
Keep in Mind

- Hiring managers are assigned the role of recruiting screener in Workday, which allows access to review all applicant information.
- If you do not have access for the job(s) you’re hiring for or the Recruiting Worklet on your homepage, contact the HR partner in your unit to ensure you have been assigned to the correct job requisition.

Information Needed

- Job Requisition Number
- Job Title
- Key words based on skills or experiences required for the position, to aid in filtering candidates.

A. Locating the Job Requisition:

Log in to Workday:
Once logged into Workday, there are two ways for a recruiting screener to locate the job requisition:

1. The Search Bar:
   From the general Workday Search bar, found at the top left side, type in the Job Requisition number .

   ! If no results appear, be sure to select “All of Workday” or “Recruiting” in the sidebar menu as your search categories.

2. The Recruiting Worklet:
Go to your Workday Dashboard and **select** the Recruiting Worklet.

From the View column, **select** Job Requisition. In the search field, type in the requisition number and **select** OK.

![Prompt Icon]

If you do not have the requisition numbers, select the Prompt Icon to expand the list of your assigned job requisitions. Select the requisition and **select** OK.

The job requisition will open to an overview page, which features a funnel graphically summarizing the number of applicants at stage of the recruiting process. Note: Some steps shown in the funnel are optional and not utilized in all circumstances.
B. Review of the Landing Page

Within the requisition screen, you will use the Candidates tab to access a list of submitted applications and review candidates. **Click** on “Candidate” tab to open the candidate grid, where you can select an individual to view their resume and credentials, or use filters to select groups of candidates to review.

Other useful information is found on this landing page.

1. The Recruiting Start Date, Target Hire Date, and Primary Location are displayed in the header.
2. The assigned primary recruiter for this requisition and hiring manager for position are shown at top right.
C. Review of the Candidate Grid

<table>
<thead>
<tr>
<th>A: Candidate</th>
<th>B: Overview</th>
<th>C: Questions</th>
<th>D: Contact</th>
<th>E: Resume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step / Disposition</td>
<td>Date Applied</td>
<td>Current Title</td>
<td>Current Company</td>
<td>Resume</td>
</tr>
<tr>
<td>Awaiting Action</td>
<td>Awaiting Me</td>
<td>Candidate has a potential Duplicate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer</td>
<td>1</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/17/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. **A - Candidates:** Clicking the name in this field displays a screen with details on the candidate’s experience, skills, education, resume, and more.

2. **B - Overview:** This is the default display showing general applicant information, i.e. date applied, current job title, and a link to the resume. Data can be filtered on each of these columns.

3. **C - Questions:** The candidate’s response to the questionnaire from the application are found here. Data can be filtered on each of these columns.

4. **D - Contact:** The candidate’s address, phone, email, degree information, social profile, and years in current job are listed here. Data can be filtered on each of these columns.

5. **E - Resume:** This section includes the resume text. Use this section to search all candidate resumes by filtering for keywords describing relevant skills, work history, educational background, etc. (see below for further filtering instructions). This helps narrow the pool and brings to light the top candidates for the position.
Working through the functions:

Filtering the Candidate Grid:

Each column within each tab of the candidate grid has a filter feature to filter candidates either in or out, based on criteria entered in the search field. To activate the filter function, simply click on the column.

Example 1 - Filtering Columns:

If your search is aiming to find candidates with experience as a business analyst, you can filter by that job title.

1. Go to the “Resume” tab and click the “All Job Titles” column.

2. From the “Filter Condition” field, select one of the following: contains, begins with, not equal to, or is empty. (For this example, “contains” was selected).

3. Type the business title “Analyst”. This will pull a set of candidates who have listed that job title within his or her resume.
Example 2 – Searching the Resume Text:

This type of search can be used if you are looking to pull a specific skill sets or experience from the resumes (i.e. all candidates who have Workday experience).

1. From the Candidate Grid, select the funnel, found on the right side of the Candidate Grid.

2. Select add to specify your filter content.

3. From the Prompt Icon, select Resume. Using the radio buttons, select Resume Text.

4. From the Filter Condition field, select one of the following: contains, begins with, not equal to, or is empty. *(For this example “contains” was selected).*

5. In the Value field, type the experience or skill set for which you are searching. *(For example, Workday)*

6. Select filter.

To remove the filter, click the funnel found on the right side of the Candidate Grid to deselect.

To add additional filters, select add and follow steps 3 – 6 above.

Quick Navigate of Candidates:

1. From the candidate grid, select the candidate to open and review the candidate profile.

2. Click on the up or down arrows, located on the top right hand side of the candidate profile to quickly review each candidate’s profile and access the resume, without having to return to the candidate grid.

3. Click on the arrow located at the top left side of the profile to return to the candidate grid.

Communicate with the Primary Recruiter:

Through Workday, a Recruiting Screener can inform the Primary Recruiter what action to take on a candidate (i.e. consider, invite for a phone screen, disposition, etc.) via the activity stream on the candidate’s profile. The Primary Recruiter will receive a notification in the notification Workday Inbox, which automatically includes the candidate’s name and job requisition number.

1. From the candidate’s profile scroll down to find the Activity Stream.
2. In the open field tag the Primary Recruiter, by first typing @ and type the Primary Recruiter Name in the pop up window, once found the name should appear in the activity stream.

3. After the name is selected, type the message and select **Post**.

**Interview (if applicable):**

At the interview stage, the Primary Recruiter designates individuals who will be part of the interview committee, which must consist of at least one person. Once the committee has been created, each committee member will have the opportunity to “Rate the Interview”.

**Rate the interview** *(applicable if the recruiting screener is part of the interview committee)*

Once an interview has been scheduled, each committee member will receive a “Rate the Interview” task in their Workday inbox

The Interviewer will select their rating (1- Do Not Recommend, 2- Recommend, and 3- Highly Recommended) from the drop-down menu options and select **Send** to submit.  
**Note:** This task does not stall the process if the interviewer(s) delay entering in their score.

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