

## COATS

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### Online Applicant Entry Interface SQL version

**SITUATION:** COATS has created an Online Applicant Entry Interface and you need to know the steps on how to download the applications into COATS.

**NOTE:** Once downloaded the employee record will only be filled in with the information supplied on the application form. This does **NOT** include such information as SSN, tax statuses, ledger information etc. This information can be added when it becomes available.

#### STEPS:

1. Set up your **Password** for Online App Entry.
  - a. Log into **COATS**.
  - b. Click **Maintenance**.
  - c. Click **COATS Setup**.
  - d. Click **Global Preferences**.
  - e. Click **Set/Reset Download Web Applications Password**.
  - f. Enter the password (up to 20 characters) that you provided Coats on the **Online Web Application Questionnaire** form.
  - g. **Confirm the password**.
  - h. Click **OK**.
  - i. **Close** all open screens.
  
2. Set up your **Felony Question** and **Legal Disclaimer**.
  - a. Click on **Reports / Download Web Applications**.
  - b. Click on **Account Settings**.
  - c. The default Felony question is as follows: "**Have you been convicted of a felony**". If you want to change the terminology of this question, enter this here.

**PLEASE NOTE:** The check box indicates YES. Therefore be sure your verbiage is not created for a NO check box.
  - d. The default legal disclaimer statement is as follows: "**I certify that the information on this application is true and factual**." If you want to change that terminology of this statement, enter this here.
  - e. Click **Submit**.

**NOTE:** The changes to the verbiage are on the online web application only. This does not change the defaults within the Coats program. If you plan on printing out the application after downloading online applications into Coats, the default forms (formal clerical, formal industrial and formal custom skills) will need to be modified to reflect your Felony Question and/or Legal Disclaimer. **PLEASE CONTACT LISA NAYLOR WITH COATS TECHNICAL SUPPORT at 757-499-7652 OR EMAIL HER AT [lnaylor@coatssql.com](mailto:lnaylor@coatssql.com) TO MODIFY YOUR REPORTS.**

3. **Retrieve applications** submitted online.
  - a. Click **Reports**.
  - b. Click **Download Web Applications**.

- c. **Preview applications** if desired by clicking on the preview button for each application.
- d. Click **Main Screen/Refresh** to go back to the application listing.
- e. Once applications have been previewed click the **Download** check box for the applications you wish to download, you may also click the **Delete** check box for any applications you wish to delete without downloading them.
- f. Click **Update**.
- g. Click **OK** to the message '**xx applications ready for download**'.
- h. Click **Get Applications**.
- i. If the exact same employee name already exists in your system a box will appear telling you that name already exists and asks you if you want to download anyway choose **OK** or **Cancel**. If no names are duplicated proceed to step J.
- j. Click **OK** to the message **All Finished**.
- k. **Close** all open screens.
- l. You may now access those applicants downloaded in the Employee screen.

**PLEASE NOTE:** The applicant will appear based upon View.

#### 4. Online Applicant Report.

- a. Click **Reports**.
- b. Click **Online Applicant Report**.
- c. Select a **Date Range**.
- d. Choose from one of the print options.

**NOTE:** This report shows all online applicants based upon the user's view. It will show the date the applicant applied and if there have been any follow up contact by staff. These notes are generated from the **Employee / CONT** window.

#### 5. Printing the Formal Application.

- a. Click **Employees**.
- b. **Find** Employee.
- c. Click **Print** icon.
- d. Select under Formal Application, **Clerical, Industrial** or **Custom**.
- e. Choose from one of the print options.

**NOTE:** This application is used for when the applicant comes to fill out their legal I-9, W4 paperwork. It can be printed as a review, for a hard copy, and if desired for signature of the legal disclosure. **IF YOUR LEGAL DISCLAIMER AND/OR FELONY QUESTION(S) VERBIAGE WAS CHANGED FROM THE COATS DEFAULTS (in step 2 above), PLEASE CONTACT LISA NAYLOR WITH COATS TECHNICAL SUPPORT at 757-499-7652 OR EMAIL HER AT [lnaylor@coatssql.com](mailto:lnaylor@coatssql.com) TO MODIFY YOUR REPORTS.**