Search Approval Process (from PageUp Dashboard)

Individual Applications

Step 1: Open Job Card from Dashboard:

- ***Designated approver name in workflow -*** Access search from the dashboard Approve Searches tile (only approver names specifically identified in the workflow will display in this tile, or use the Quick Search field to enter Search # and find in the results (upper left on navigation bar)
- ***General workflow approver groups*** - Access search from the dashboard View Searches tile and click **View My Team Searches**

Step 2: Click ***View*** (far right) for the applicable Search #

Step 3: Review the job card and job details; edit as needed

Step 4: Select one of the following options at the bottom of the job card: **Approve, Decline and Cancel**
Note: The **Approve** button will only display for specific names identified in the workflow. If Approve button is selected, the job card will move forward to the next approver in the workflow. For general approval groups, the workflow must first be edited to the user's name. See *section Editing Names in the Approval Workflow* below.

Step 5: Job status updates to **Approved** when all approvers have approved, the process is complete and the initiator will receive an approval notification

Approving a Job via Email

When an approver receives an email requesting approval, the approver has the option to approve or decline the job card via reply email.

Step 1: Open email requesting job card approval
Note: For complete position details, please click on the link to view the complete job card.

Step 2: Click **Reply**

Step 3: Enter the word **Approve** or **Decline** in the body of the email

Step 4: Click **Send**
Note: PageUp will only recognize the words **Approve** or **Decline**. If you add any other details the system will not recognize the reply and you will receive an email to advise that your reply could not be processed. You will still need to action the approval request.

Editing Workflow Approvers

If an approver specified in the workflow is out of the office or away on vacation, another approver with access to the job card can update the workflow approver name. General approver groups will also need to update the workflow to their name to display the **Approve** button.

Step 1: Select **View My Team Searches** to open the job card *(View Searches* dashboard tile*)*

Step 2: Click ***View*** (far right) for the applicable Search #

Step 3: Scroll to the W*orkflow* section at the bottom

Step 4: Click **Edit** next to name to update

Step 5: Click the *eraser icon* to clear the field

Step 6: Type the approver's name and click tab

Step 7: View the field to confirm name, and email address should display below in the blue box

Step 8: **Save** the workflow edit

Step 9: **Submit** the search to update the workflow change

Step 10: Scroll to bottom of the job card and click **Approve**

Approve Hire Request

Step 1: Select **Offers awaiting your approval** (*Approve Offers and Manage Onboarding* dashboard tile)

Step 2: Click **View** on the far right of applicant row

Step 3: Scroll through offer details and update as needed
Note: Draft offer letter is attached in the *Offer Documents* section, click *View* to open the letter

Step 4: Click **Submit** to save changes and scroll to bottom of page – if no changes, skip to *Step 6*

Step 5: Click **Approve** to move forward in the approval workflow, or click **Decline** to return to the initiator for revisions
Note: The offer will not be sent to the applicant until applicant status is updated to: *Make Online Offer*