Module 4: Miscellaneous Features: Exports, Tags, and Graphs

Objectives:

- **Export application data**
- **Export reviewer comments**
- **Export contact information**
- **Apply/remove Tag**
- **Create a graph**

Lesson 18: Export Application Data A F S

1. Select the population you wish to export. For the purpose of this example, navigate to the Expanded View Applicant List page and select "Admit" from the Quick Search Dept. Status dropdown. Click GO.
   The Expanded View Applicant List will refresh to display your results.
2. Click Export Results in the bottom right of the page (you may need to scroll to see it).
   A dialogue box will open.
3. Open the exported CSV file in Excel. You may do this by saving it to your computer and opening it, or opening it directly through the browser.
   Examine the document contents to familiarize yourself with the format of the exported data.

Notes:

Lesson 19: Export Reviewer Comments

A + Reviewer Comments F S

1. Continue from Lesson 17.
2. Return to your Expanded View Applicant List page. Click Export Comments.
   A warning message opens to inform you that this export may take up to 45 seconds to complete.
3. Click OK
   A dialogue box will open.
4. Open the exported CSV file in Excel. You may do this by saving it to your computer and opening it, or opening it directly through the browser.
5. Examine the document contents to familiarize yourself with the format of the exported data.

Notes:

Users without access to view Reviewer Comments will be able to export Admin Comments only.

Lesson 20: Export Contact Info

1. Continue from Lesson 18.
2. Return to your Expanded View Applicant List page. Click Export Contact Info.

   A dialogue box will open.
3. Open the exported CSV file in Excel. You may do this by saving it to your computer and opening it, or opening it directly through the browser.
4. Examine the document contents to familiarize yourself with the format of the exported data. You may need to expand columns to properly display phone number data.

Notes:

Tags

The Tags feature allows users the ability to track a self-defined population of applicants. These populations may be public or private depending on the type of Tag permissions selected. Users can mark individual applications or multiple applications as a unique Tag (String of Text) and use that Tag identifier in filters to track the population they have defined.

Tags can be deleted on the Applicant Listing page or on at the Applicant Review level. Click the red X to remove a tag.

Batch deletions are not supported at this time.

Notes:

Lesson 21: Apply a Tag

There are two places where you can Apply a Tag: The Review Applicant page and the Manage Applicant page. This lesson will cover both.

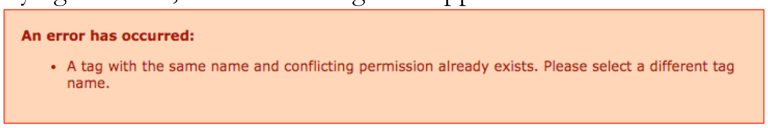
A. Select an applicant you wish to Apply a Tag. Click on their name on the Applicant Listing page to access the Review Applicant page.

B. To create a new tag, follow the steps below.

   1. Type into the Tag field on the top section of the Review Applicant page.
   2. Select Tag permission type
      a. Private – can only be seen and applied by user
      b. Public View – all users can see, but only owner can apply or remove Tag to an applicant
      c. Public Edit – anyone can apply or remove a Tag to an applicant
   3. Click "Add Tag"

Notes:

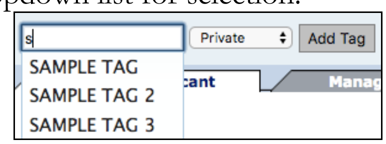
a. If another user is using the same Public View or Public Edit Tag that you are trying to create, an error message will appear.



4. Update the Tag to be unique and repeat step 3.

C. Or Select from the list of Tags available.

1. Start typing the beginning of the Tag ('s'), a list matching the characters will appear in a dropdown list for selection.



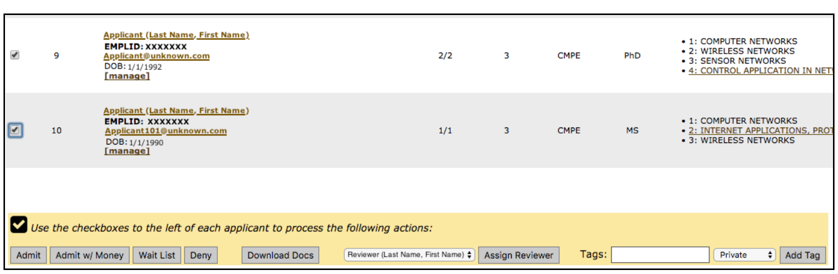
2. Select the Tag you want to apply to the applicant. Notice that the permission type is greyed out, the Tag type cannot be changed, but a new and unique Tag can be created.

Notice that the Tag will now display in the Tags column of the Applicant Listing grid and just below the Bio/Demo section.

Lesson 22: Apply Multiple Tags G A F D S

There are two places where you can Apply a Tag: The Review Applicant page and the Manage Applicant page. This lesson will cover both.

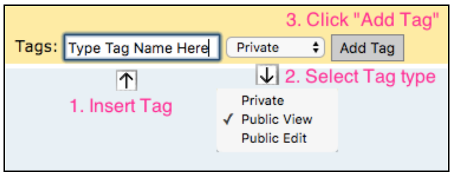
A. On the Applicant Listing page, identify several applicants that you would like to add to your Tag list. Click the checkboxes that precede their names and navigate to the bottom of the Applicant listing page.



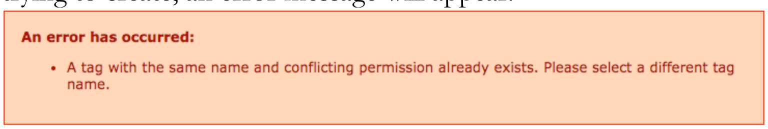
B. To create a new tag, follow the steps below.

Notes:

1. Type into the Tag field on the top section of the Review Applicant page.
2. Select Tag permission type
    a. Private – can only be seen and applied by user
    b. Public View – all users can see, but only owner can apply or remove Tag to an applicant
    c. Public Edit – anyone can apply or remove a Tag to an applicant
3. Click "Add Tag"

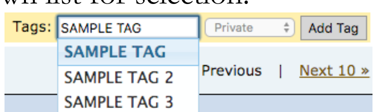


    a. If another user is using the same Public View or Public Edit Tag that you are trying to create, an error message will appear.



4. Update the Tag to be unique and repeat step 3.

C. Or Select from the list of Tags available.
1. Start typing the beginning of the Tag, a list matching the characters will appear in a dropdown list for selection.



2. Select the Tag you want to apply to the applicant. Notice that the permission type is greyed out, the Tag type cannot be changed, but a new and unique Tag can be created.

3. Now you can select from a list of available tags.

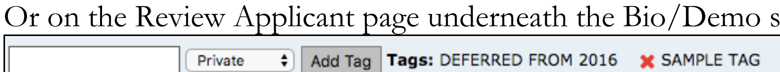
You will be directed to another page. Click **Back to Applicant List**

Lesson 23: Deleting Tags G A F D S

Notes:

1. There are two places to delete a Tag.
    a) On the Applicant listing page in the Grid.

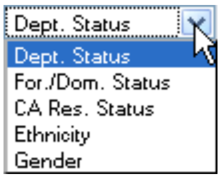
    b) Or on the Review Applicant page underneath the Bio/Demo section.



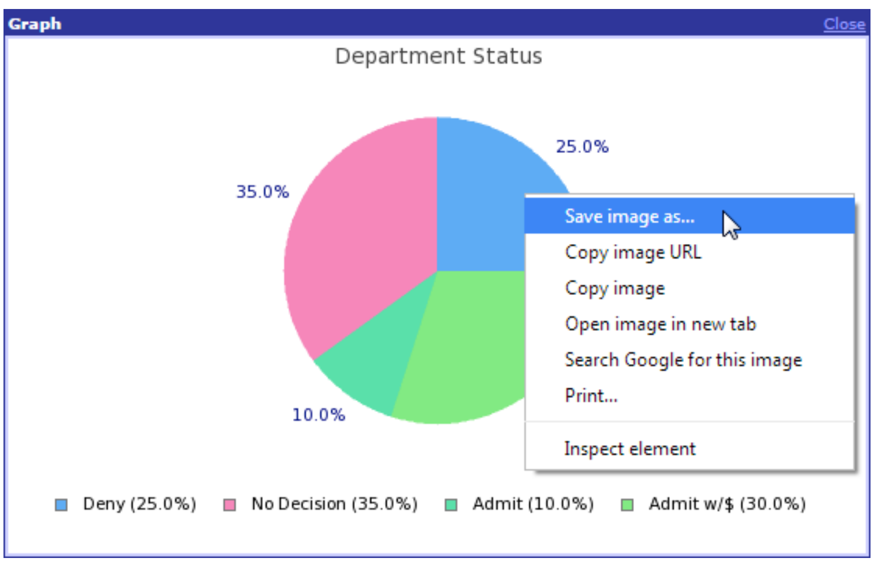
2. Click on the red X next to the Tag to remove. ✖ SAMPLE TAG
    a) Repeat for each Tag you wish to remove.

Lesson 24: Create a Graph G A F D S

1. Select the population you wish to analyze. For the purpose of this example, navigate to the Expanded View Applicant List page and click CLR. Click GO.
   The Expanded View Applicant List will refresh to display the full applicant population you have security access to view.
2. Select a graph type from the dropdown.



3. Click View Graph.
   A pie chart displays the breakdown of statuses that you chose to view and their relative percentages in relation to the entire population you chose to graph.
4. Alternate-click (right-click or hold Ctrl and click) on the pie chart image. Select "Copy Image."
   You can now paste the pie chart into a document or report.



Click Close to stop displaying the graph window and return to the Applicant listing page.

Notes: