MONTANA STATE UNIVERSITY – PEOPLEADMIN ATS – SEARCH MANAGER GUIDE

Instructions for Role of **Search Manager in ATS**:

- LOGIN INSTRUCTIONS
- MOVING POSTING IN WORKFLOW
- EVALUATION REVIEW
- MOVING APPLICANTS IN WORKFLOW
- NOT SELECTED APPLICANTS
- RECOMMEND FOR HIRE
- HIRING PROPOSAL

Search Manager Duties:

- Prepare the RAF, obtain approvals and submit to HR in system.
- Schedule and attend the Search Committee Orientation.
- Track and manage the status of applicants in the ATS. As candidates' status change, the Search Manager moves the applicant and posting into the appropriate workflow status in the ATS.
- Schedule all search meetings and gather all search documentation from Search Committee Members.
- Scan and enter all search materials into ATS; shred all hard copies after entry into ATS.
- Arranges interviews, equipment (phone, Skype, on-campus room, etc.) and travel accommodations as needed.
- Prepares interview itineraries. Distributes itineraries to the applicants, Search Committee and other participants as appropriate.
- Prepare the list of unranked finalists recommended by the Search Committee.
- Prepare the Hiring Proposal for the Search Committee or Hiring Authority for HR approval.
- Upon the selection of the finalist, coordinate with HR for approval of the Hiring Proposal.
- Coordinates with HR regarding hiring approval and background check for the finalist(s).
- Collects all documentation from Search Committee Members; scan and attach to the Hiring Proposal in ATS.
- Refer any complaints, concerns or issues to the Search Chair, Hiring Authority or HR.

LOGIN

Login Page

- https://jobs.montana.edu/hr

User Name: NetID
Password: password associated with NetID

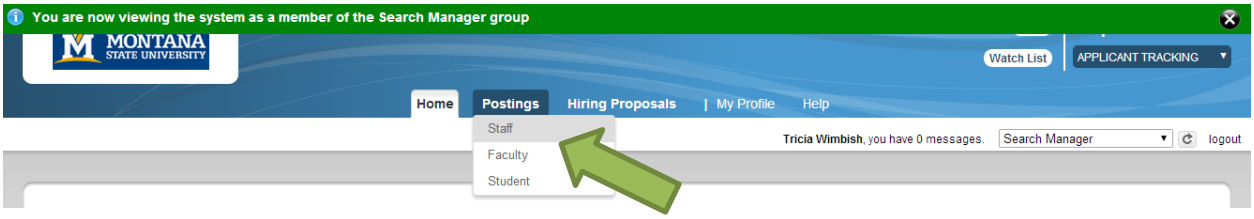
**Error message of "LDAP Credentials Failed" go to the ITC link and update you NetID password, for the network:* https://www3.montana.edu/myprofile/

NOTE: The online Applicant Tracking system (ATS) works best with Chrome, Firefox, or Safari (5 or higher). It is recommended that you utilize one of these Internet Options.

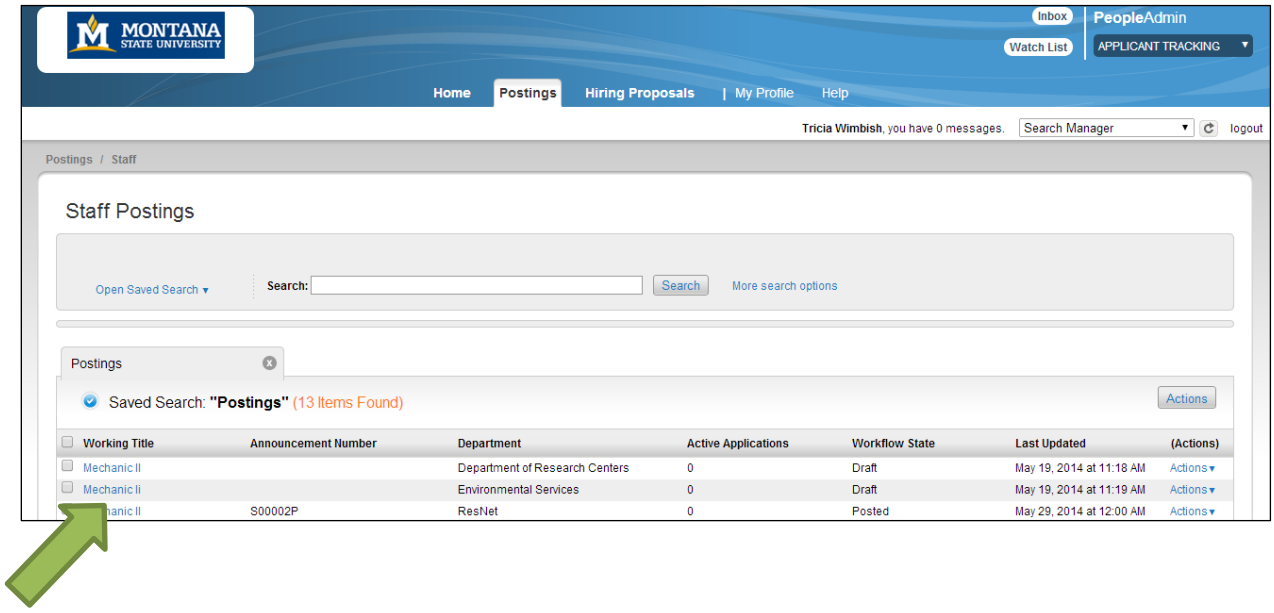
Inactivity of 60 minutes will time you out of the system and you will lose any unsaved data.

Clicking "Next" on any page will automatically save the page and move you to the next page. "Save" saves the current page without advancing to the next step.

- The green message bar indicates you are viewing the system as a member of the Search Manager group
- Click the **Postings** tab
- Select the type of posting (**Staff or Faculty**)



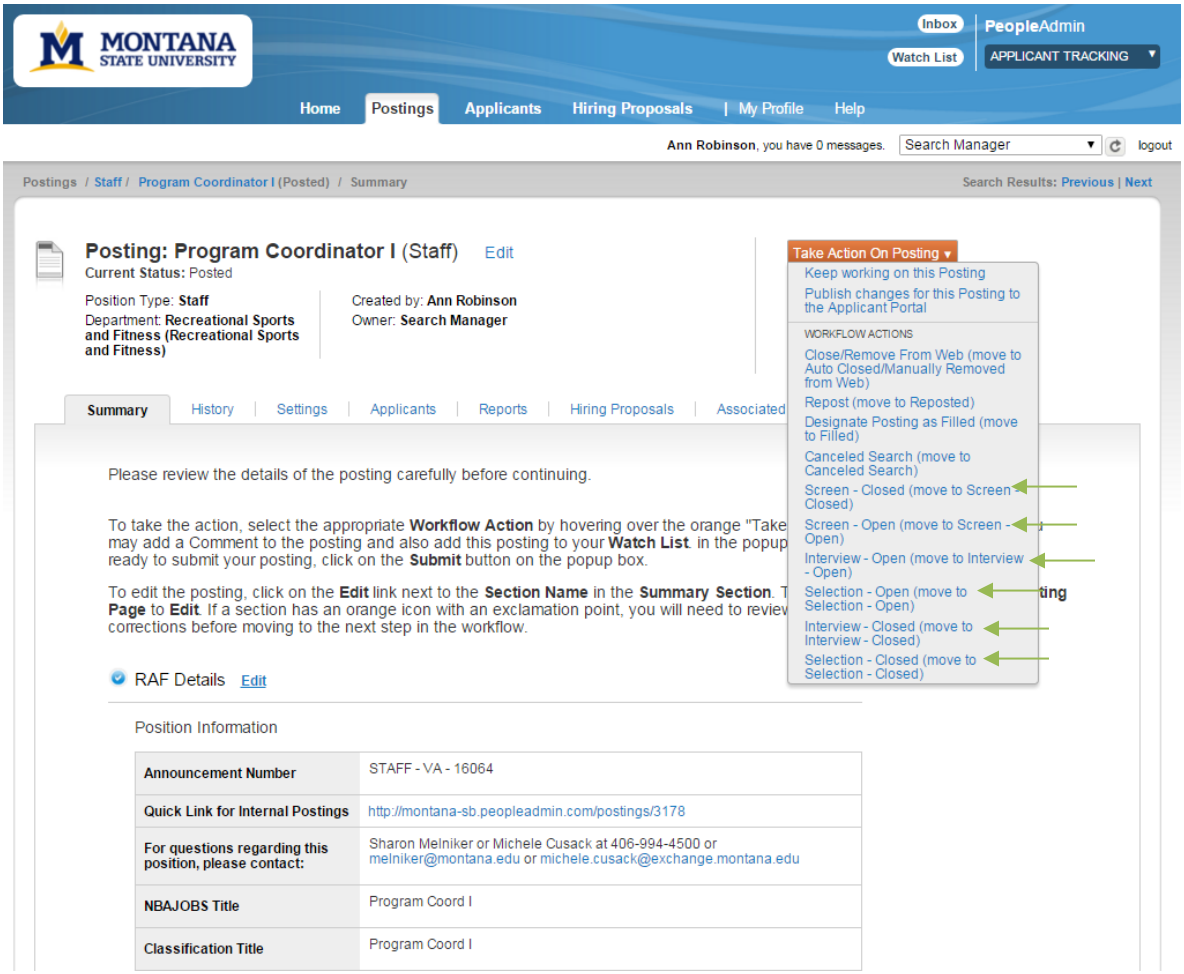
- In the Working Title column, select the appropriate position by clicking on the title



MOVING POSTING IN WORKFLOW

As Search Manager your responsibility is to move the posting and applicants through the workflow steps to be able to track this information for reporting purposes for MSU and federal agencies.

** For reporting any moves are time stamped. Make sure to be moving posting throughout the process to support our Federal/State reporting requirements. **

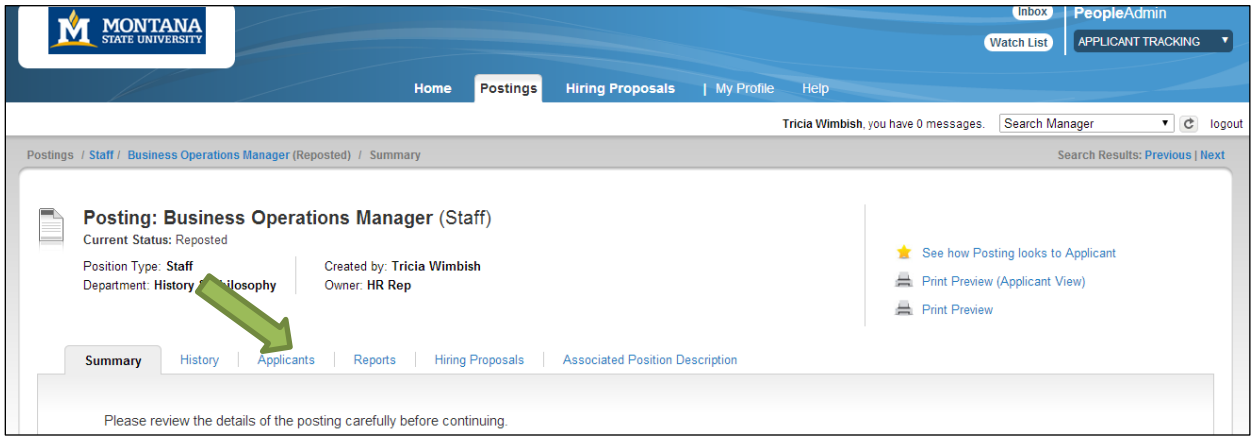


States can be either Open (still posted on the web and accepting applications) or Closed (removed from the web and no longer accepting applications).

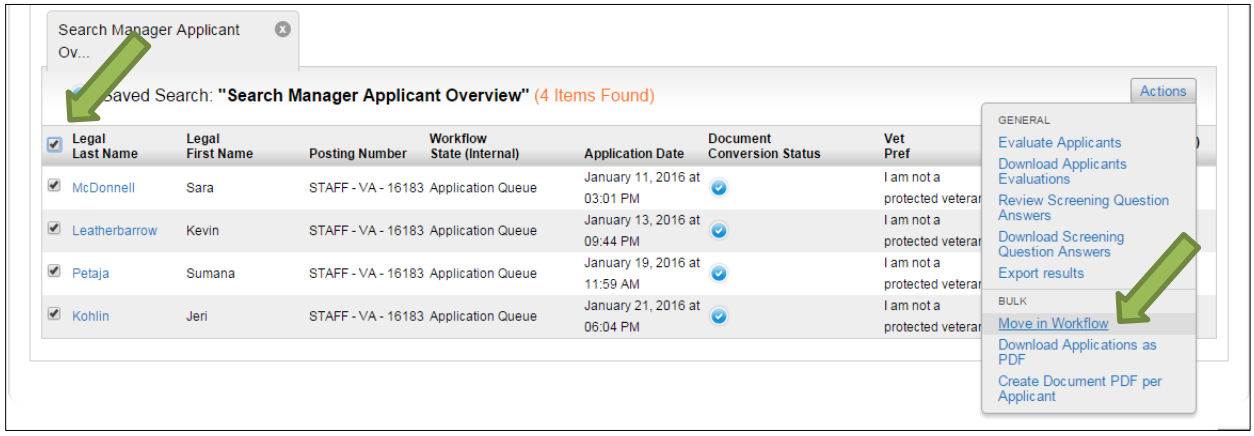
<u>CLOSED OPTIONS AVAILABLE ONLY IF HR HAS REMOVED FROM WEB</u>

Screen – Open **or** Screen – Closed:	Evaluating Applications
Interview – Open **or** Interview – Closed:	Interview Process has begun
Selection – Open **or** Selection – Closed:	Working on Final candidates or Hiring Proposal

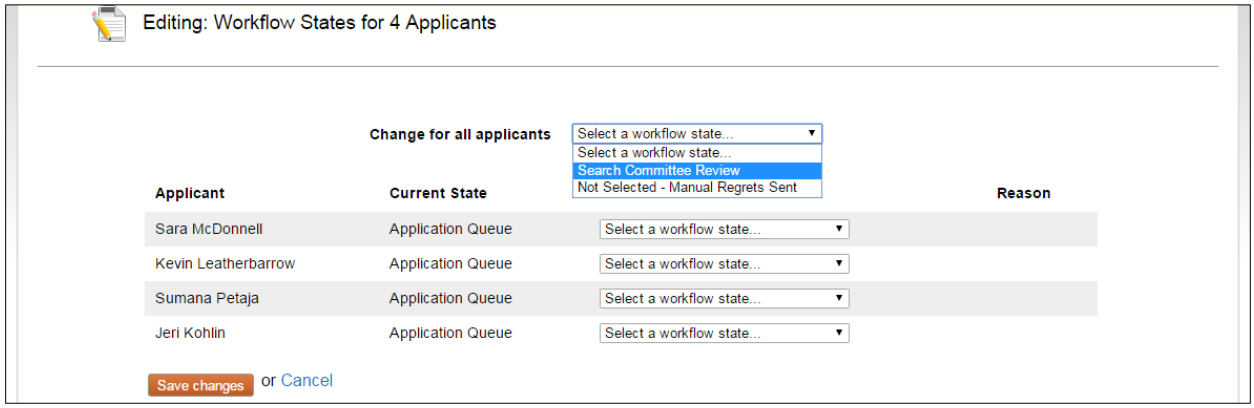
EVALUATION REVIEW



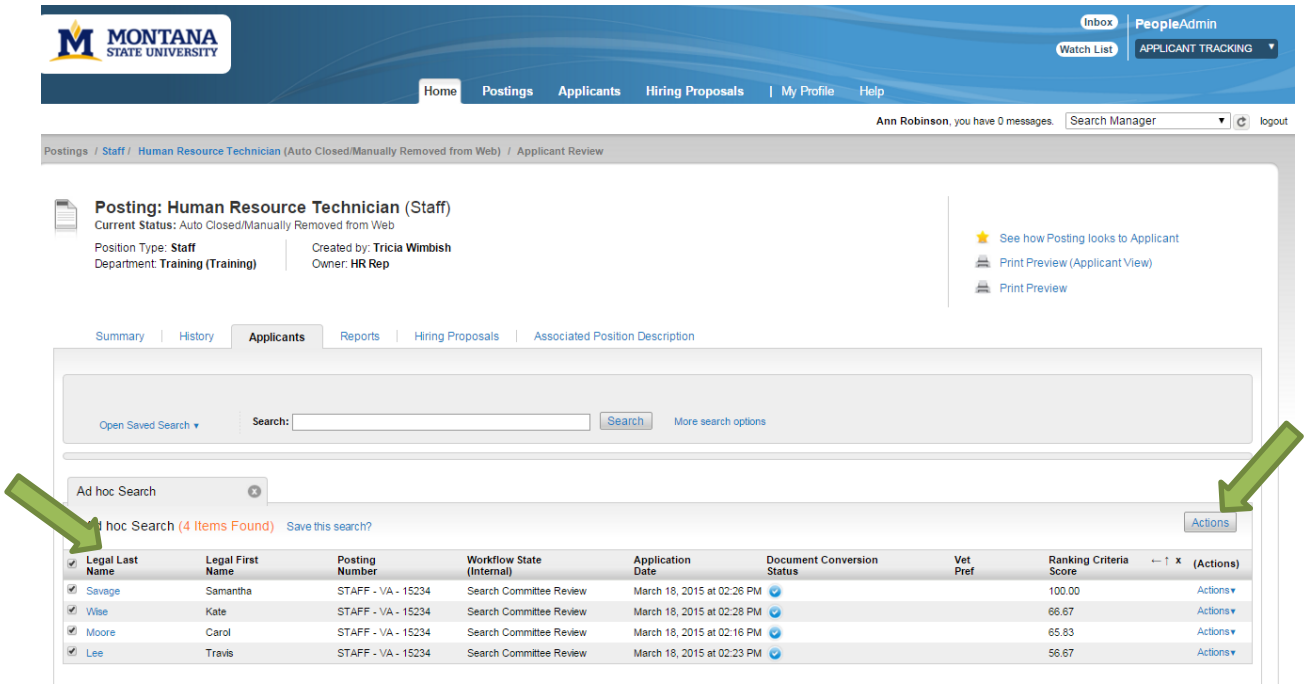
- Click on the **Applicants** tab



- Select **Move in Workflow**

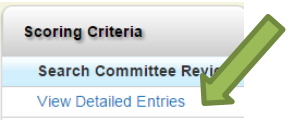


- Select **Search Committee Review**
- **Save Changes**
- Once applicants are moved alert Search Committee that applications are ready for review



Once the Search Committee Members have evaluated the candidates, the Search Manager has the ability to **Use the system scores generated** or create the scoring matrix (our former Excel Scoring Matrix).

- Use the ↓ next to **Ranking Criteria Score** to sort applicants by score
- Click the box by "**Legal Last Name**" to select all of the applicants
- Click the Actions button selecting **Evaluate Applicants**
- **If State or Federal Vet Pref selected - those candidates *must be* discussed by committee**



Then **View Detailed Entries**

Full Name
Carol Moore
Travis Lee
Samantha Savage
Kate Wise

Click on an applicant's name to see who has scored

Workflow State: Search Committee Review

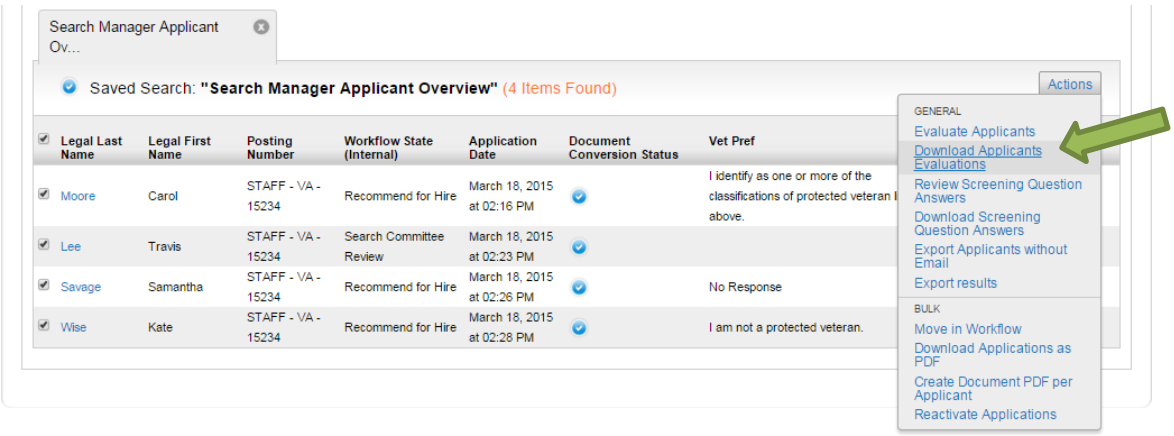
Reviewer Name	UnivComm - Marketing Strategist - equivalency of education and experience (weight: 1)	MSU - Experience (weight: 1)	EHHD Personnel Assoc I - pref2 (weight: 1)	Comments
Sharon Stoneberger	<no value entered>	<no value entered>	<no value entered>	N/A
Tricia Wimbish	Candidate exceeds this qualification - 4 points(4.0 points)	Candidate exceeds this qualification - 3 points(3.0 points)	Candidate exceeds this preferred qualification - 2 pts(2.0 points)	N/A
Ann Robinson	Candidate meets this qualification - 2 points (2.0 points)	Candidate meets this qualification - 2 points(2.0 points)	Candidate meets this preferred qualification - 1 pt(1.0 points)	N/A
Katarzyna Maison-Franklin	<no value entered>	<no value entered>	<no value entered>	N/A
Average Score	3.00 points	2.50 points	1.50 points	
Total				65.83

This will give a detailed list of each committee member and their score for this applicant.

OR

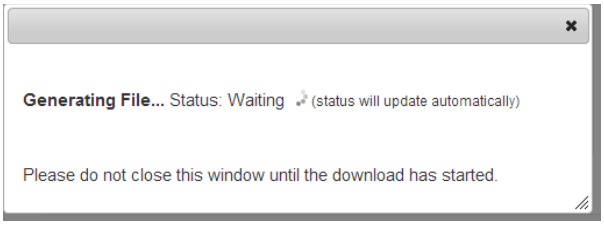
The Search Manager has the ability to create the scoring matrix (our former Excel Scoring Matrix).

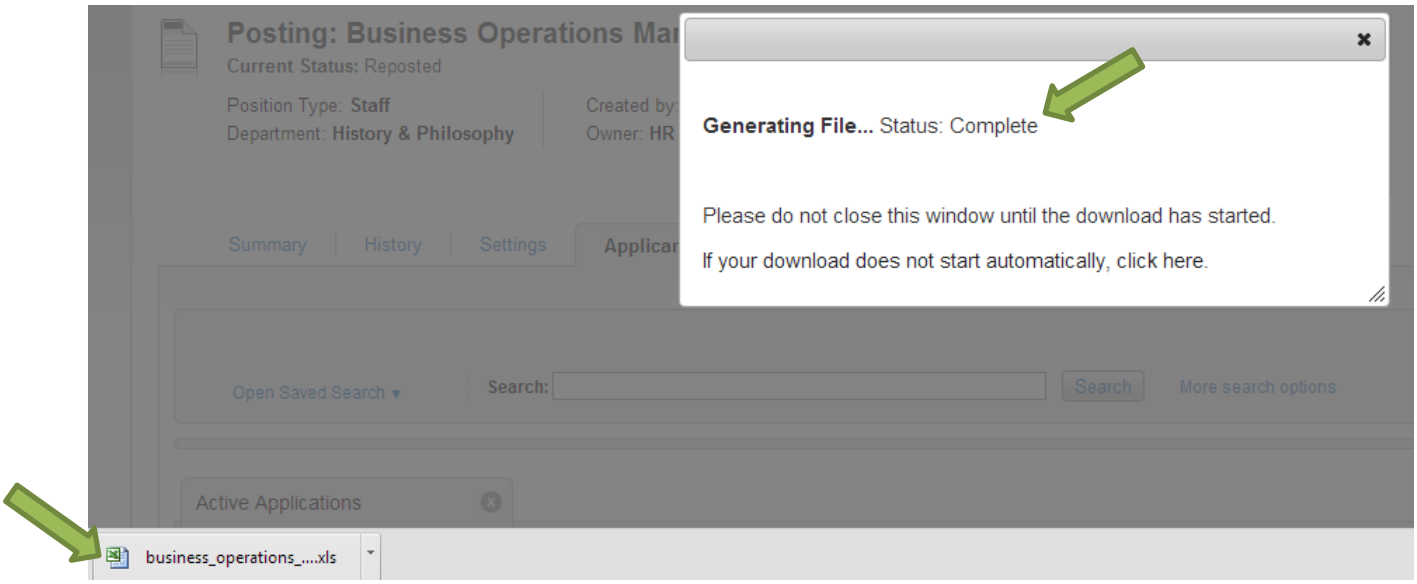
- Use the ↓ next to Ranking Criteria Score to sort applicants by score
- Click the box by "**Legal Last Name**" to select all of the applicants
- Click the **Actions** button



- Select the "**Download Applicants Evaluations**"

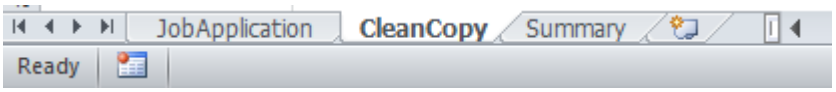
This message box will appear:





- When the file has generated, the Status will appear as "Complete"
- The Excel spreadsheet will be at the bottom (in Chrome); click the button to open

The spreadsheet will be quite large and will need to be edited into a more user-friendly spreadsheet.

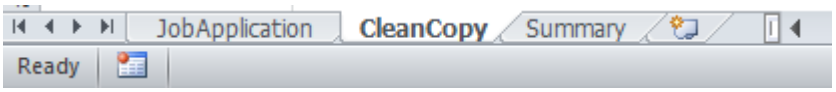


- Copy the spreadsheet that the system generates (JobApplication) and paste into a new sheet within the same file
- Rename the tab to "Clean Copy" (this protects the integrity of the search and will be essential during an audit or litigation)

To clean up the spreadsheet:

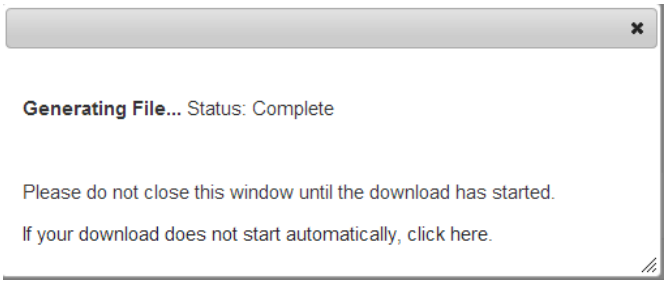
- Change the font size for Row 2 to 10
- Hide the following columns:
  - Applicant ID
  - Current State
  - Columns with the word answers (for the spreadsheet, we want the point values – the JobApplication sheet will contain all of the original information)
- Copy the Search Committee Member name and paste in the column to the right
- Insert a column and highlight in a different color
- Label the new column "Total – Name" (Replace Name with the Search Committee Member's Name)
- Enter a formula to add the scores of the Search Committee Member for the first applicant (formula is =sum(column letter:column letter)
- Copy the formula in that cell down for all of the remaining candidates
- Once the columns have been cleaned up, add a final column and label it "Grand Total"
- Enter a formula to add the total scores from each Search Committee Member for each applicant

- Add an additional worksheet and label it “Summary”



	A	B	C	D	E	F	G	H	I
1	**Candidate Name**		**Todd Crane**	**Todd's comment**	**Linda David**	**Linda's comments**	**Erica Dungan**	**Erica's comment**	**TOTAL**
2	Carol	Moore	12		25	Candidate has exceptional customer service experience.	33	20 years experience	70.0
3	Trevor	Taylor	8		20	Candidate's level of experience is outstanding.	16.5		44.5
4	Susie	Jones	14		10	Candidate does not have experience in Business Operations.	33		57.0
5	Stephanie	Barnes	5		10	Candidate's personality is especially conducive to this position.	31.5		46.5

- Create the header row (Row 1)
- Reference the information from the JobApplication tab
  - Formula to reference cells (=jobapplication!columnnumber)
- Save the Excel spreadsheet (this will be uploaded to the Hiring Proposal for documentation)
- Please see the Excel “Scoring Matrix Example”



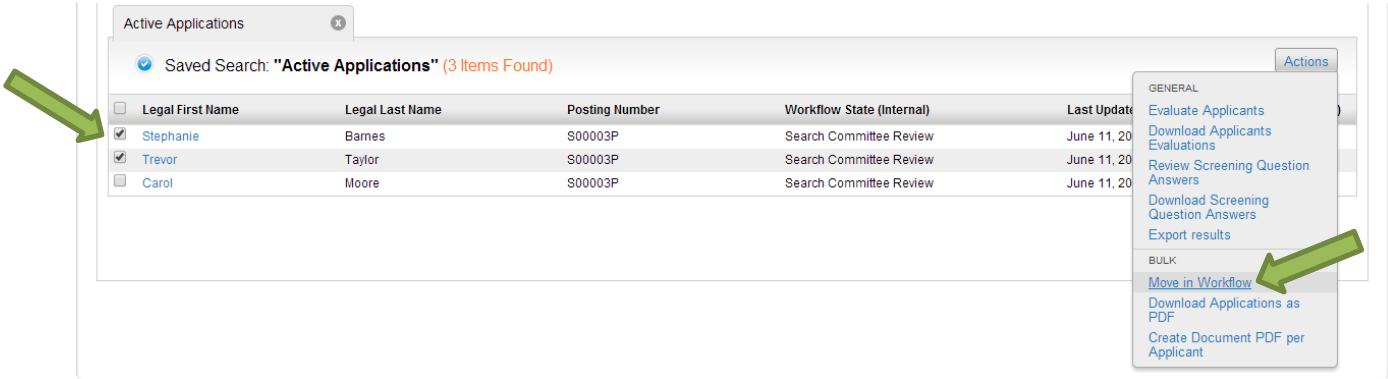
- Once the spreadsheet has been saved, click on the x to close this message box

MOVING APPLICANTS IN WORKFLOW

Once the Search Committee meets and discusses the applicants and decides which applicants to move forward in the search, the Search Manager can move each applicant from the "Search Committee Review" Workflow State into a new Workflow State. For reporting any moves are time stamped. Make sure to be moving candidates throughout the process to support our Federal/State reporting requirements.

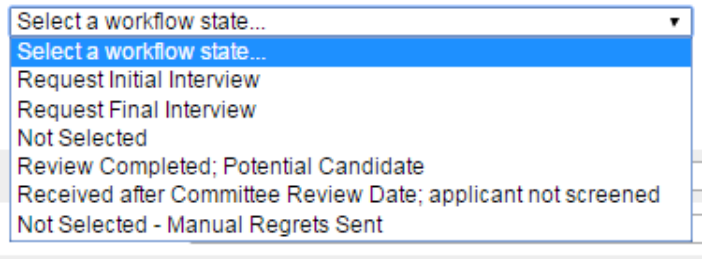
Note: The Search Manager owns certain Workflow States. Once an applicant has been moved to a Workflow State that another role owns, that applicant is not accessible. This means that the Search Manager will not have the same options under "Actions" as they do when the applicant is in the Workflow State of "Search Committee Review". Instructions will follow on how to view the options to move the remaining applicants to a different workflow.

- Select the applicants that the Search Committee wants to conduct interviews for by clicking the box next to the applicants name (you have the option to move the applicants one at a time or several at once)



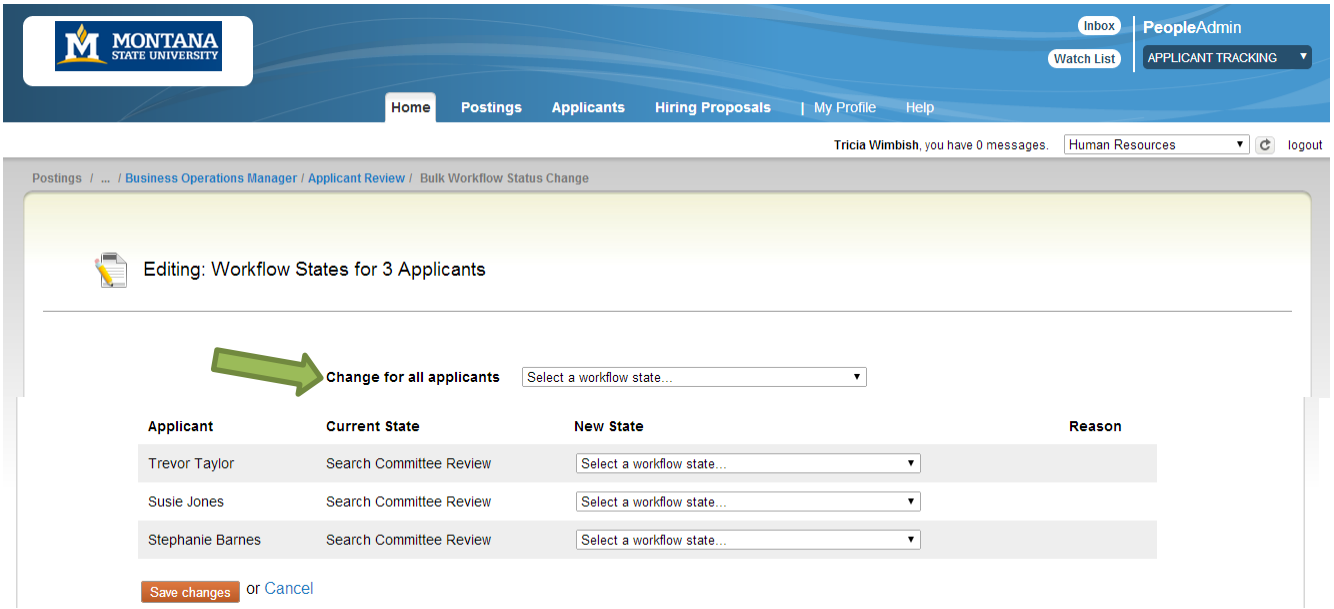
- Click the **Actions** button
- Select **Move in Workflow**

The following are the Workflow Options that are available for the Search Manager to select for either all applicants or per applicant:



- Request Initial Interview – can be phone, off campus (hotel), or web (Skype) interview
  - HR will move to Approved Initial Interview
- Request for Final Interview – on campus interview
  - HR will move to Approved Final Interview
- Reference checks
- Not Selected – Search Committee, by consensus, agreed not to advance this applicant (This will generate Regret email)
- Not Selected – Manual Regrets Sent (Will not generate email, use for phone or personal regrets.)

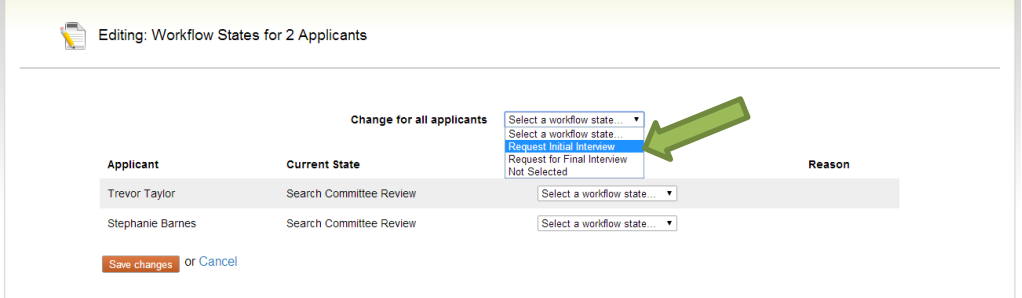
Note: When an option is selected, the action is moved to Human Resources for review and approval.
** For reporting any moves are time stamped. Make sure to be moving candidates throughout the process to support our Federal/State reporting requirements. **



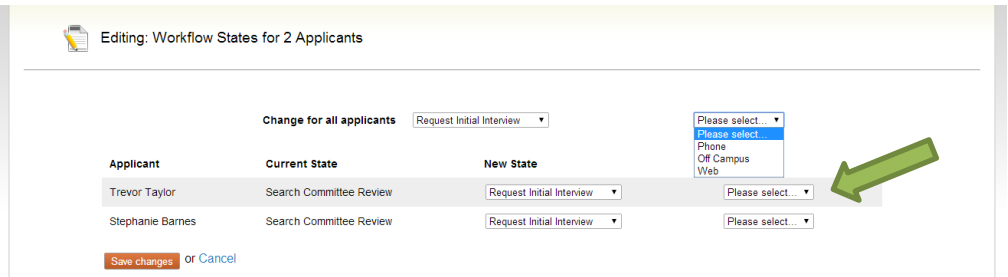
Options

- The Search Manager has the option to change the workflow state for all applicants listed **OR**
- The Search Manager has the option to change the workflow state one applicant at a time

Option – Change for all applicants:

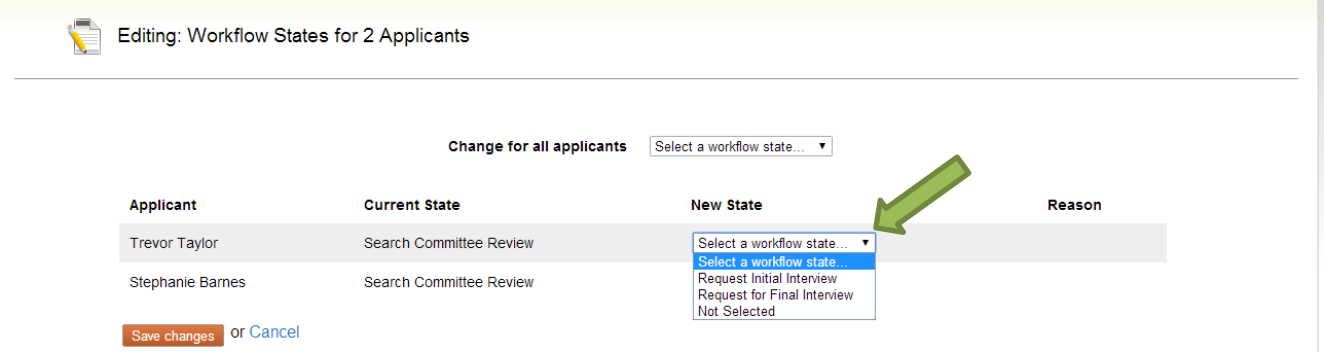


- Click the drop down arrow under "Change for all applicants" and select the appropriate option

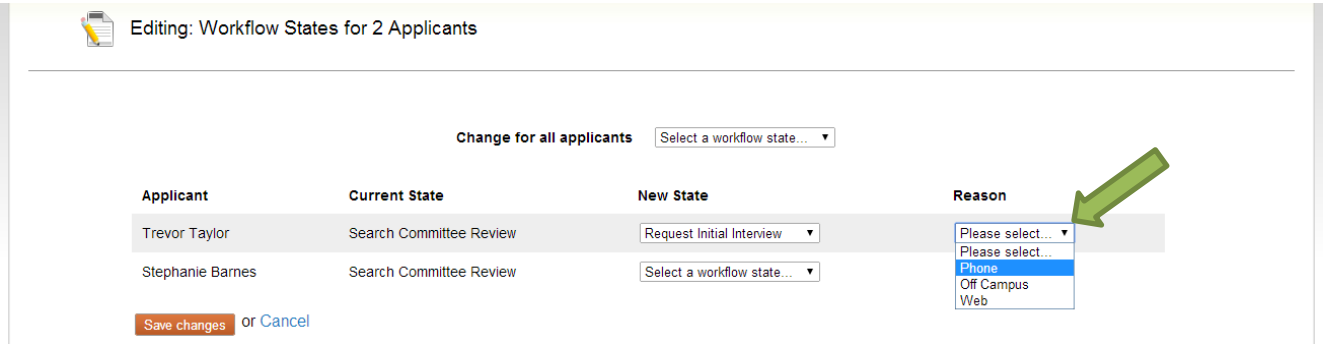


- Click the next drop down arrow to select the type of interview
- Click **Save Changes** to save OR
- Click **Cancel** to cancel the action

Option – Change one applicant at a time:

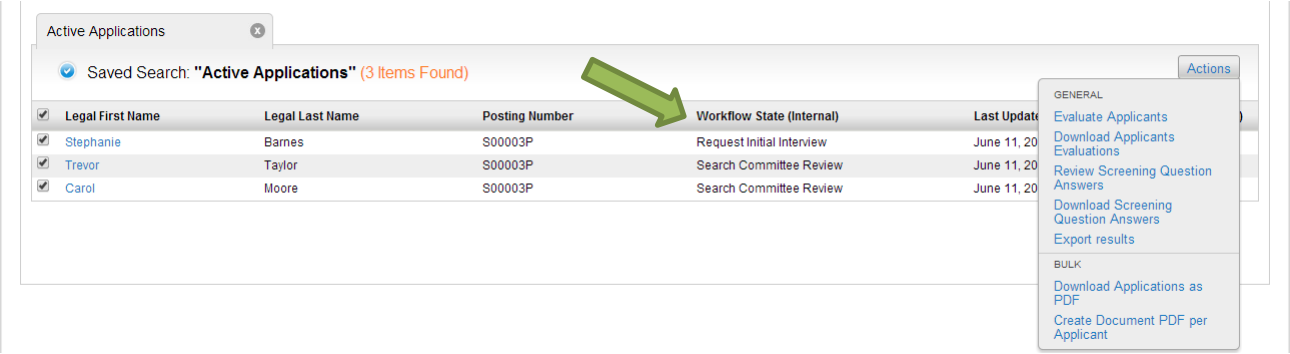


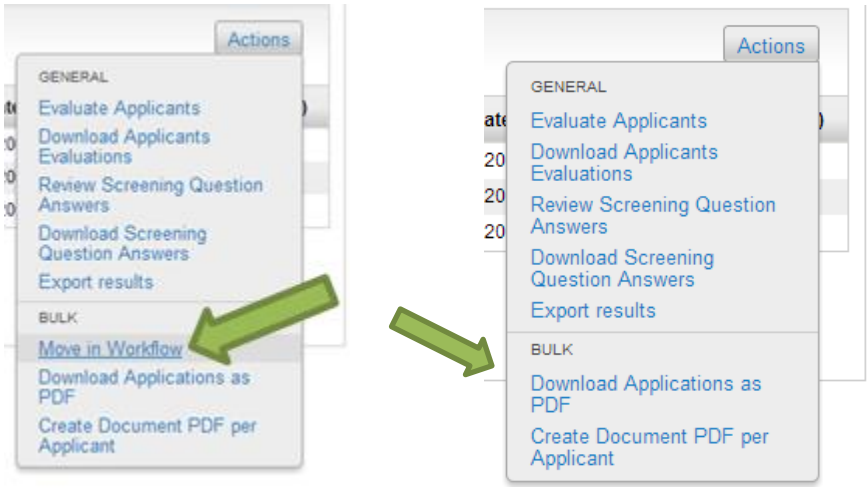
- Click the drop down arrow under New State one applicant at a time and select the appropriate option



- Click the drop down arrow under **Reason** and select the type of initial interview
- Click **Save Changes** to save OR
- Click **Cancel** to cancel the action

- Once a new Workflow State has been selected for an applicant, it will be indicated as shown here:



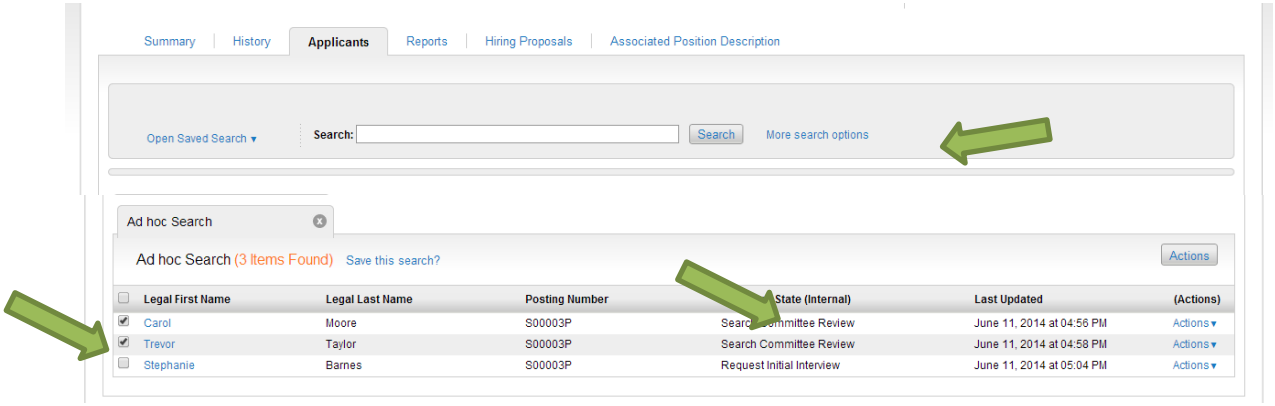


- After applicants have been moved to a new Workflow State, the menu options under the Actions tab change as shown here. The "Move in Workflow" option is no longer available.

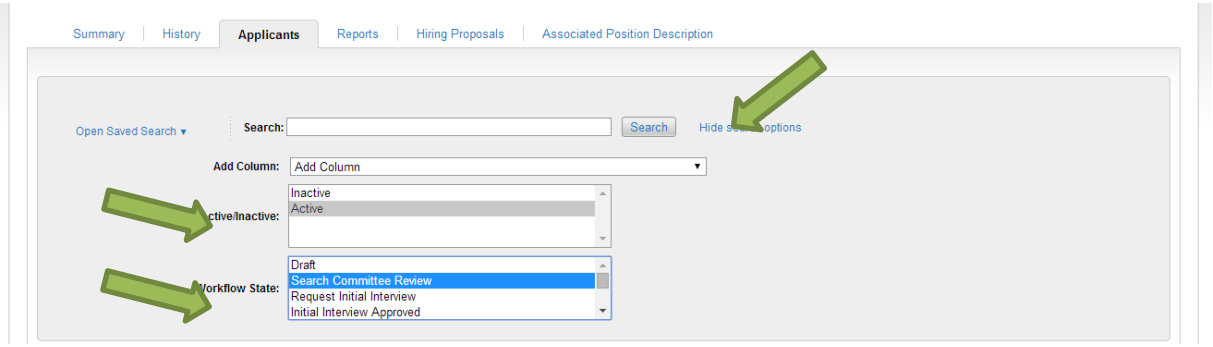
**** For reporting any moves are time stamped. Make sure to be moving candidates throughout the process to support our Federal/State reporting requirements. ****

MOVING APPLICANTS

To access the applicants that are still in the "Search Committee Review" Workflow, follow these steps:



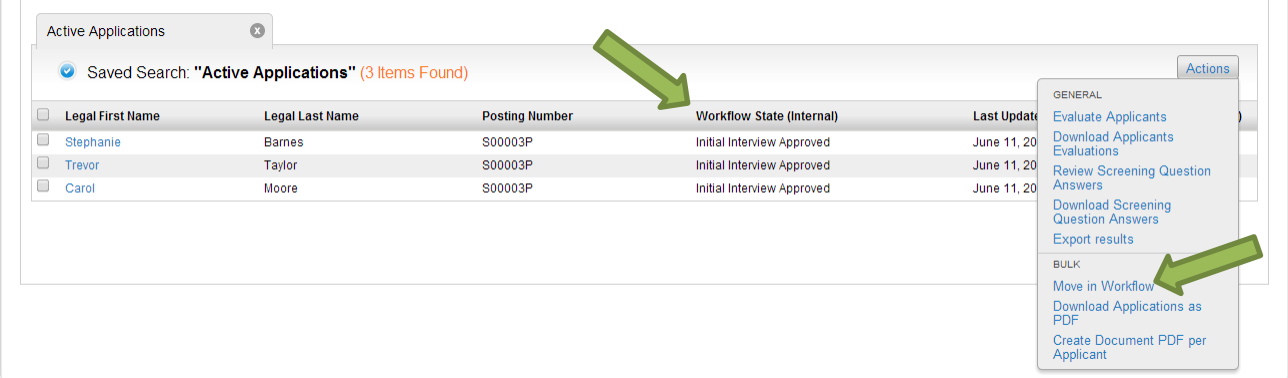
- Select the applicants in the Workflow State of "Search Committee Review"
- Click "More Search Options"



- Active/Inactive: Click Active
- Workflow State: Click Search Committee Review
- Click Search

- The option "**Move in Workflow**" is now available for the remaining candidates in "**Search Committee Review**".
- The Search Manager can now move the remaining candidates to the appropriate Workflow State.

REMINDER: When an option is selected, the action is moved to Human Resources for review and approval.

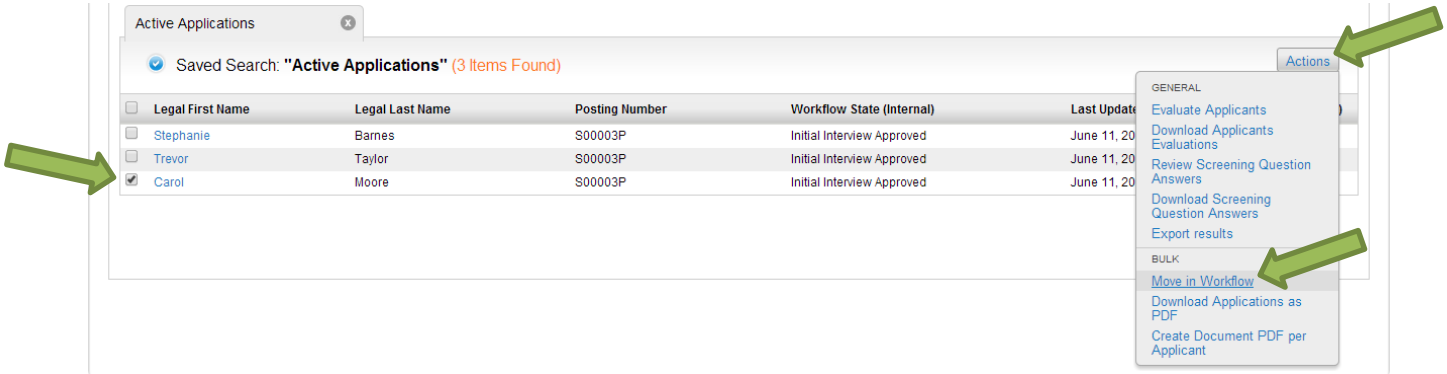


- When Human Resources approves the applicants for the requested Workflow State, the system will update and the Workflow State will update to an Approved status.
- The **"Move in Workflow"** option will now be available to the Search Manager.
- Request **Initial Interview** and **Request Final Interview** both need to be approved by Human Resources
- Applicants may be locked if there are some applicants are in an HR approval queue.
- Repeat the steps in this manual to continue to move applicants through the various Workflow States until an applicant has been selected to hire.
- A hiring proposal cannot be started unless a candidate is in state **"Recommend for Hire"**

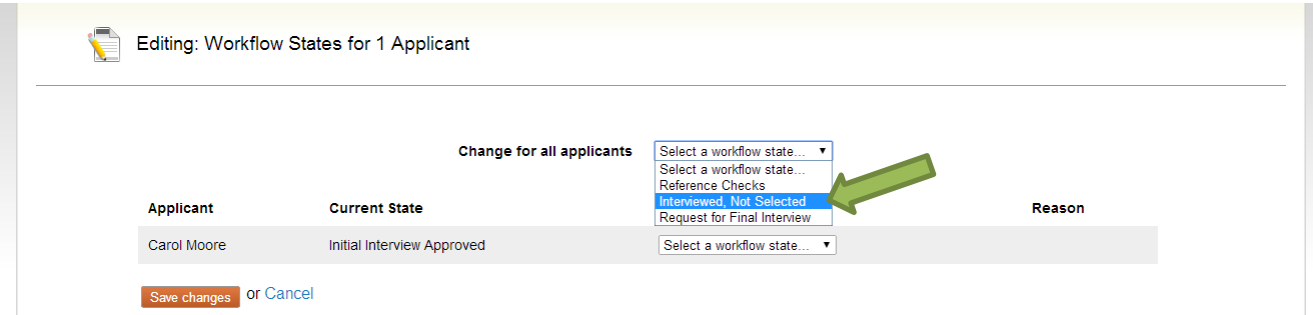
**** For reporting any moves are time stamped. Make sure to be moving candidates throughout the process to support our Federal/State reporting requirements. ****

NOT SELECTED APPLICANTS

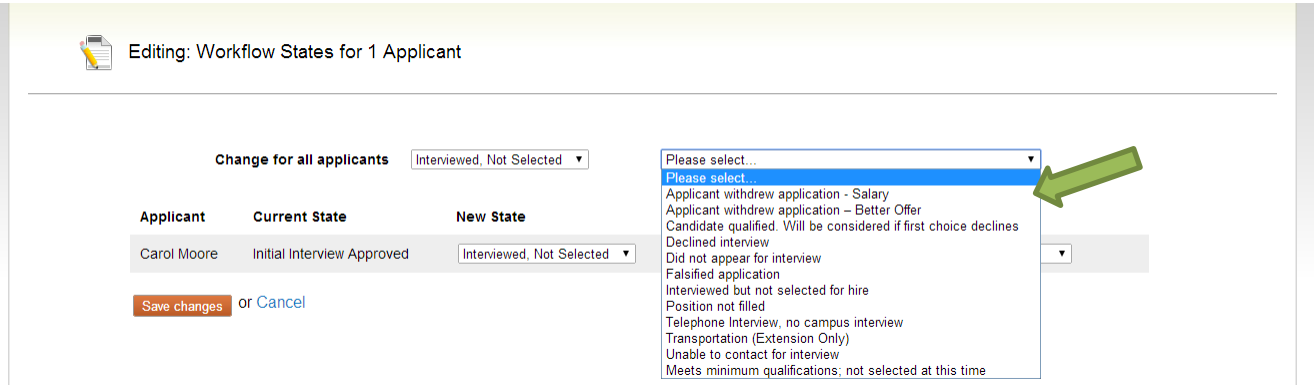
How to address the "Not Selected Applicants":



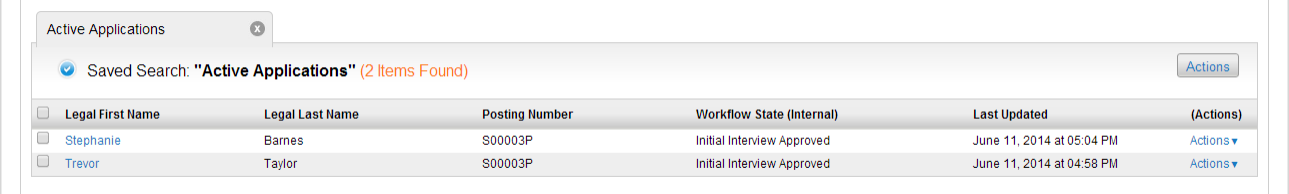
- Click the box by the applicant's name who has been selected not to advance in the search process
- Click the **Actions** button
- Select "**Move in Workflow**"



- Click the drop down arrow for **Change for all applicants**
- Select Interviewed, Not Selected



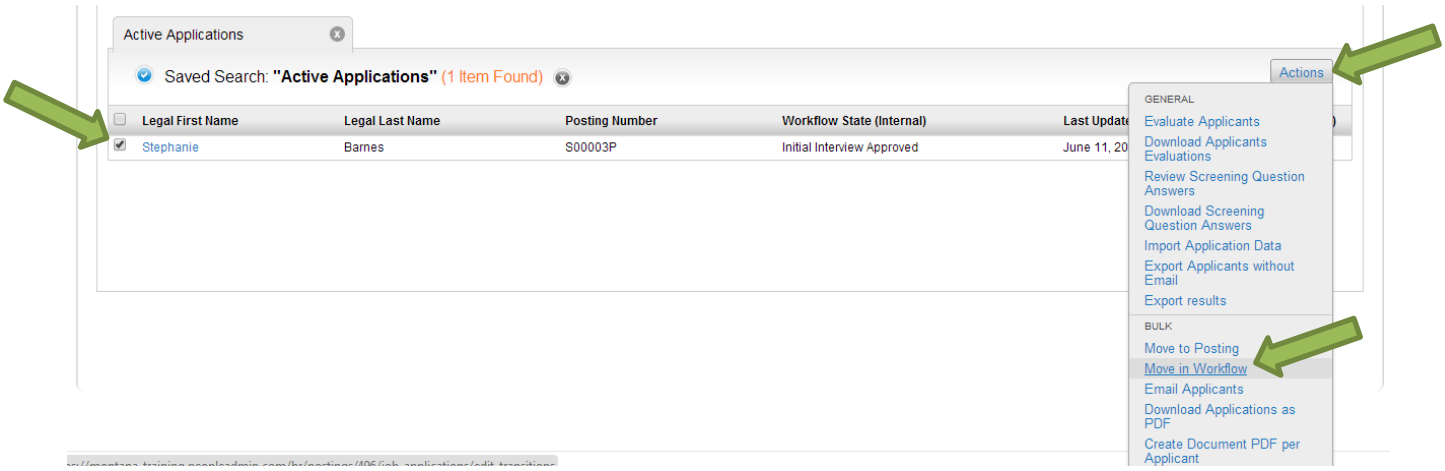
- Click the drop down arrow and select the reason why the applicant was not selected
- Click **Save Changes** OR
- Click Cancel



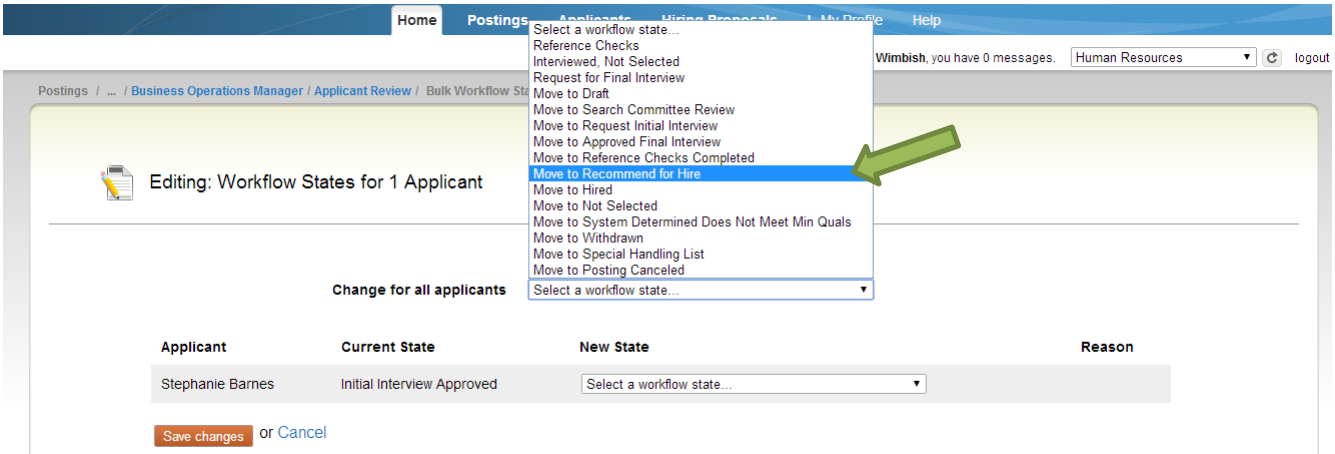
- This applicant is no longer visible (the candidate can be found utilizing the Search function)

RECOMMEND FOR HIRE

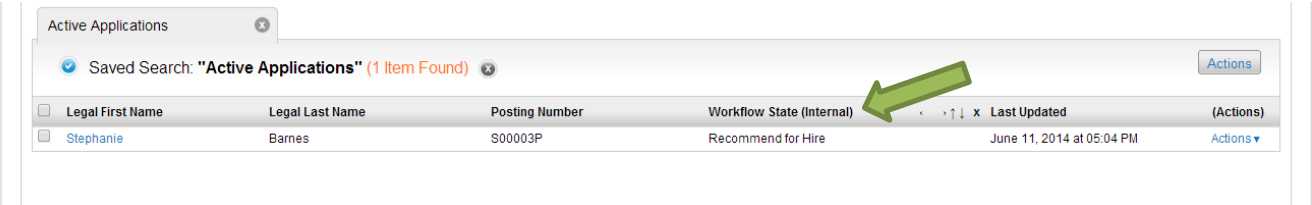
When an applicant has been identified by the Search Committee as to who they want to recommend for hire, follow these steps:



- Click the box next to the applicant's name
- Click the **Actions** button
- Select "**Move in Workflow**"



- Click the drop down arrow for Change for all applicants
- Select "**Move to Recommend for Hire**"
- Click **Save Changes** OR
- Click **Cancel**



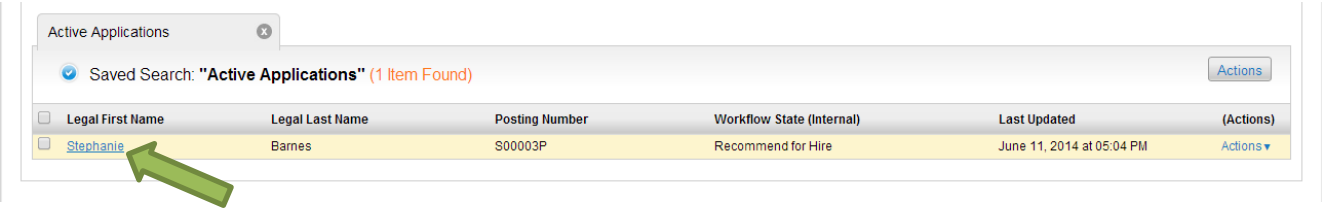
- The Workflow State will update to "**Recommend for Hire**"
- Once candidate is in state **"Recommend for Hire"** hiring proposal can be started.

HIRING PROPOSAL

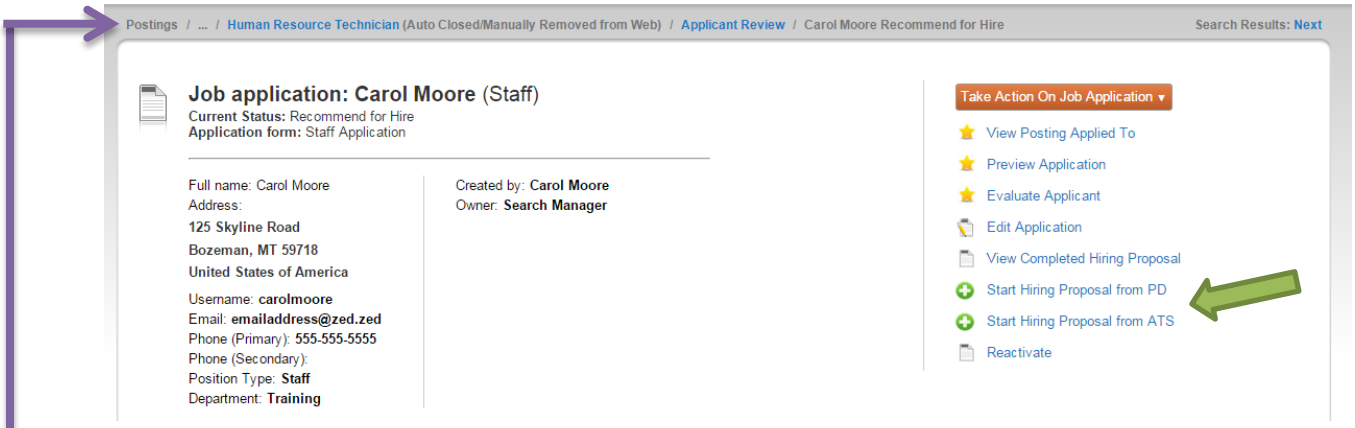
Note: A Hiring Proposal can be initiated by:

- Search Manager
- Hiring Authority
- HR Rep
- Human Resources

To Initiate the Hiring Proposal, follow these steps:

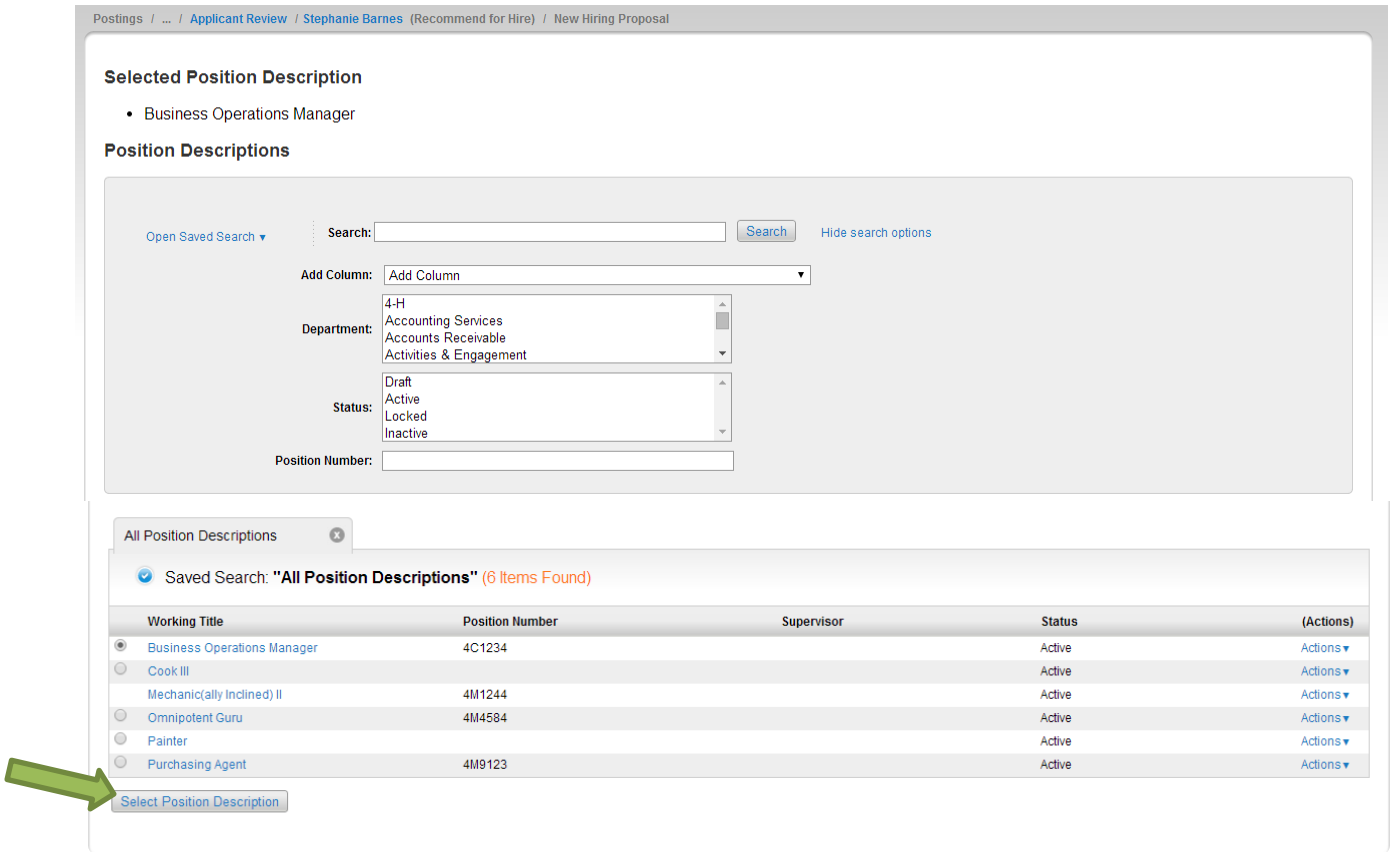


- Click the applicant's name



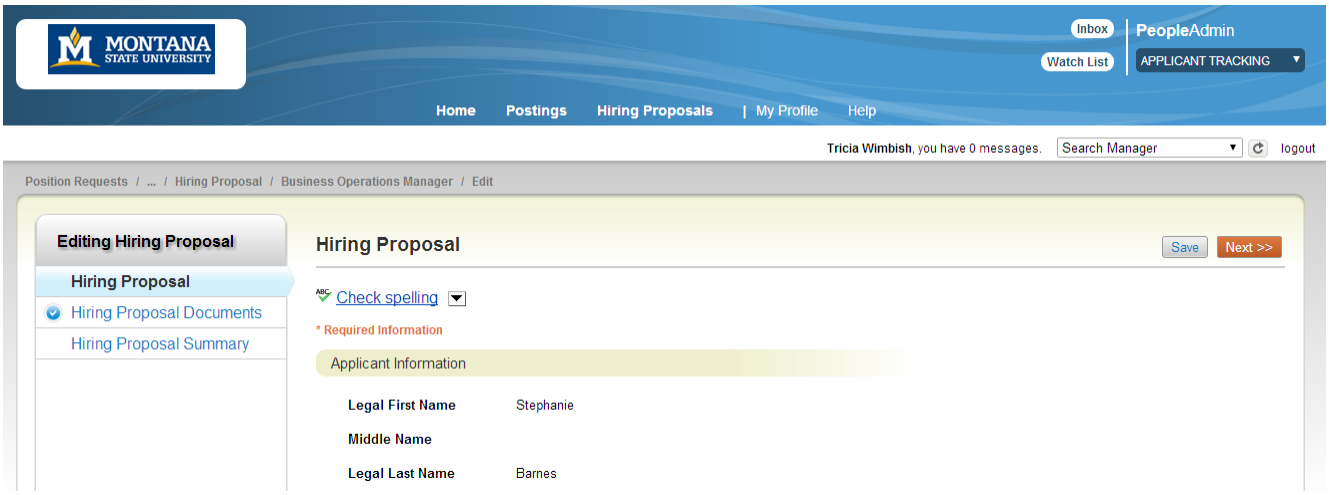
- Click on "Start Hiring Proposal"
- If position has an approved Position Description in position use PD version
- If there is not an approved Position Description use ATS version

Note: The gray menu bar at the top indicates where you are in the system.

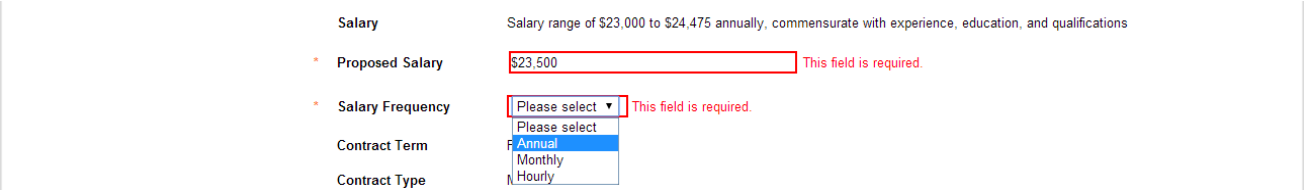


- If correct Position Description was used in the vacancy it will be defaulted at the top
- Click **Select Position Description**
  - If multiple positions in vacancy choose correct Position Number out of the listing, then click **Select Position Description**

- For positions without an approved Position Description
- Select the Start Hiring Proposal from ATS

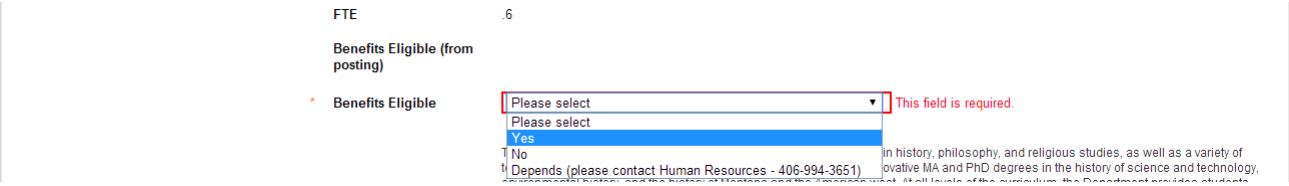


- The Hiring Proposal has been initiated at this point.
- Scroll down to complete the required information under Position Information:



- Enter the proposed salary for the selected candidate
  - ***Note: in the proposed salary, you may enter language indicating the salary is based on a lower than 1.0 FTE (example - $42,000 (based on .8 FTE)***
  - ***Faculty & Professional:*** *If there is a change in salary from what was originally approved and what the candidate negotiated please modify* ***Proposed Salary with Candidate countered with $...***

- Click the drop down arrow for Salary Frequency and select the appropriate option



- Click the drop down arrow for Benefits Eligible and select the appropriate option

Hiring Information

Hiring Proposal Number

* **Search Summary/Hiring Rationale** This field is required.

Please describe the qualifications, experience, skills, abilities and training the final candidate possesses, relevant to the job posting, that led to the committee's hiring recommendation. ***Example: Candidate Name*** *has 5 years administrative experience in a fast-paced customer service environment at Company ABC. Administrative experience included first point of contact as receptionist, answering a 20-line phone, coordinating meeting arrangements for a staff of 20, filing, and miscellaneous administrative type duties. S/He demonstrated excellent computer skills through formatting of the application and the skills test which included an Excel spreadsheet and composing a letter to an irate customer. Customer Service experience was strongly relevant to this position.*

* **Reference Name Called #1** This field is required.

* **Reference Name Called #2** This field is required.

Firm Start Date

Please enter the applicant's date of hire, only when the exact start date is known and agreed upon.

* **Issue Conditional Offer Letter** This field is required.

If "NO" is selected an offer letter will not drafted until background check is complete.

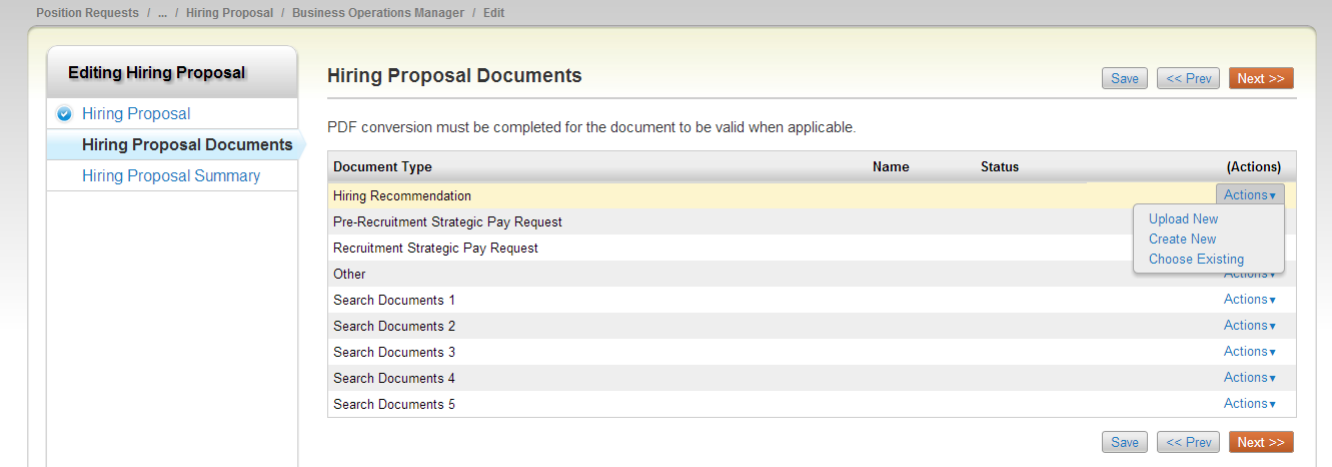
Offer Letter Information

Please enter the name and title of the authorized MSU employee who will sign the offer letter.

- **Search Summary/Hiring Rationale**, enter a summary paragraph of why this applicant was selected
- Enter the names of the references called, notes from the calls will uploaded to next page.
- Enter the Firm Start Date, when known, this will populate offer letter
- Indicate if a conditional letter should be issued or if need to wait until final background check received
- Enter Signer's name and title for offer letter

Save Next >>

- Once the information has been entered, click **Save** or **Next**

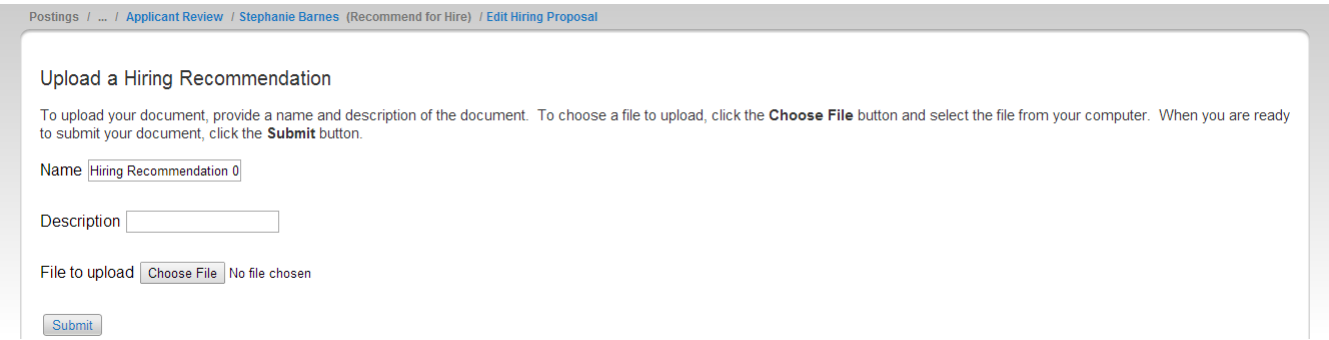


- This provides the ability to attach various documents pertaining to the search. Examples include:
  - Hiring Rationale/Search Summary, if longer summary needed
  - All interview search committee interview notes (applicant's responses to interview questions) ***Notes should be for all candidates not just final candidate. ***
  - Reference check notes
  - Documentation for either a pre-recruitment strategic pay request or a recruitment strategic pay request

- To add documents, there are three options:
  - Upload New
  - Create New
  - Choose Existing
  - Add by URL (Search Documents only)

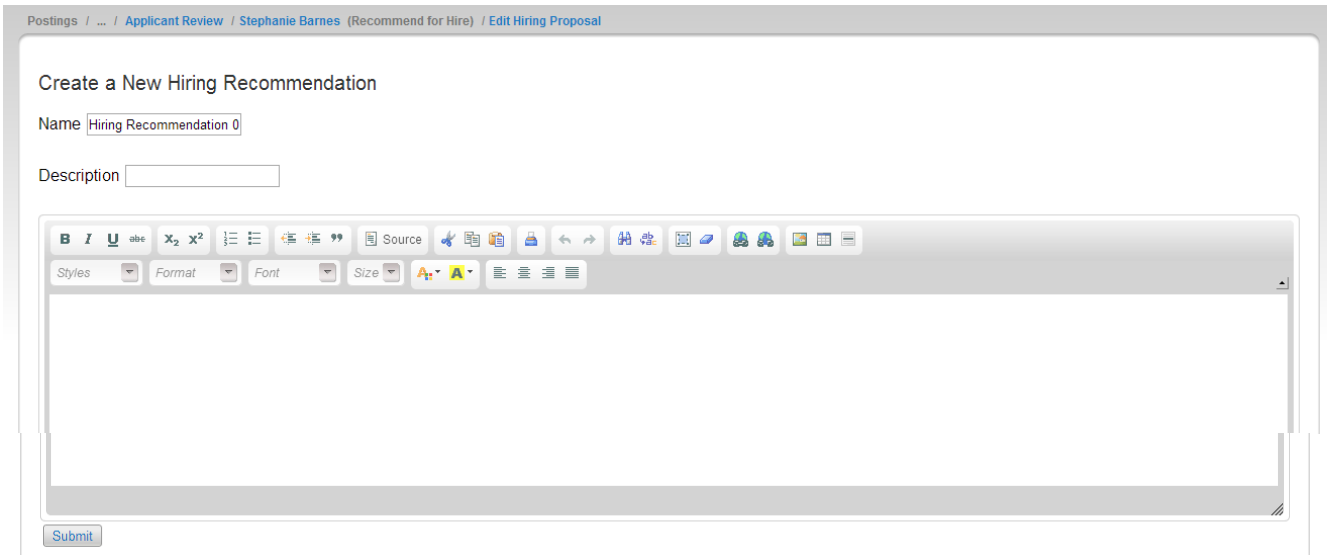
- **All uploads need to be done before sending to Hiring Authority for approval.**

Upload New:



- Description – enter a brief description
- Click on Choose File to upload from your computer
- Click Submit

Create New:

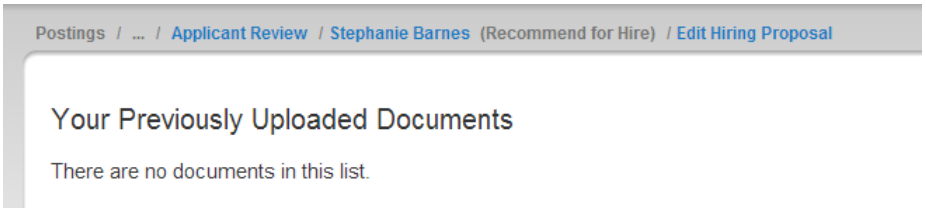


- Description – enter a brief description
- Enter the desired information in the text area
- Click Submit

Choose Exisiting:

- Select an exisiting document to upload by clicking the circle by the document
- Click Submit

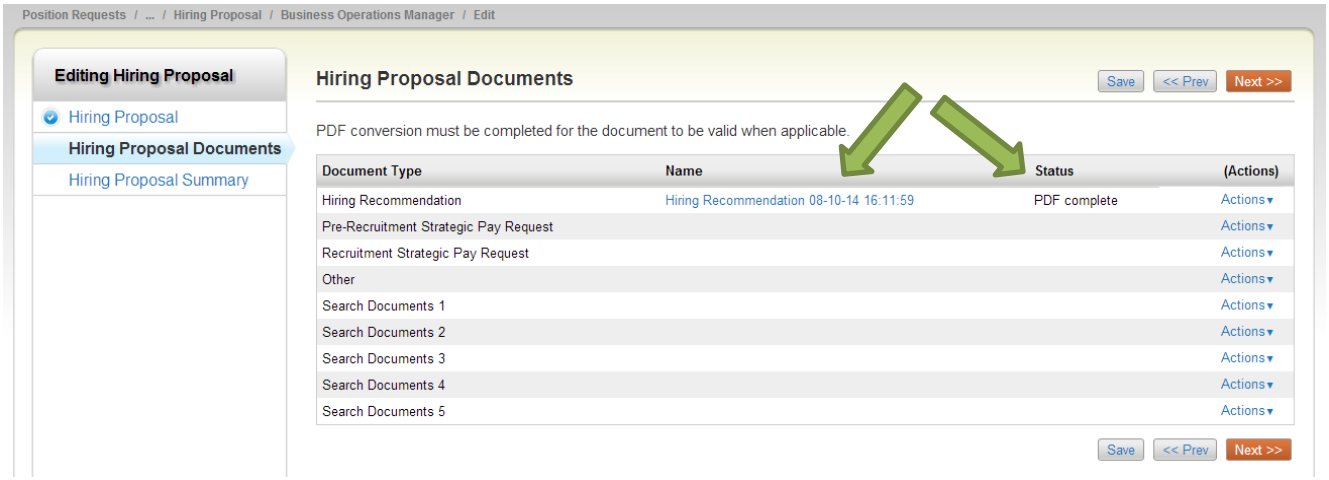
Note: if you have not uploaded any documents, this is the message you will receive:



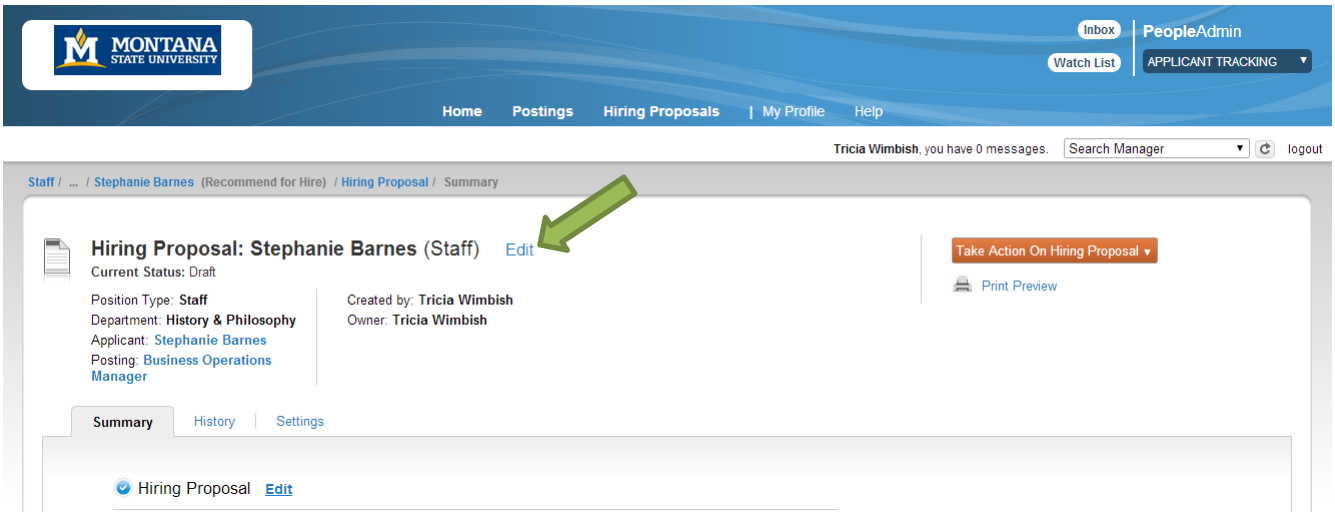
Add by URL:

- Description – enter a brief description
- Enter the URL address
- Click Submit

- Once all of the pertinent documents have been added, the system will indicate what file has been attached and the Status should be "PDF complete".

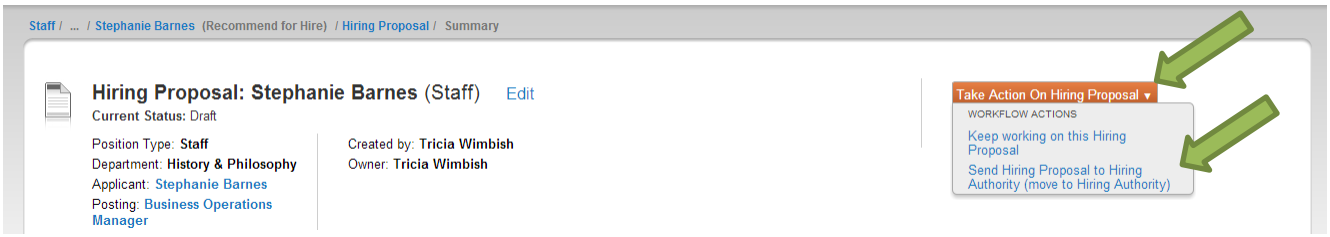


- Click Save or Next



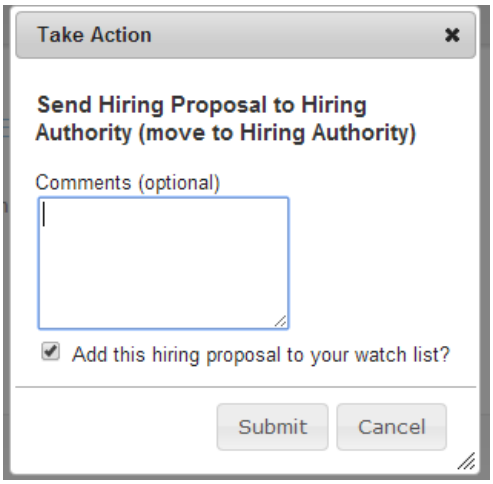
- This is the Hiring Proposal Summary
- Review the summary; click Edit if any changes need to be made before taking action.

- When the summary is correct, click the "Take Action on Hiring Proposal" button

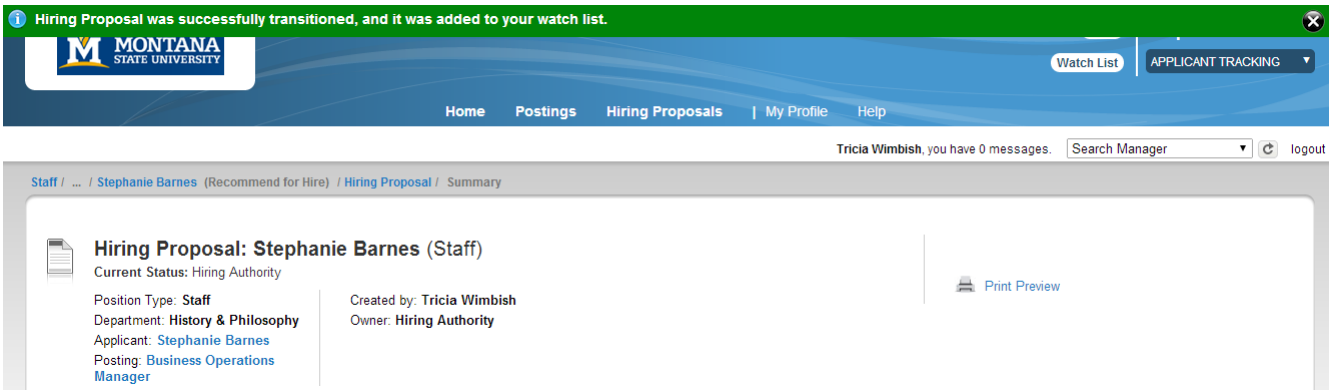


- Select "Send Hiring Proposal to Hiring Authority (move to Hiring Authority)"

Note: once this option is selected, the Hiring Proposal is now owned by the Hiring Authority and cannot be accessed.



- Include any comments for the Hiring Authority
- Click Submit



- The green box indicates the Hiring Proposal was successfully transitioned and added to the Watch List

The Hiring Proposal will go through a workflow similar to below

- Initiated by Search Manager
- Hiring Authority approval
- Human Resources for approval
- Extend Verbal Conditional Offer – Search Manager or Hiring Authority
- Background check (this indicates candidate accepted verbal conditional)
- HR for Offer Letter (after background check, unless department request conditional letter)
- Extend Final Offer – Search Manager or Hiring Authority
- **Terminal State (no editing)** Background Check Failed
- **Terminal State (no editing)** Offer Declined by Applicant
- **Terminal State (no editing)** Accepted by Applicant
- **Terminal State (no editing)** Canceled