# MICHIGAN STATE
## U N I V E R S I T Y

# Applicant Tracking System's Training
## Search Chair/Committee Member Guide

**Updated 10/1/2018**

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## SEARCH CHAIR/COMMITTEE MEMBER OVERVIEW

'Your Role' may be Search Chair on some postings and Committee Member on other postings.

Search Committee Members can complete the following tasks within Applicant Tracking System:
- View job information
- View application materials
- Submit candidate ratings
- Approve offers if assigned

The Search Chair can perform the same tasks as the Committee Member; as well as the Search having additional capabilities, including the ability to:
- View all search committee ratings
- Rank candidates in order of preference
- Generate selection/search committee report

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 ATS.

### 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 TS.

### Applicant Tracking System Navigation
The *Applicant Tracking System dashboard* displays information links for the Search Chair/Committee Member.  Click on the appropriate link to navigate to and complete a task.

The *Main Menu* can also be used to navigate to the appropriate task and can be accessed at any time for easy navigation between tasks.

## SEARCH COMMITTEE REVIEW
### Search Committee Review
1. From the *dashboard*, click the link **jobs requiring search committee review**.
   *OR*
   From the *Main Menu*, click on **Search Committee Review**.

2. The *My Search Committee Jobs* table displays all assigned job postings and the following information:
   a) Posting number
   b) Job status
   c) Department
   d) Your Role (may vary depending on your committee duties)

i. Search Committee Members have the option to **View Applicants** and **View Job**.
ii. Search Chairs have the option to **View Applicants**, **View Responses** and **Edit Job**.
**Note:**
- Edit Job allows access to the job posting and to run a search committee report. The ability to edit the job is not applicable.
- For further information on these topics, click on the link above.

## View Applicants

1. From the *My Search Committee Jobs* table, click the **View Applicants** link. The *View Applicants* screen displays the Job Title, Posting Number and Your Role.
2. The table of applicants is displayed below.
   a) Applicants are grouped by application status. As applicants progress through the process, Search Chairs should communicate with the Staffing Coordinator to update the application status. Staffing Coordinators will have the option to send the applicant system-generated notifications as their statuses are updated. Applicants will be able to monitor their status via the Applicant Portal.

3. View applicant documents individually by clicking on the **View Resume** or **View Answers** button next to the applicant's name.
   **Note:** Both screens will open in another window, allowing multiple resumes and/or multiple application answers to be viewed at the same time.
   **Note:** Within the View Answers window, there are individual links to applicant documents.

4. Compile documents of multiple applicants into a single PDF using **Bulk Compile and Send**.
   a) Check the box next to the name of all applicants to include in the PDF. Click the **Bulk Compile and Send** button.

   b) Select all documents to include and click **Create PDF**.

   c) Choose to download the PDF or send to others for review.
      i. Download the PDF: click the **Download Document** link to open the PDF or right-click on the link to save in a folder.

      ii. Send PDF to others for review: Enter information in the email form and edit as needed. Click **Okay** to send the email and return to the *View Applicant* screen.

5. **Optional:** Select an outcome for each applicant using the *Outcome* drop-down menu. The outcome is the opinion/recommendation of the user selecting the outcome. An outcome can be selected multiple times for an applicant at different points in the process; i.e. after a phone screen has been completed, after the interview has been completed, etc.
   **Note:** This outcome is NOT anonymous. It will be displayed to the Search Chair, MSU HR, and the Primary Staffing Coordinator.

6. **Optional:** Select a Rank (Search Chair ONLY task) for each applicant using the *Rank* drop-down menu. The rank is based on the total number of applicants on the list. For example, if there are five applicants in the list, there will be five rankings available to choose from. Ranking all applicants is not required.

7. Click **Save and Next** or **Save and Previous** to make selections for other applicants.
   **Note:** Once Outcome and Rank have been selected and saved, the status of the review displays next to the applicant's name.

## View Responses (Search Chair task ONLY)

View Responses are used to help make a determination on how to rank the applicants.
1. From the *My Search Committee* Jobs table, click the **View Responses** link. The *View Responses* screen displays.
   **Note:** Search Committee Members outcomes will be displayed under each applicant's name. There is not an option for Search Committee Members to enter comments at this time. The comments field will appear as "No response."
2. Click on the applicant's name to view an Outcome from other Search Committee Members.
3. To view Outcomes for a specific status in the process, select a status from the *Feedback from search committee members* drop-down menu.

## Job Card/Posting Details

Search Committee Members have an option to **View Job**. Search Chairs have an option to generate search/selection reports, add documents and notes through the **Edit Job** link. Search Committee Members will only be able to view these options.
1. From the *My Search Committee Job* screen, click the **View/Edit Job** link. The Job Card displays three tabs at the top:
   a) Position Info
   b) Notes
   c) Documents
2. The *Position info* tab displays job posting information for viewing purposes only:
   a) Job posting number
   b) Position details (position summary, details, job duties)
   c) Search and selection committee information and users

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

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

   a) To add a note, select **Note** from the *Add* drop-down menu. The *Add Note* screen opens in a new window.
   b) Enter the necessary information into the Note field.
   c) Add attachments and/or email the note to someone else if necessary.
   d) Click **Save**. The note (and file, if added) will display on the *Notes* tab for all users to view.
   e) To edit or delete an existing note, please contact an MSU HR Analyst for assistance.

4. The *Documents* tab contains documents relating to this job posting, such as:

   - Salary Justification Letter
   - Screening Matrix
   - Interview Questions

Using the drop-down menu, you can upload documents from your own computer or download document templates from the ATS Library, such as offer letter templates or Salary Justification Letter templates. Additionally, you can generate a selection report by the link in the drop-down menu. The Search Chair can generate a search/selection report and/or upload documents.

## How to generate a selection report

**Generate a selection report** allows an opportunity to start creating the final search committee report. A report template will prefill with job and applicant information. Add additional information as needed. Save the modified version and upload to the *Documents* tab.

1. Select **Generate Selection report** from the drop-down menu.
2. The G*enerate selection report* screen opens in a new window.
   a) Select an **Application status** from the drop-down menu which will show the ranking of that status.
   b) Choose a selection report template and click **Okay**. Select save.
   c) Update the template as necessary and save as a new Word document.
   d) See step 2 to add the updated template to the *Documents* tab to share the final report.
   e) Select **Document from a file** from the drop-down menu. The *Upload a new document* screen opens in a new window.

## How to upload a document

1. Select **Document from a file** from the drop-down menu.
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.

## INTERVIEWS

If the Search Chair and Committee Members have been assigned as participants on an interview event by the Staffing Coordinator, the Search Committee can access the event information through the link on the *dashboard* or from the *Main Menu*. This enables participants to review their scheduled Interview event information and add to their calendar.

⚠ For Faculty & Academic Staff positions, appropriate approvals must be obtained from department heads, deans and the Office for Inclusion and Intercultural Initiatives (I3) prior to scheduling 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
https://www.hr.msu.edu/ua/hiring/documents/Academic_Interview_List_Approval_Form.pdf.

For specific details regarding the Faculty & Academic Staff interview approval process, view the Staffing Coordinator Guide.

### Interview Information

1. From the *dashboard*, click the **scheduled interviews** link
   *OR*
   From the *Main Menu*, click on **Interviews**.
2. The *My events* screen opens and displays the details of the event:
   a) Date and time
   b) Event Title
   c) Venue
   d) Event Type
   e) Applicants

### Add Interview to Calendar

1. Click the **Add to my calendar** link under the interview event information to add it to your Outlook calendar.
   **Note:** For automatic calendar scheduling integration, users must be on MSU's CampusAD. Please discuss with departmental IT staff to determine if applicable per department.
2. Once selected, Outlook will open with the new appointment reflecting the interview event information. You can add additional notes, invite additional attendees, forward, etc.

## 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 Search Chair/Committee Member may be assigned by the Staffing Coordinator to approve an offer.

1. From the dashboard, click the link offers awaiting your approval
   *OR*
   From the *Main Menu* ☰, click on **Offers**.
2. The *Manage offer approvals* screen opens and displays offers waiting for approval.

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3. Click **View**. The *Offer Card* opens in a new window.
4. The Offer Card displays the following information:
   a) Applicant/Personal details
   b) Job details
   c) Hiring Recommendation
      i. Approval Information
      ii. Position Details
      iii. Salary Information
      iv. Pre-Employment Checks
      v. Onboarding Information
   d) Offer documents
   e) Approval process
5. After all information has been reviewed, determine next steps:
   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. Your permission group and Job Card role will determine the reports you can view for a particular posting.

The Search Chair listed on the Job Card can run the following report for that posting when it is active:
- Search Committee Ratings

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