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

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**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.

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**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 Workflow 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

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**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