

How a PI or Manager Creates a Prospect

1. Log in to Workday using your **ID** and **Password**.
2. Once you are signed in, type **Create Prospect** in the search bar ❶ as shown in **Figure 1** below. Click on **Create Prospect** ❷, this will open a **Create Prospect** window shown in **Figure 3** on **Page 2**.
3. **Please Note:** By typing **Create Prospect** in the search bar then pressing enter, a **Create Position** button ❸ will as shown in **Figure 2** below. That will open a **Create Prospect** window shown in **Figure 3** on **Page 2**.

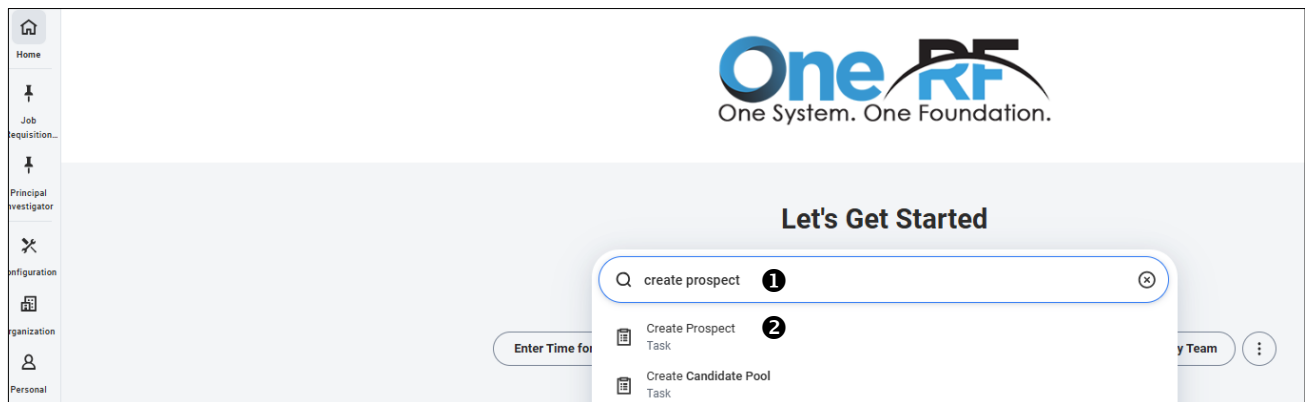


Figure 1

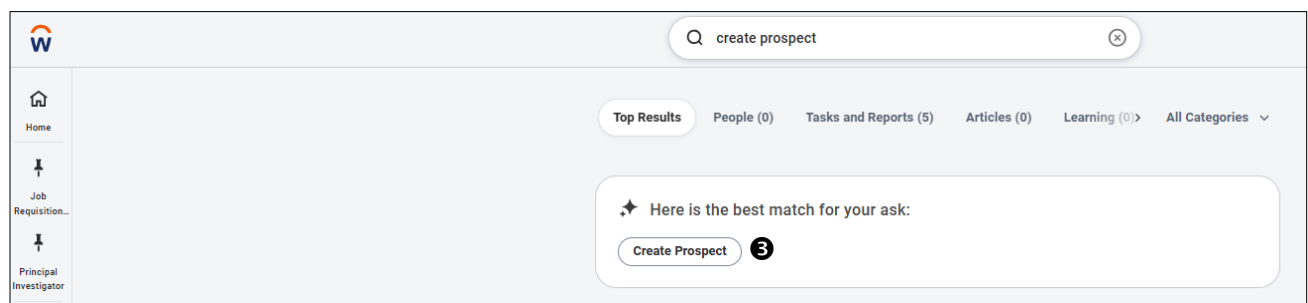


Figure 2

4. Under Prospect Details, either select **Create New Prospect**, **Create from Existing Workers**, or **Create from Resume/CV ❶**.
5. Fill out employee's general information such as **First Name**, **Last Name**, and **Email ❷**.
6. Then click **OK ❸**. A new window will appear to fill in all Prospect information as seen in **Figure 4 on Page 3**.

Please Note: The phone number is not required to proceed. The system will check for duplicates. Leave default as **Create New Prospect ❶**.

The screenshot shows a web form titled "Create Prospect". Under the "Prospect Details" section, there are three radio button options: "Create New Prospect" (selected), "Create from Existing Workers", and "Create from Resume/CV". A bracket labeled "❶" groups these options. Below this is a "New Prospect Details" section with several input fields: "Country" (dropdown menu showing "United States of America"), "First Name", "Middle Name", "Last Name" (grouped by a bracket labeled "❷"), "Email Address", "Country Phone Code" (dropdown menu showing "United States of America (+1)"), "Phone Number", and "ID Type" (dropdown menu). At the bottom left, there are "OK" and "Cancel" buttons, with a bracket labeled "❸" pointing to the "OK" button.

Figure 3

7. Once in the Prospect information window, enter all required and applicable fields ❶.
8. To attach documents, click on **Resume/Cover Letter** or **Other Documents** ❷, a box will appear with a **Select File** ❸ button to upload required documents as seen in **Figure 5** below. Follow all instructional prompts to upload documents.
9. Once all the fields are filled and required documents are uploaded, click **OK** ❹. A prospects dashboard will appear as seen in **Figure 6** on **Page 4**.

The screenshot shows a 'Prospect information' form with the following sections:

- Country:** A dropdown menu showing 'United States of America'.
- Legal Name:** Fields for First Name (John), Middle Name, Last Name (Doe), and Suffix.
- Contact Information:** Fields for Phone Device Type, Country Phone Code (United States of America (+1)), Phone Number (01234567890), Phone Extension, and Email (john.doe@foun.org).
- Address:** Fields for Address Line 1, Address Line 2, City, State, and Postal Code.
- Prospect Information:** Fields for Source, Experience Level, Source (United States), and Type (Domestic Candidate).
- Document Upload:** A tabbed interface with 'Experience', 'Resume / Cover Letter', and 'Other Documents'. The 'Resume / Cover Letter' tab is active, showing a 'Drop files here' area and a 'Select files' button (annotated with ❸).
- Summary:** A text area for a summary note.
- Experience, Education, and Language:** Each section has a 'NEW' button.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom left (annotated with ❹).

Annotations ❶, ❷, and ❸ are placed on the form to guide the user through the process of entering information and uploading documents.

Figure 5

You have now created a Prospect, and the dashboard will appear as seen in **Figure 6** below.

10. Next, click on **Actions ①** on the prospect dashboard and hover over **Job Application ②**, then click **Create Job Application ③**. A **Create a Job Application** pop-up window will appear as seen in **Figure 7** below.

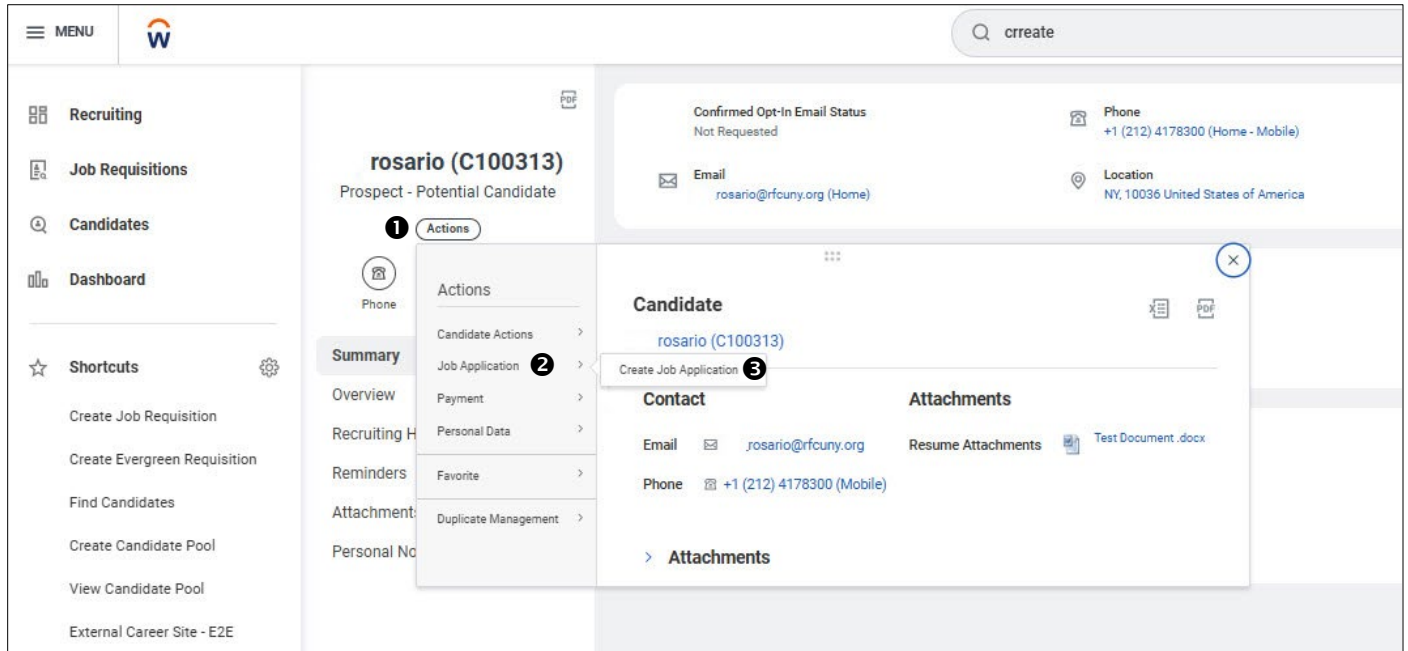


Figure 6

11. Choose the job from the **drop-down menu ④**, then click **OK ⑤**. This will open the full Create a Job Application window as seen in **Figure 8** on **Page 5**.

Please Note: Leave the **How would you like to fill out this job application** question choice to default on **Manually ⑥**.

The 'Create Job Application' pop-up window is shown. It has a title bar with a bookmark icon and a close button. The 'Candidate' field is populated with 'rosario (C100314)'. The 'Jobs' field is empty and has a drop-down menu icon, labeled with ④. Below these fields is the question 'How would you like to fill out this job application?'. There are two radio button options: 'Manually' (selected, labeled with ⑥) and 'Parse Information from a Resume/CV'. At the bottom, there are 'Cancel' and 'OK' buttons, with the 'OK' button labeled with ⑤.

Figure 7

In this **Create a Job Application** window, fill in all the required fields.

12. **Choose Source ❶** from the drop-down menu. Attach requires documents **❷**.
13. Enter all required fields in the **Experience** section by clicking on **Add ❸**. The Experience section will open up to fill in the required fields as seen in **Figure 8** below. Follow the same procedure for **Education ❹** and **Language ❺** if required.
14. After completing section, Click **OK ❻**, this will take you back to the main Project dashboard as seen in **Figure 9** on **Page 6**.

Create Job Application rosario (C100314) rosario@rfcuny.org

Jobs

Jobs Administrative Assistant - AP - 9/3/25 (Rehire)-1 (Expedited Recruitment)

Source ❶

Experience Resume / Cover Letter ❷

Summary

Experience

Add ❸

Education

Add ❹

Language

Add ❺

Experience

Company * x RFCUNY

Title * Admin

Location

Start Month December

Start Year * 2025

End Month December

End Year 2025

Currently Work Here ☐

Description

Remove

Add

OK Cancel

Figure 8

The Prospect has now become an Applicant. Under the **Summary** section ❶, one can now see the position under **Active Job Applications** ❷.

The next is to choose a **Move Forward** option ❸ by clicking on the button. This will open a pop-up box with choices as seen in **Figure 10** below.

Select **Offer** ❹, proceed with completing offer details and offer generation steps. If no offer letter is required.

When a prospect is moved to any of the stages in the **Move Forward** selections seen in **Figure 10** below, an email will automatically be sent to the candidates' home with a unique link so they can proceed with reviewing the necessary documents for hire.

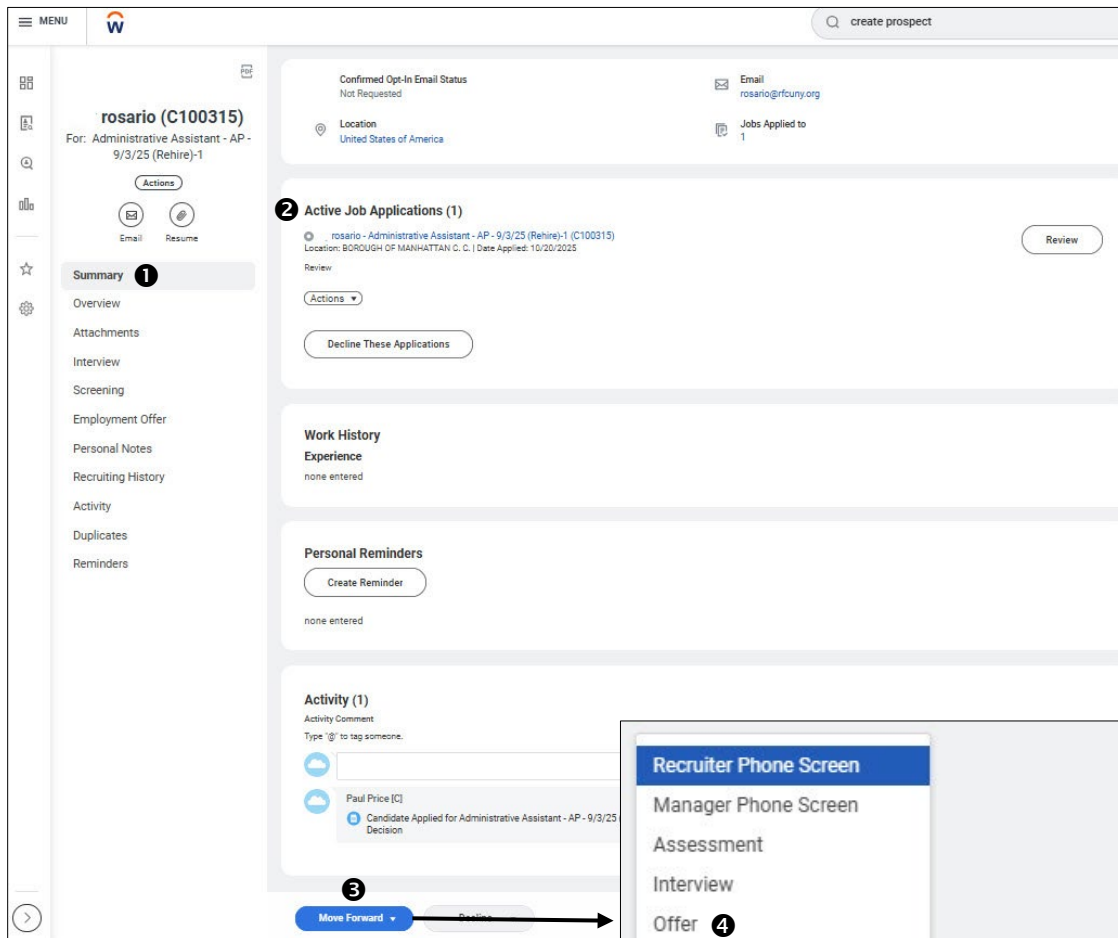


Figure 9

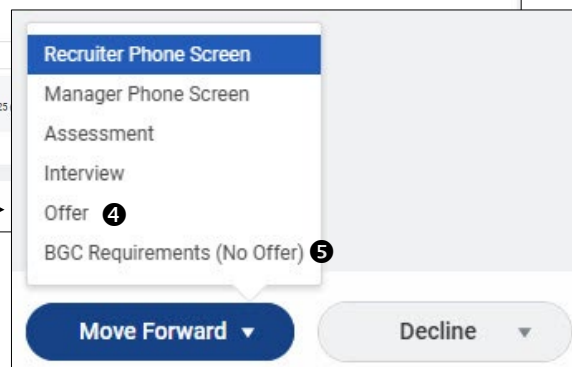


Figure 10

After choosing an option from the **Mover Forward** section in **Figure 11** below, click on the **Move Forward** button ❶, a pop-up **You have submitted** box ❷ will appear as seen in **Figure 12** below. By clicking on **Details and Process** links ❸, they will display details of the submission. In our example, details of the **Process** ❹ can be viewed. Click **Done** ❺ to exit onto the main dashboard screen.

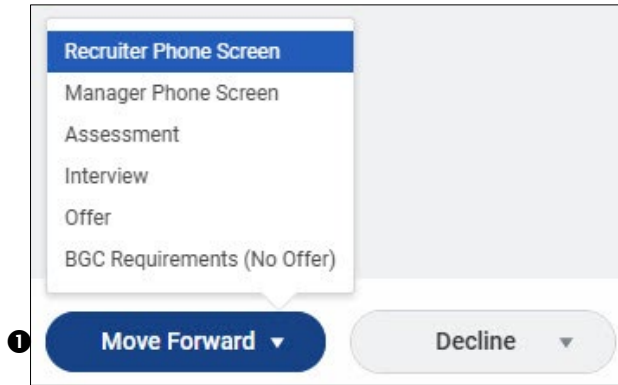


Figure 11

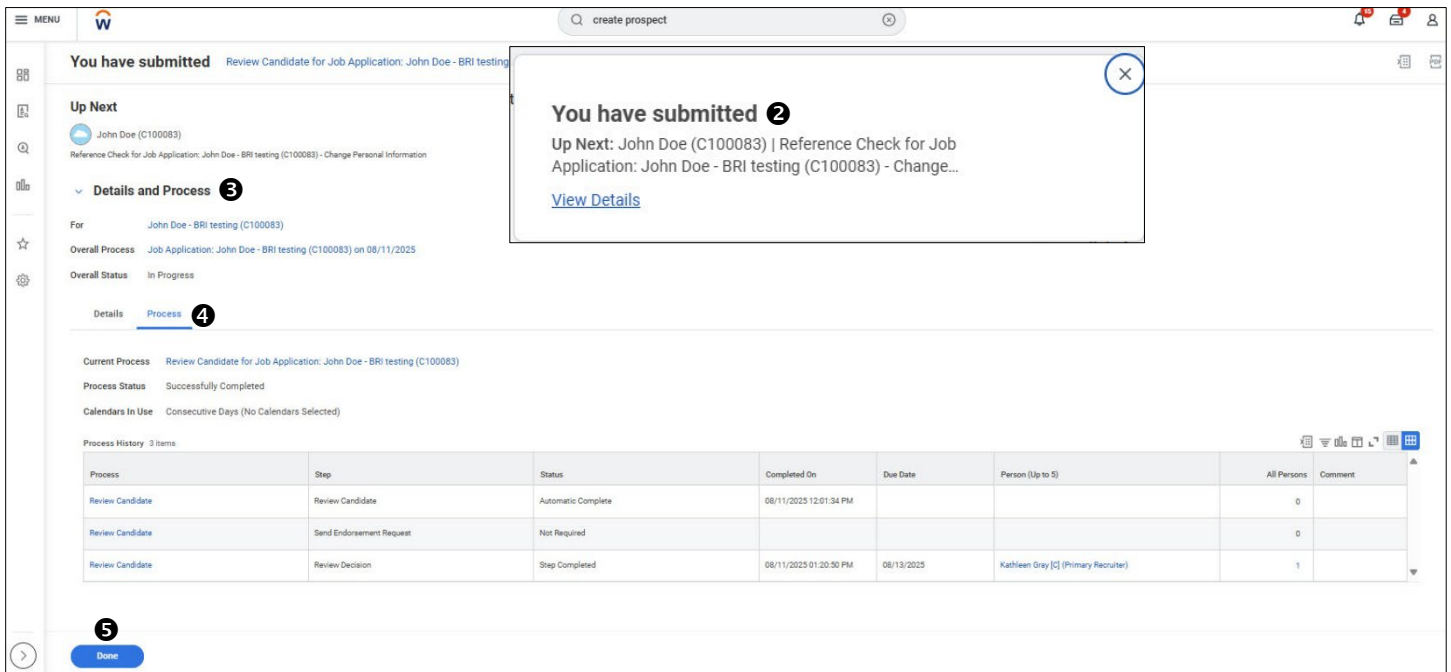


Figure 12

Please Note: If an offer has been made, follow the **Offer Process for Standard Recruitment (PI/Primary Recruiter)** user guide.