

Candidate Tracking

Managers

For Managers looking to manage candidates through the recruitment process for a job requisition you initiated and to learn how to provide an offer, this document will guide you through the following tasks and processes:

Reviewing Candidates

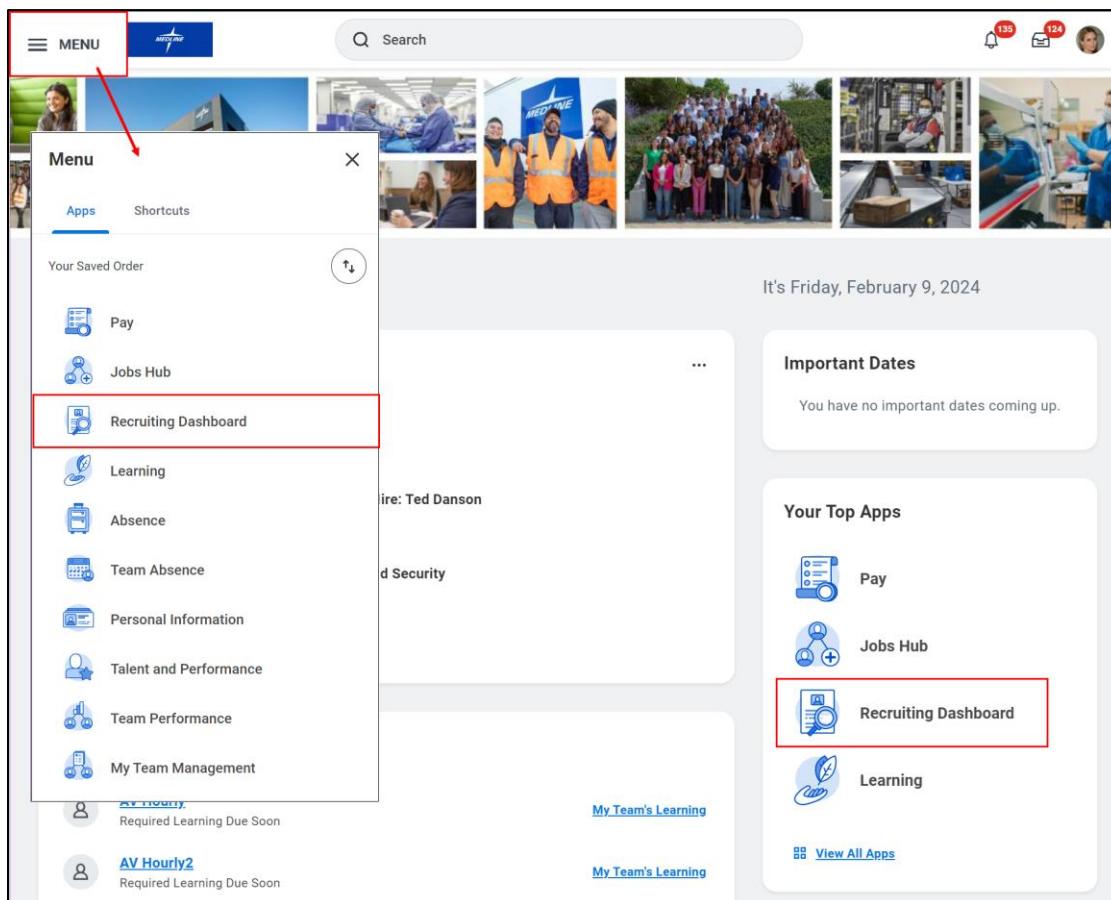
How to review candidates that have applied to one of your job requisitions.

Offer Approval Process

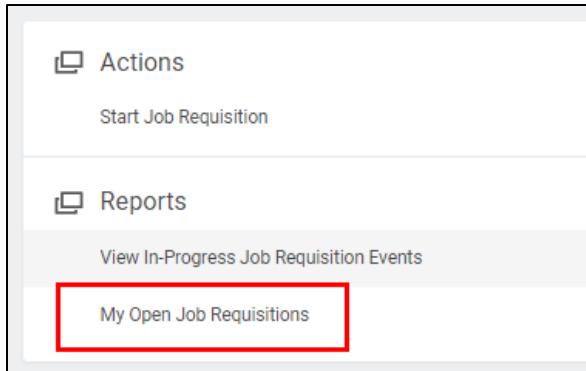
How to initiate an offer for a candidate that has applied to a job opening on your team in Workday.

Reviewing Candidates

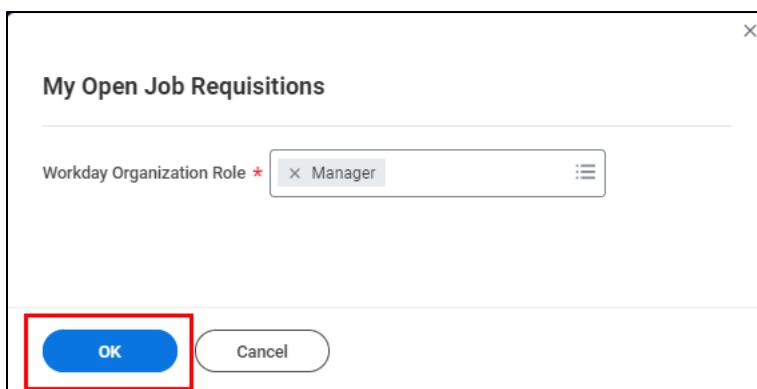
1. From your Workday Homepage, select the **Recruiting Dashboard** application from the **Applications Menu**. Alternatively, you can click the **Recruiting Dashboard** app directly on your Workday Homepage below **Your Top Apps** if it appears there.



2. Under the **Reports** column, select **My Open Job Requisitions**.



3. If you are the Manager on the job requisition, it will automatically populate. Then, click **OK**.



4. Select an **Open Job Requisition** from the list to view candidates for.

My Open Job Requisitions			
Workday Organization Role Manager			
3 items			
Job Requisition	Primary Location	Recruiter	Supervisory Organization
R2400017 HR Generalist (Open)	📍 MFG- Anaheim, CA		Emily Blunt
R2400106 Accountant (Open)	📍 MFG - Mexicali1		Emily Blunt
R2400243 Associate - Accountant (Open)	📍 CORP- Libertyville		Emily Blunt

5. Then, click **Candidates** or **Review Candidates**, which will take you to the same tab.

R2400243 Associate - Accountant (Open)

Recruiting Start Date 02/09/2024 - 12 days ago

Target Hire Date 02/09/2024 - 12 days ago

Primary Location  CORP- Libertyville

 Emily Blunt
Hiring Manager

 Recruiter

Overview Candidates Details Organizations Qualifications Job Postings

Review Candidates

Candidate Pipeline

Active Candidates 1 Referral 0 Internal 0 Inactive 0

Candidates by Active Stage

6. From this page, you can view candidates for the job requisition.

- View the number of **Active Candidates**, **Active Referrals**, **Active Internal Candidates**, or **Converted Prospects**.
- Filter candidates by ones **Awaiting Action**.
- View all in the table.

Review Candidates R2400243 Associate - Accountant (Open)

Active Candidates 1 of 1 Active Referrals 0 of 0 Active Internal Candidates 0 of 0 Converted Prospects 0 of 0

All Active Candidates Awaiting Action

a

Review Screen Assessment(s) Interview

No Filters Applied

1 item

Overview Contact Questions Experience

C	Job Application	Step / Disposition	Awaiting Action	Awaiting Me	Date Applied	Current Title	Current Company	Resume	...
<input type="checkbox"/>	• Katniss Everdeen (C00628)	Recruiter Phone Screen	1		02/21/2024			 Resume.pdf	...

d. Click on a candidate's **Name** in the table to review their application.

	Job Application	Step / Disposition	Awaiting Action	Awaiting Me
	• Katniss Everdeen (C00628)	Recruiter Phone Screen	1	

e. You will be directed to the candidate's **Profile**, where you can view their **Work History Experience, Education, Resume / Cover Letter, Languages, Websites** and more.

1 of 3

Katniss Everdeen (C00628)
For: R2400243 Associate - Accountant

Actions

Summary (selected)

Overview

Attachments

Questionnaire Results

Screening

Employment Offer

Recruiting History

Activity

Reminders

Additional Data

Phone Number
+1 (256) 3531555 (Mobile)

Email
katniss.everdeen@invalid.com

Location
1702 Bellline Rd SW, Decatur, AK 35601 United States of America

Jobs Applied to
1

Job Application Details

Job Requisition R2400243 Associate - Accountant (Open)

Location CORP- Libertyville

Date Applied 02/21/2024 01:14:45 PM

Source Online Advertisement/ Job Posting -> Dice

Emily Blunt
Hiring Manager

Recruiter

In Progress 1 item

Step	Awaiting Me	Awaiting
Review	Review Decision	1

Active Job Applications (1)

Katniss Everdeen - R2400243 Associate - Accountant (C00628)

Location: CORP- Libertyville | Date Applied: 02/21/2024

Actions

Decline These Applications

Work History

Experience
none entered

Education

INSEAD Business School
Masters | To 2022

Languages
none entered

Websites

View All

f. You may be asked to screen the candidate's application if the Recruiter chooses to send it over to you. In such case, you will receive a task in your Workday **My Tasks Inbox** titled **Hiring Manager Submission** with the candidate's name. Review their application, then select **Move Forward** and **Proceed with Interview**.

The screenshot shows the Workday interface for a candidate named Katniss Everdeen (C00628). The left panel displays a list of items, with the first item highlighted. The right panel shows the candidate's profile and job application details. The 'Active Job Applications' section shows one application for 'R2400243 Associate - Accountant (C00628)' with a status of 'Screen'. The 'Job Application Details' section provides information about the job requisition, location, date applied, source, and recruiter. The 'Work History' section shows a single entry for 'R2400243 Associate - Accountant (C00628)'. The 'Actions' bar at the bottom of the right panel includes buttons for 'Proceed with Interview' (highlighted with a red box) and 'Move Forward'.

Offer Approval Process

1. After the recruiter submits the offer details, it will be routed to you for your approval before it is sent to the candidate. Select the task in your Workday **My Tasks Inbox** titled **Offer for Job Application** with the candidate's name.

The screenshot shows the Workday interface for an 'Offer for Job Application' for Katniss Everdeen (C00628). The left panel displays a list of items, with the offer item highlighted. The right panel shows the offer details, including the candidate's name, creation date (02/21/2024), due date (02/23/2024), and the job application details. The 'Review' section provides a summary of the offer and its status. The 'Details to Review' section lists the hire date (02/22/2024) and hire reason ('Hire Employee > New Hire').

2. On the right-hand side of the screen, review the details of the offer. Then, you can either select **Approve** or **Send Back**. If you choose to send back, please provide a reason for the recruiter to make the necessary modifications.

Review

Offer for Job Application: Katniss Everdeen - R2400243 Associate - Accountant (C00628) ...

Created: 02/21/2024 | Due: 02/23/2024

For Job Application: Katniss Everdeen - R2400243 Associate - Accountant (C00628) on 02/21/2024

Overall Process Offer for Job Application: Katniss Everdeen - R2400243 Associate - Accountant (C00628)

Overall Status In Progress

Details to Review

Hire Date	* 02/22/2024
Hire Reason	* Hire Employee > New Hire
Location	* CORP- Libertyville
Job Profile	Accountant
Business Title	* Accountant
Location Weekly Hours	40

Approve Send Back ...

3. If approved, the offer will be routed to a superior in your organization for approval. The name will be mentioned in the confirmation notification.

Success! Event approved

Up Next: | Consolidated Approval Chain by Manager

[View Details](#)

4. They can choose to either **Approve** or **Send Back**. If they approve, the next step will route to the recruiter to generate a document for offer.

Success! Event approved

Up Next: | Generate Document for Offer (Default Definition): Medline Offer Letter Standard - Generate Standard...

[View Details](#)

5. If the candidate accepts the offer, you will receive a task in your Workday **My Tasks Inbox** to complete the **Onboarding Setup for Hire**.

The image shows a split-screen view of the Workday interface. On the left, the 'All Items' list is displayed with a red box highlighting the first item: 'Onboarding Setup for Hire: Katniss Everdeen - Accountant on 02/22/2024'. On the right, the 'Onboarding Setup' page is shown with a red box highlighting the 'Message' section, which contains a welcome message to the new hire. Below the message is the 'People to Meet' section, which lists several team members with a 'Notify' checkbox.

6. On the right-hand side of the page, enter details for the new hire's Onboarding Dashboard, including a **Message**, **People to Meet**, and **Helpful Contacts**. Click the checkbox next to **Notify** to alert the people you have selected as helpful or recommended to meet. Then, click **Submit**.

The image shows the 'Onboarding Setup' page. Several fields are highlighted with red boxes: the 'Message' box, the 'Select People' box in the 'People to Meet' section, the 'Notify' checkbox in the 'People to Meet' section, the 'Select People' box in the 'Helpful Contacts' section, and the 'Notify' checkbox in the 'Helpful Contacts' section. At the bottom, the 'Submit' button is highlighted with a red box.

7. Congratulations, the offer process is now complete!