

Applicant Tracking System's Training Dean/Vice President/Delegate Guide

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DEAN/VICE PRESIDENT/DELEGATE OVERVIEW

The Applicant Tracking System provides a set of tools for managing and organizing job postings and applicants. It provides oversight into the numerous organizational units in each area, and empowers teams to organize and monitor a large volume of postings and applicants. It allows Deans/Vice Presidents/Delegates an opportunity to manage progress being made in their departments and colleges.

For consistency within MSU, we will use the term **Applicant Tracking System (ATS)** as the name of our new system for recruiting and hiring. The software being implemented is called PageUp. These terms may be used interchangeably; however, all training materials will reference the Applicant Tracking System (ATS).

Deans/Vice Presidents/Delegates can complete the following tasks within the ATS:

- Use Manage Jobs to oversee job postings and their statuses
- Use Manage Applicants to oversee applicants and their statuses
- Perform approvals

APPLICANT TRACKING SYSTEM

Applicant Tracking System Access

- 1. Login to the EBS Portal.
- 2. Select the Enterprise Business Systems link.
- 3. Click on the Applicant Tracking System tile. **Note:** Be sure to 'Allow pop-ups' for the ATS.

Applicant Tracking System Navigation

The Applicant Tracking System dashboard displays a list of bubbles, as well as a Main Menu that can be accessed in the top right corner of the screen. Deans/Vice Presidents/Delegates should use the Main Menu for easiest access to their tasks. The **Manage Jobs** link within the Main Menu will be the most useful task.



Note: If using the bubble dashboard, click on the appropriate link to the right of each bubble to navigate to and complete a task.

Note: If you hold various roles on job postings, you'll have different links for how you get to your jobs.

MANAGE JOBS

How to Find Your Jobs

1. From the *Main Menu*, click on **Manage Jobs**. The *Manage Jobs* screen opens.

	Jobs Manage jobs		
Manage jobs			
Status: Current recruitment Clear	Search		
Types: All •			
Classification Title:			
Show other search criteria			
Posting Classification Title Working Title	Applications MAU Department Subarea HR Analyst Status Opening date Eligibility Ends C	losing date Sourced	
425381 0 Senior Human Resources Professic SAP Business Analy	t 0 Admin Human Resources AP- Professic Karin Root Draft	×	g 🥃 🖪 😫
425431 0 Senior Human Resources Professic	1 Admin Human Resources AP- Professic Karın Root Approve 4 Apr 2017 4 Apr 2017	1	e 🖬 🖻 🖇

- 2. The *Manage Jobs* screen displays all postings within your MAU and the following information:
 - a) Posting number
 - b) Job Title (ex: Research Assistant)
 - i. Click the information button iverse to see a quick view of the job posting. There are additional links here for Notes, Job Preview, Status, HR Analyst details (Owner), Staffing Coordinator details (User) and Applications.

Research Assistant II	
Requisition Number:	492443
Type:	lob
Pos.:	1
Major Administrative Unit / (College:College Of
	Osteopathic Medicine
Status:	Compliance Review
User:	Emma Shreveport
Staffing Coordinator:	Oliver Williams 🖂
Recruitment process:	Faculty Academic Staff
Applications	
Interview not selected- more certifications (1)	qualified candidate selected -
CWilson	

ii. Click the Job Title link to go directly to the Job Card (*i.e.*, position/posting details.)

Position info Notes Docume	nts
Posting Number (EBS Ref. #):	492443 Leave blank to automatically create a reference No.
Link to Position Request Form in SAP:	
	POSITION REQUEST
Classification Title:*	Research Assistant II
	Research Assistance
Working Title/Rank:	Nescaret / Issistant II
Working Title/Rank: EBS Job Number:	NF Research Assistant II



c) Number of Applications – Click the **number** link in the 'Applications' column. The Manage Applications screen opens and displays all applicants for this posting. See <u>Manage</u> <u>Applications</u> in this document for additional information.

Title 🔺	Applications
💷 Research Assistant II	4

- d) MAU (Major Administrative Unit)
- e) Department
- f) Subarea
- g) HR Analyst
- h) Job status
- i) Opening Date: Indicates the date the posting advertisement opens
- j) Eligibility Ends: Indicates the date union bidding eligibility ends (SUPPORT STAFF ONLY)
- k) Closing Date: Indicates the date the posting advertisement closes
- I) Sourced: Green check mark indicates a job is currently advertised and accepting applicants

To the far right of the screen, each job has the following options:

- a) View/Edit the Job Card Click the **Edit** sutton to open the *Job Card*. Use the Job Card to Assign the Selection Committee if applicable. See the <u>View/Edit the Job Card Position Info</u> tab section in this document for additional information.
- b) View/Add Notes Click the **Notes** button to open the *Notes* screen. See the <u>View/Edit the</u> <u>Job Card Notes tab</u> section in this document for additional information.
- c) Preview the Job Click the **Preview** \square button to open the advertised posting text.
- d) View Applications Click the **Applications** ^a button to open the *Manage Applications* screen. See <u>Manage Applications</u> in this document for additional information.

Filter the Manage Jobs Screen

Results can be filtered by selecting criteria from the *Status* and *Types* drop-down menus.

🗥 If you do not clear your search criteria, it will default the next time you visit the page.

 Click Show other search criteria for additional filtering options. Click Search to update results. Note: The Current recruitment status is for all active postings. The Non-current recruitment status is for filled and/or cancelled postings. If you are looking for a position that has been filled, you must search with either the All or Non-current recruitment status.

Status:	Curre	ent recru	itment	٠	Clear	Search
Types'	All					

- 2. Click the Hide other search criteria link to hide the additional filtering options.
- 3. Click **Clear** to remove all filtering.

JOB CARD

View/Edit the Job Card – Position Info Tab

- 1. From the *Manage Jobs* screen, click the **Edit** button. The Job Card (job posting) displays three tabs:
 - Position info
 - Notes
 - Documents
- 2. The *Position info* tab displays job posting information, including:
 - a) Job posting number
 - b) Position details (position summary, details, job duties)
 - c) Search and selection committee information and users
 - d) To Assign a Selection Committee:
 - i. Within the Search/Selection Committee area, click the **Add Search/Selection Committee Member** button. The *Search* screen opens.
 - ii. Search as needed and then click **Add**. The member will be added to the Recipient box below. Repeat as necessary until all members have been added.
 - iii. To remove a member, click **Remove** in the Recipient box.
 - iv. Scroll to the bottom of the page and click the **Save** button to save the Job Card.

Note: See the <u>Staffing Coordinator Guide for Support Staff Positions</u> or the <u>Staffing Coordinator</u> <u>Guide for Faculty & Academic Staff/Executive Management Positions</u> for additional information.

Position info Notes Docum	nents
Posting Number (EBS Ref. #):	492443 Leave blank to automatically create a reference No.
Link to Position Request Form in SAP:	1
	POSITION REQUEST
Classification Title:*	Research Assistant II
Classification Title:* Working Title/Rank:	Research Assistant II
Classification Title:* Working Title/Rank: EBS Job Number:	Research Assistant II NF Research Assistant II

Faculty & Academic Staff Interview Approval Process

Interview list approval will happen at this stage and approval of the interview list by the Chairperson, Dean/VP and the Office for Inclusion and Intercultural Initiatives (I3) is required before beginning interviews. The Faculty & Academic Staff Interview List Approval Form must be completed and uploaded to the *Documents* tab on the *Job Card* once the Chairperson/Department Head and the Dean/Vice President's approval has been completed. Access the form on the HR website at <u>https://www.hr.msu.edu/ua/hiring/documents/Academic_Interview_List_Approval_Form.pdf</u>. For details regarding the Faculty & Academic Staff interview approval process, view the Staffing Coordinator Guide.

View/Edit the Job Card – Notes Tab

The *Notes* tab is used to add a note that is visible by all users in the system.

A Please use discretion as these notes will become part of the permanent hiring record.



- 1. From the *Manage Jobs* screen, click the **Notes** button. The *Notes* screen opens and displays already existing notes.
 - a) To add a note, select **Note** from the *Add* drop-down menu.



b) The Add Note screen opens in a new window.

File: Upload file 💝 Dropbox	-
File:	
File:	
File: Upload file Oropbox	
File: Upload file Oropbox	
File: Upload file IPropbox	
File: Upload file IPropbox	
File: Upload file Oropbox	
File: Upload file 🐨 Dropbox	
File: Upload file IPropbox	
File: Upload file 🐨 Dropbox	
File: Upload file 😵 Dropbox	
File: Upload file 🗘 Dropbox	4
E-mail this note to:	_
E-mail this note to:	
No	
User. A Q	
Other e-mail.	

- c) Enter the necessary information into the Note field.
- d) Add attachments and/or email the note to someone else if necessary.
- e) Click Save. The note (and file, if added) will display on the Notes screen for all users to view.
- f) To edit or delete an existing note, please contact the individual who created the note.

View/Edit the Job Card – Documents and Selection Report

The *Documents* tab contains documents related to the job posting, such as the Salary Justification Letter, Screening Matrix, and Interview Questions. The drop-down menu provides the following options:

- Upload document from a computer
- Download document templates from the ATS Library, such as offer letter templates or Salary Justification Letter templates (for Support Staff only).
- Generate a selection report. All users can generate a search/selection report and/or upload documents, with the exception of search committee members.
 Note: Generate a selection report allows an opportunity to start creating the final selection/search committee report. A report template will prefill with job and applicant information, and additional information may be added as needed. You can generate the Selection Report on any given status. Save the modified version and upload to the *Documents* tab. Alternately, units may upload their existing selection report to the *Documents* tab instead of



generating the selection report. Visit the HR website to see a Sample Selection Report at <u>https://www.hr.msu.edu/aro/documents/Selection-Report-Sample.pdf</u>.

Position Info	Notes	Sourcing	Documents
Select		•	
Select			
Document fro	m a file		
Document fro	m library		
Generate sele	ction renor	+	

To Generate a Selection Report:

- 1. Select **Generate Selection report** from the drop-down menu. The *Generate selection report* screen opens in a new window.
- 2. Select an **Application status** from the drop-down menu. The status selected will display the Search Chair rankings of applicants at that status, if rankings have been provided.
- 3. Choose the appropriate template and click **Okay** to generate the report. Click **Save**.
- 4. Update the template as necessary and save as a new Word document.
- 5. See below to add the updated template to the *Documents* tab to share the final report.

nad	generated report will not be automatically saved le any necessary amendments, upload and attach e a record of the selection panel outcomes.	in the system. Wh the document ag	en you ha ainst this	ive job to
Ap	pplication status : Aeets Basic Qualifications - referred to departmer	nt	Circ	
	Name	Date created	Size	
	Faculty & Academic Staff - Selection Report	31 Oct 2016	126 kb	Viev
۲				

To Upload a File:

- 1. Select **Document from a file** from the drop-down menu. The *Upload a new document* screen opens in a new window.
- 2. Click Upload file and select a file.
- 3. Make a selection from the *Document Category* drop-down menu.
- 4. Enter a Title.
- 5. Click **Save and add another** or **Save and close** or **Close**. The added document(s) will display on the *Document* tab for others to view.

File:*	Upload file	SP Dropbox	
Document category:* Title:	Screening Matrix	<u> </u>	



MANAGE APPLICATIONS

There are a variety of methods to view and manage applicant pools for any job posting:

• From the Job Card, click **View applications** in the left corner of the screen.

View applicati	ons		
Position info	Notes	Documents	

• From the *Manage Jobs* screen, click the **number** listed in the 'Applications' column.

Title 🔝	Applications
I Assistant/Associate Professor	\bigcirc

• From the *Manage Jobs* screen, click the **Applications** (blue person) button.

Sourced	-
×	2 🖬 🖬 名

• From the *Main Menu*, click the **Manage Applications** link.



Once on the *Manage Applications* screen, use the **Search** tab to identify the job posting to be viewed:

1. To view the list of active applicants (or those who have not been disqualified from the process), check the box next to Current application statuses only. This will remove all applicants who are no longer being considered from the position. Click **Search**.

Search	Results			
Job/camp	aign:	Research Assistant II 🛛 🙀 🥥	Cle	ear Sear
		Research Assistant II	Save search:	
Applicatio	on status:	Search Committee Review Search Committee Reviewed Applicant	^	
		Phone/Video/Skype Recommend Applicant Phone/Video/Skype Scheduling		
		Phone/Video/Skype - applicant accepted	•	
E-mail:				

- 2. The **Results** tab displays the selected criteria, along with the following information:
 - a) Job Title



- b) Submitted Date
- c) First and Last Name (click to open the Applicant Card)
- d) Status of each applicant (click to change application status)
- e) Applicant flags

Te Rese	arch A	ssistant	II (4924	43)													
Search	Results																
Select 💽 S	Submitted	First name	Last name	Status	Seniority	Seniority Date	Current Department	Employee group	Candidate type	Personnel sub I	Email	Source	Ret	Dup Employee	Flags 👻		
000 16 J	lan 2017	Chice	Wilson	Interview not selected						1	wilschloox	Board	•			600	View application
000 16 J	lan 2017	6 Gene	Hillsdale	Interview not selected						9	genehillsd	Board	•				View application
000 16 J	lan 2017	O Jacob	Martin	Interview Recommence							martintect	MSU	•	•			View application
000 16 3	lan 2017	© Naomi	Anthony	Interview 1 Completes							naoathon;	Board		(20	600	View application

- f) Additionally, four buttons display at the far right of the screen:
 - i. Click the **View Resume** button to view the resume/CV in a new window. **Note:** CVs may potentially be uploaded as an additional document.
 - ii. Click the **Download Resume** 🗳 button to download and save to your computer.
 - iii. Click the **View Answers** like button to view the application answers in a new window.
 - iv. Click the **View application** link to open the Applicant Card. See <u>Applicant Card</u> in this document for additional information.

Bulk Actions

The *Bulk Action* function makes it easy to perform an action on one or more applicants at once, such as status update, compiling documents, or communication. To perform a bulk action:

 Group applicants, using the colored checkboxes to the left of their names, to help select and categorize applicants all at once. For example, check the green box next to all applicants to schedule for an interview, the yellow box next to all applicants to disqualify due to education, and the red box next to all applicants to disqualify due to experience.

Note: These color categories are temporary and will clear if you navigate away from this page or refresh. Also, the colors have no inherent meaning of their own. They can be used to classify applicants into whatever groups that are needed.

🗆 🗌 🗹 16 Jan 2017	Chloe	Wilson
🗌 🗌 🔽 16 Jan 2017	🕝 Gene	Hillsdale
🛛 🗌 16 Jan 2017	C Jacob	Martin
16 Jan 2017	🗢 Naomi	Anthony

2. Once the appropriate box has been checked for each applicant, use the *Select a bulk action* dropdown menu to select an action.



For more detail about the function of these bulk actions, see below:

Bulk Assign

Used to assign applications to any user in the system for review. This may be used when seeking feedback about an applicant from another user. Assigned users will be sent an email notification and receive a notification in the **Applications** button on their dashboard. The assigned user can review the application with the option to approve or decline the applicant. Approving or declining the applicant has no effect on the applicant status or progress, but is for informational purposes only. The assignee can view the feedback (approved or declined) under history on the Applicant Card. Only one user can be assigned the application at a time. Assigning an application to another user will cancel the previous assignment.

Bulk Communicate

Used for communicating with applicants. Choose from the available templates and edit as necessary, or create your own. This function provides the option to set up delayed emails, but be careful as these cannot be cancelled once scheduled.

• Bulk Compile and Send:

Used to compile documents of selected applicants into a single PDF. Choose what to pull into the PDF by selecting checkboxes next to relevant information. Once the PDF is generated, download it, or email the compiled documents to another user in the system.

Bulk Move

Used to change the application status of multiple applicants all at once.

Note: Send emails to applicants if appropriate, but avoid sending emails to internal users as part of the bulk move action. Otherwise, they will receive an email for every applicant moved into this status. If you would like to send an email to internal users, use **Bulk Move and Send**, as it will eliminate duplicate emails.

• Bulk Move and Send

Used to change the application status of multiple applicants all at once and send application materials to another user in a single email. This bulk action may be beneficial if other users need to be notified of the status change, but should not receive an email for each applicant.

• Bulk Reference Check

Instead of using an application status to trigger reference letter checks, there is the option to bulk reference letter check. This provides the option to select the appropriate reference check form and modify the email that will be sent to the referee accordingly. The ability to modify the email is one benefit of using **Bulk Reference Check** over using application status.

Bulk Send

Used to send application materials to another user as separate attachments. For example, if two applicants are selected and the resume and cover letter are identified as appropriate attachments,

the user will receive four individual attachments. For most purposes, **Bulk Compile and Send** is a much better way to send materials as it compiles all the documents into one attachment.

- 3. Once the bulk action is selected, a new window will open with instructions for that specific task. The system allows action to be taken on applicants starting first with the green category, then yellow, then red. The bar at the top shows which color group you are working with.
 - a) Enter information or choose criteria for the green applicants.
 - b) Enter information or choose criteria for the yellow applicants.
 - c) Enter information or choose criteria for the red applicants.



4. Regroup the applicants as necessary and repeat additional Bulk Actions as needed.

Bulk Compile and Send

From the *Manage Applications* screen, view and download all applicant documents in one PDF using the **Bulk Compile and Send** function.

1. Check the box next to the names of applicants to be included in the PDF.

Page 💽 Submitted	First name 🔻	Last name
🛛 🗌 🖸 23 Jan 2017	O Adrianne	Rakowski
23 Jan 2017	🛛 Aisha	Quayle
23 Jan 2017	Angelic	Claggett
23 Jan 2017	🛛 Angelika	Hulin

Click Bulk Compile and Send from the drop-down.
 Note: Bulk Compile and Send does not send the document automatically, but does provide the option to send via email once generated.



3. Select all documents to include and click Create PDF.



	Applicant documents		
•	Cover letter		
	Offer Contracts		
	Other Application Documents		
•	Reference Letter		
Y.	Resume		
	Recruiter documents		
	Mail matcher document		
	Print options		
	Format for double-sided printing		
		Create PDF	Cancel

- 4. Choose to download the PDF or send to others for review.
- MSU has limitations on attachment sizes. Please be aware, users may have limitations on the size of attachments that may be shared.
 - a) Download the PDF: click the Download document link to open the PDF or right-click on the link to save in a folder.

Bulk action status:	1 Applicant	Complete			
To download Note: To send The documen	he document, righ the document it is t will be sent as an	t click on the link be not necessary to d attachment with th	elow and select 'S ownload the docu e communication	ave Target As'. ment below. below.	
		Your documer Download	nt is ready to dowr document (68.1 k	nload: b)	

5. Send PDF to others for review: Enter information in the email form and edit as needed.

User.				A 2		
	No user se	lected.				
Other e-mail:						
rom:*	ryasharp4	@test.msu.ed	u			
Subject.*						
Body:*						
🛛 🕹 Show m	ierge field in	formation				
Format selection	n∨ B			Tools	~	
Please see a	ttached the	applications t	or:			
Please see a • Naomi	Ittached the	applications t	ior:			

6. Click **Okay** to send the email and return to the *View Applicant* screen.

Applicant Card

- 1. The Applicant Card displays the following information:
 - a) Applicant Profile
 - b) Applications
 - c) History
- 2. Click View references to see reference contact information.
- 3. Under the Applications heading, click **Form** and/or **Resume** to view applicant's answers and resume/CV information.
- 4. Filter History by selecting criteria from the *Item* and *Job* drop-down menus. The filter is automatically applied when selected and the information below is updated.
- 5. Click the **Print** button in the top right corner to print the application.

Naomi Anth	nony		5 🖨 🗌	Actions 🕶
You are viewing	g this applicant's application for the job Rese	arch Assistant II. Only information rel	ated to this application	n will be shown.
Address:	236 Oxford St. East Lansing, Michigan 48823, United States	Phone:	+1 517-323-7000	
E-mail:	naoathony@yahoo.test.edu 🖂	Original source:	Indeed	
Flags: View references Profile	2			
Job mail: 🗙				
Applications	5 Assistant II	Interview 1 Completed	No offer	Actions V
#402443 ES 9	Submitted: 16 Jan 2017 via Indeed	Status changed 16 Jan 2017	no oner	Oo Form Resume
History	v Job: All	4		
Date & time	ltem			
 Friday, 20 Jan Dana Grimm 	n 2017, 12:00am Interview 1 1 Research Assistant II			
Monday, 16 Dana Grimm	Jan 2017, 11:49pm Status changed to 'Inter	view 1 Completed ' by Dana Grimm.		

OFFERS FOR SUPPORT STAFF

Offers awaiting your approval

Prior to sending an offer to the candidate, the MSU HR Analyst must approve the offer. Units have the option to route the offer for additional approvals prior to sending to the HR Analyst. The HR Analyst must be the final approver. The Dean/Vice President/Delegate may be assigned by the Staffing Coordinator to approve an offer. Additionally on Support Staff positions, the final approver must be the HR Analyst.

- 1. From the *Main Menu*, click on **Offers**.
 - OR

From the dashboard, click the link offers awaiting your approval link.



2. The *Manage offer approvals* screen opens and displays offers waiting for approval.

Manage offer a	Manage offer approvals					
The following offers either approve or d	s have been assigned to you for a ecline the offer.	pproval. Click view to review the offer	details, and then			
Offer created 🔝	Applicant name	Originator name				
18 Jan 2017	Kenneth Khol	Dana Grimm	View			

- 3. Click View. The Offer Card opens in a new window.
- 4. The Offer Card displays the following information:
 - a) Applicant Profile

- Perso	Personal details				
Address:	51 Sunchase Blvd. Okemos, Michigan 48864, United States	Phone: 517-353-8633			
E-mail:	martintech@msu.test.edu				
🔁 View p	profile				

b) Job details

 Job details 	
Posting Number (EBS Ref. #):	492442
Classification Title:	Countant I.
Major Administrative Unit / College:	Residential & Hospitality Services, Div
Primary Department:	Residence Education And Housing Ser Admn 10078943

c) Hiring Recommendation

i. Approval Information

 Hiring Recomme 	ndation		
Approval status:	Pending		

ii. Position Details

POSITION DETAILS	
Personnel Subarea:*	AP- Professionals
Pay Grade Level:	11
Employee group:	Union
Employee sub-group:	Salary Level 2
Work Schedule:*	STANDSAL V
Employment %:*	100
Hours per week:*	40
Start date:*	31 Jan 2017
	To ensure a successful Criminal Background Check (CBC), start date should be no sooner than 14 days from when an offer of employment is accepted.

- iii. Salary Information
- iv. Pre-Employment Checks
- v. Onboarding Information
- d) Offer documents
- e) Approval process
- 5. After all information has been reviewed:
 - a) Click **Approve** to approve the Offer and return to the *Manage offer approvals* screen.
 - b) Click **Decline** to disapprove the Offer and enter the reason for declining and click **Save**.

REPORTING

Reports are contained in one central location in the ATS, making it easy to access information about multiple postings at once. You can run the following reports for all active postings within your MAU:

- Applicant List
- Faculty & Academic Staff EEO Summary
- Support Staff EEO Summary

For further details on using reporting in the ATS, view the Reporting Guide on the HR website at <u>https://hr.msu.edu/aro/documents/reporting-guide.pdf</u>.