Complete

You have requested to move 2 applicants.

Select a status to move these applicants to:

Application status: **Select**

- New
- Does not meet minimum qualifications
- Search committee review
- Hiring Manager review
- Phone screen
- Phone Screen Accepted
- Phone Screen Declined
- Interview
- Interview 1 accepted
- Interview 1 declined
- Interview 2
- Interview 2 accepted
- Interview 2 declined
- Interview 3
- Interview 3 Accepted
- Interview 3 Declined
- Reference check
- Verbal offer
- Background Check
- Background check successful
- Online offer made
- Offer accepted
- Offer declined
- JEMS new identification form paperwork complete
- Withdrawn
- No longer considered
- Cancelled
- Submitted
- Incomplete

To complete the status move, click the Move now button at the bottom of the screen.



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:*

Next Cancel

*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.*

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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

Finish Cancel

