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ADMINISTRATOR'S GUIDE
For Staff Postings

Western Michigan University's
Online Applicant Tracking System

Created 02/28/2022
Revised 11/28/2022

INTRODUCTION

Welcome to the Western Michigan University's Online Applicant Tracking System (OATS). This recruitment system was established to maintain our online applicant tracking system for processing job postings and accepting applications for employment. PeopleAdmin is our vendor for our online applicant tracking recruitment system.

This system will be used to:

- Create and submit position postings
- View applicants from your posting and select finalists
- Close communication loop with remaining applicants within the posting

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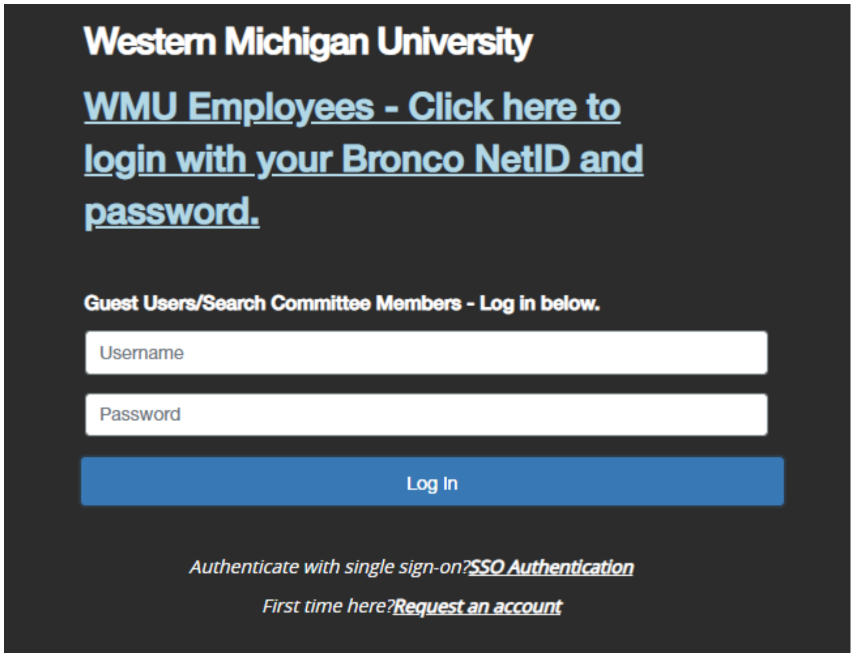
Create Job Posting (Human Resources):

Access the PeopleAdmin site by going to: www.wmujobs.org/hr

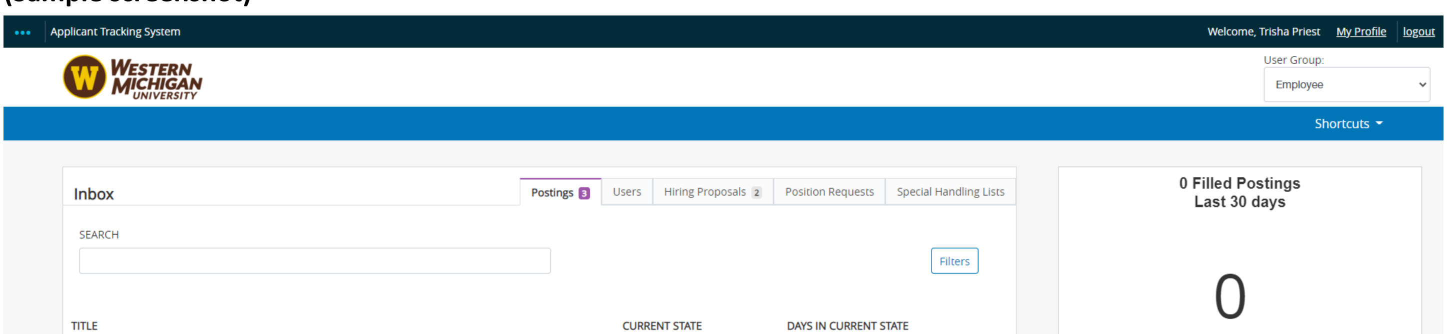
(Sample screenshot of the page below)



As an HR user, please click the light BLUE hyperlink ABOVE the Guest User area, which will direct you to the WMU single sign-on page to enter your Bronco NetID and password.

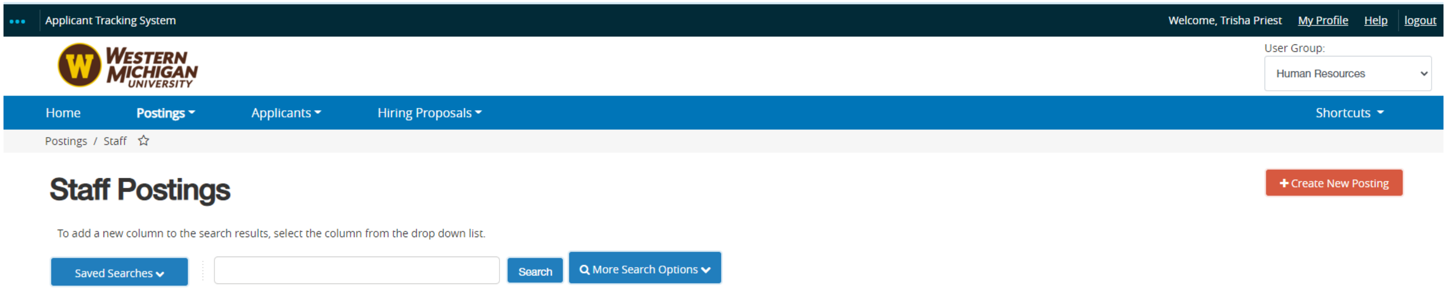
You will now be logged on to our Online Applicant Tracking System.

(Sample screenshot)



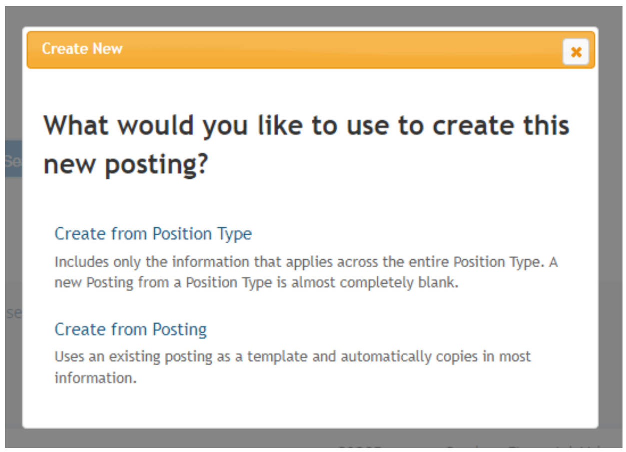
To create a new job posting:

1. Ensure your user group in the upper right-hand corner of the screen is set to "Human Resources" for staff postings. If it is not set, click the drop-down arrow to change appropriately.
2. In the blue bar on the top of the page, select Postings/Staff.
3. Once in site, click orange +Create New Posting button on top right side of screen. **(Sample screenshot of the page below)**



You will need to decide how you would like to **create your new posting**. You will pick from the following:

- Create from Position Type (new position never posted before).
- Create from Posting (search by browsing postings previously posted).



If you select "**Create from Position Type**" you will now type in Job Title and complete the Organizational Unit section. Ensure the box is checked to "accept online applications". Select which type of application forms will be accepted (see note below). Additionally, ensure "allow supporting documents to be uploaded to applications" is checked. Click orange "**Create New Posting**" box.

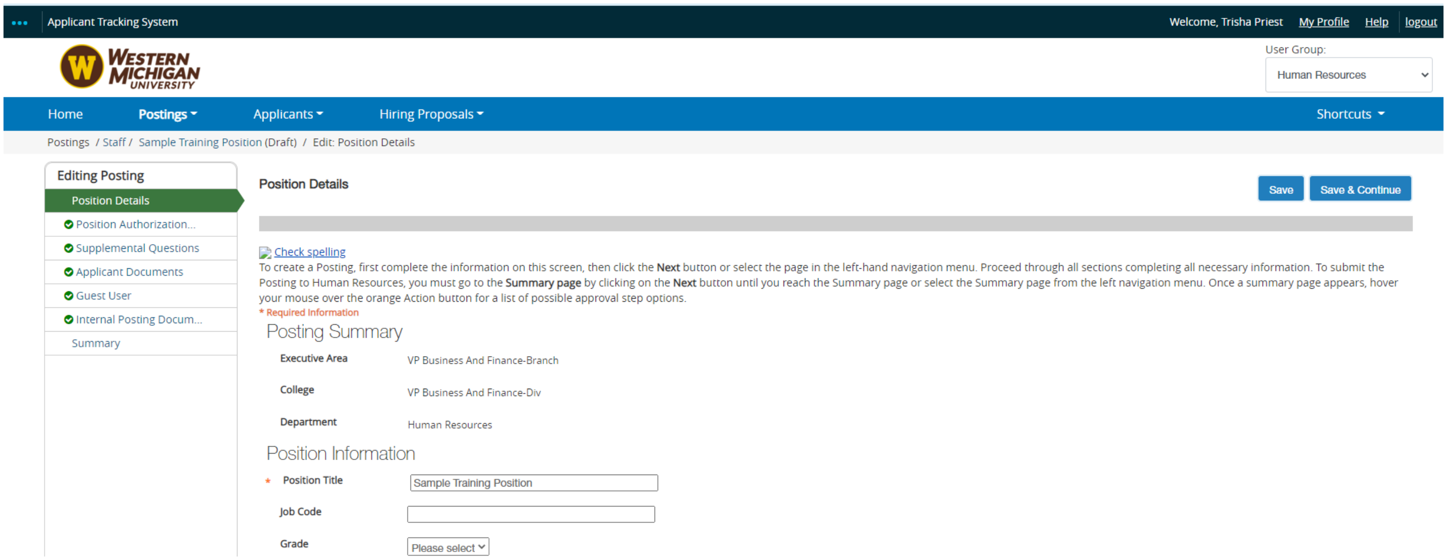
Types of WMU Applications:

- WMU – Application – this is used for all external applicants (formerly the Staff Employment Application).
- WMU – Internal – this is used for all internal applicants (formerly the Job Opportunity Transfer Application).
- WMU – AFSCME – this is used for all ASFCME positions.

If you are pulling from a position previously posted, select "**Create Posting from this Posting**". You will be prompted to identify a previous posting to use. You may enter the position title, or previous posting number, in the search box to easily navigate to a prior posting. If a position is identified for use, click the red "action" listed in the position row, then chose "**Create Form**". A new posting screen will appear with the posting information pre-populated. Review information and make necessary changes. When complete, click "**Create New Posting**".

Position Details:

To create a posting, first complete the information on the screen, then click the "Save & Continue**"** button or select the page in the left-hand navigation menu. Proceed through all sections completing all necessary information. This can be saved at any time as a draft to work on later. As long as it is in draft mode you will be able to make changes. To finalize the posting, you must click on the "**Save & Continue"** button until you reach the summary page or select "**Summary"** from the left navigation menu. Once a summary page appears and you have reviewed the posting, hover your mouse over the orange "**Take Action On Posting"** button for a list of possible approval step options. The posting must go through the proper approval chain until it is returned to HR. HR will review/approve the final draft and will post the position on the website.



Supplemental Questions:

- To add a New Posting Question: Select the orange "**Add a question"** button. You may type in a keyword or search by category. If you cannot find a question, you may click "**Add a new one**" on the bottom right side of the "Add a Question" box. Once a question is identified, click to check the "**Add**" box on the left-hand side of the question. Click "**Submit**".
- You can add an existing question.
- To create Disqualifying Responses: Click on the question that has been added. A dropdown menu will appear where points and disqualifying responses can be associated to the posting question. Select the appropriate "Disqualifying" box.
- Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

(Sample screenshot on next page)

Position	Required	Category	Question	Status
1	☐	Education	Do you have a bachelor's degree?	active

Possible Answers: Predefined Options

	Answer	Points	Disqualifying
1.	Yes		☐
2.	No		☐

Applicant Documents:

Applicant documents can be included in the application process by selecting either optional or required. If" Required" is selected, the applicant will not be able to complete the application process unless the document(s) are included. All applicants will be, required to submit the following documents: Resume, Cover Letter, and List of References. The common optional document would be "other".

(Sample screenshot below)

Applicant Documents

Select the documents to be required with this item, and those that may optionally be attached. Document types marked "Not Used" cannot be attached to this item.

Order	Name	Not Used	Optional	Required
1	Resume	○	○	●
2	Cover Letter	○	○	●
3	Transcripts	●	○	○
4	Letter of Recommendation	●	○	○
5	Curriculum Vitae	●	○	○
6	Media File	●	○	○
7	Portfolio	●	○	○
8	List of References	○	○	●
9	Other	○	●	○

Guest User:

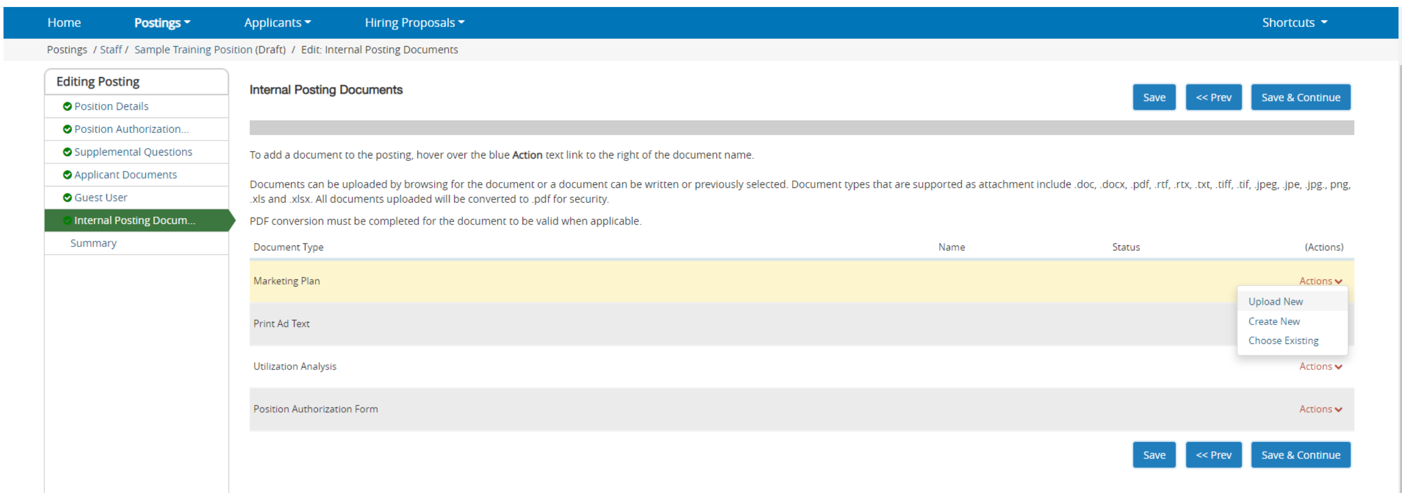
A guest user login can be created for search committee members.

- Click "**Guest User**" to establish the login criteria for the posting.
- A username will automatically be assigned. Update the password to – Staffxxxx – where the x's represent the 4-digit position number. Click "**Update Password**" and "Save" when finished.
- Departments may also send this information directly to their guest users via the applicant tracking system by adding individual email addresses of guest users. The guest users will receive the username, password and link to access the posting from an automatically generated email once the position is posted.

Internal Posting Documents:

To add a document to the posting, hover over the red "**Actions"** link to the right of the document name and select "**Upload New**". This will allow for you to upload the current document for each type. You will be able to upload new documents at any time in the future.

Below is a screen shot of Documents that can be added:

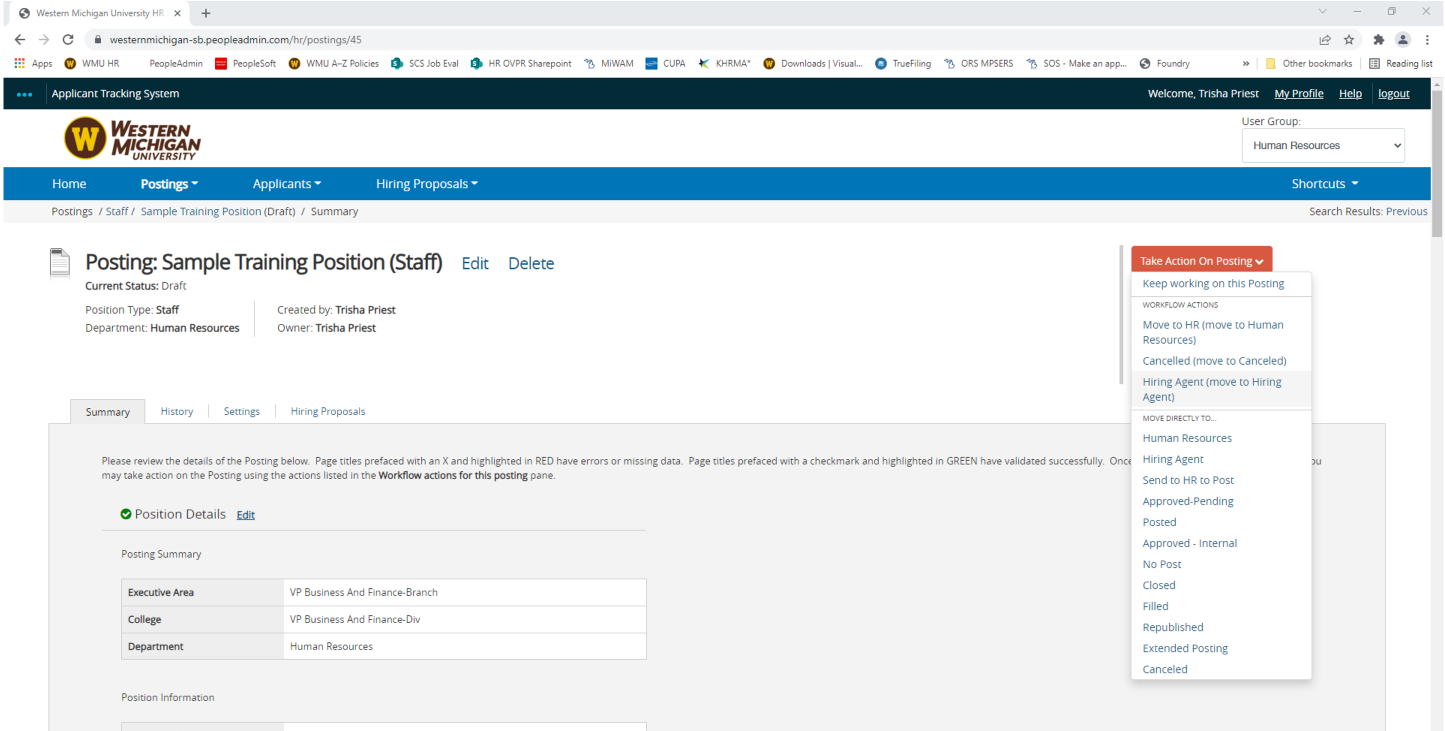


Click on the "<u>**Save & Continue"**</u> button. A summary of the posting will appear. <u>Please review the details of the posting carefully before continuing</u>. Each section must have a green check mark before you will be able to proceed. If there is a red exclamation point , you will need to click "edit" next to the section and correct the errors.

It might be helpful to click on the "<u>**See how Posting looks to Applicant"**</u> button. This is what the applicant will see when searching for positions.

Posting Draft Completed (Submit to Hiring Agent for Review/Approval):

Now you will click on the orange "**Take Action on Posting"** button. Select **Hiring Agent (move to Hiring Agent)** to allow for the hiring agent to review the posting. **(Sample screenshot below)**



Review and Approve Job Posting (Hiring Agent):

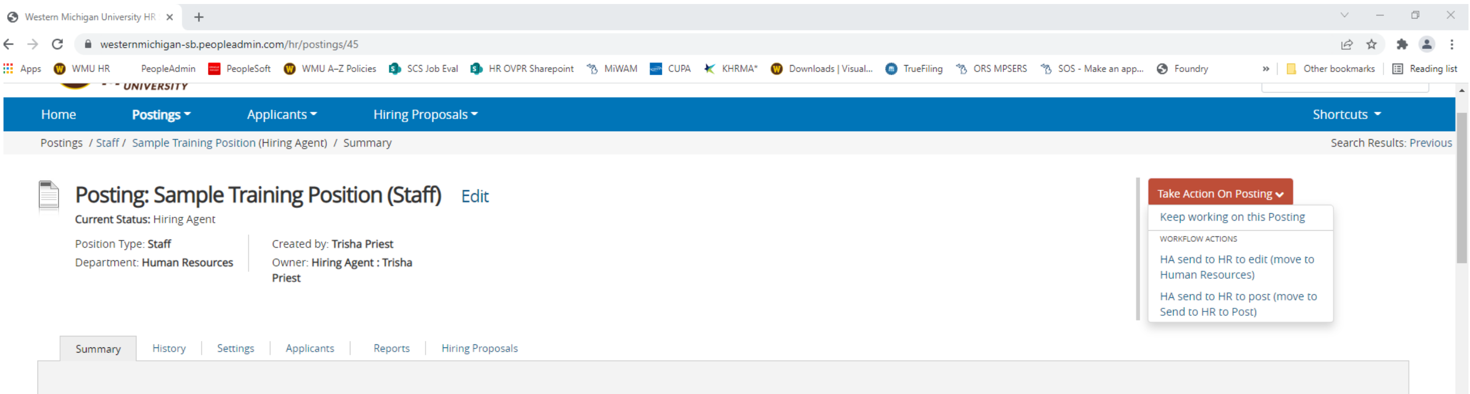
The Hiring Agent will receive an email notification of a job posting that is available for review. The Hiring Agent will either be able to propose changes to the posting back to HR, or submit the posting to HR to post. When the posting has been approved by the Hiring Agent, HR will approve and post to website.

The Hiring Agent logs into the system via the admin portal: www.wmujobs.org/hr.
At the top right of the screen, ensure the user group is set to "**Hiring Agent"**. The draft posting may be found: on the main page in the **Inbox** portion of the website, under "My Jobs" within the "**In Progress"** section, or, the hiring agent may select "**Postings"**, then "**Staff"** to search for the specific posting. Click the title of the posting to open the posting details.

The posting will appear on the screen on the summary tab of the posting. The hiring agent may review the posting here. The hiring agent may also update the desired qualifications for a position.

- If changes are necessary, the hiring agent will need to communicate these changes to HR by clicking the orange "**Take Action on Posting"** button and click "**HA send to HR to edit (move to Human Resources)".** This action will prompt a box to open allowing the hiring agent to add additional comments to HR. HR will make changes and forward the posting back to the hiring agent for another review before posting.

If no other changes are necessary, the hiring agent will click on the orange “**Take Action on Posting”** button and click “**HA send to HR to post (move to send to HR to Post)”.** This action will prompt a box to open allowing for the hiring agent to add additional comments to HR. HR will receive notification of the status change. Based on conversations with the department, HR will finalize the posting and post per the department’s request.



Posting the Job (Human Resources):

HR will review the posting one last time before starting the final posting process. When ready, HR will access the posting via the draft posting. On the summary tab, next to the bolded position title, click “**Edit**”. In position details, scroll down to the section noting the posting dates and populate the appropriate dates as needed per the specific posting process. **(Sample screenshot below).** Click **“Save”.**

Click “**Summary**” on the left-hand navigator, then the orange “**Take Action on Posting**” button and select the proper posting method:

- Posted – this will post the position live, either internally, externally, or simultaneously, based on dates provided.

- Internal – this will post the position live, as internal only; only benefits-eligible employees may apply.
- No Post – this will activate the Quick Link for the applicant to apply to the No-Post position. No-posts must be pre-approved by Institutional Equity before posting.

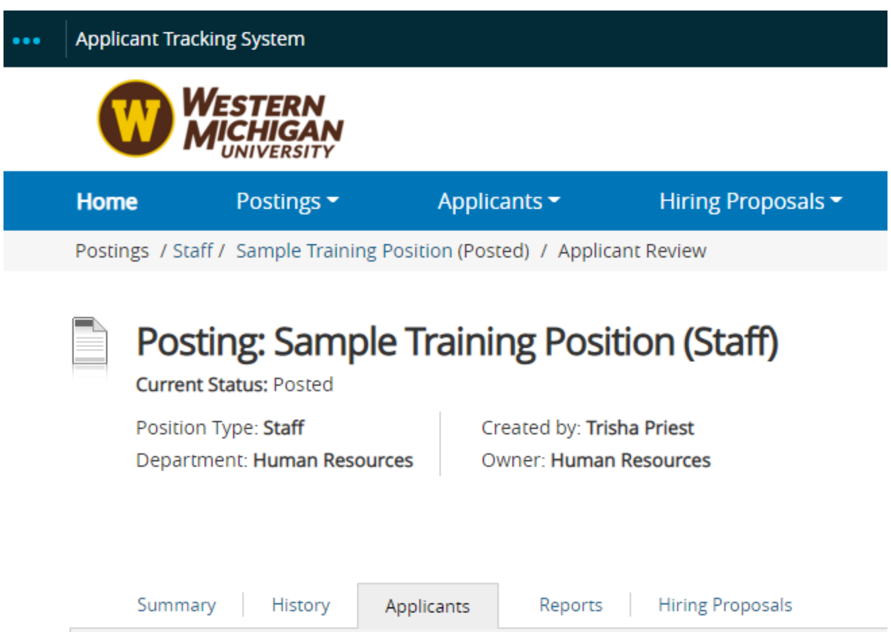
The posting will now be set up to receive applications.

Reviewing Applications (Hiring Agents):

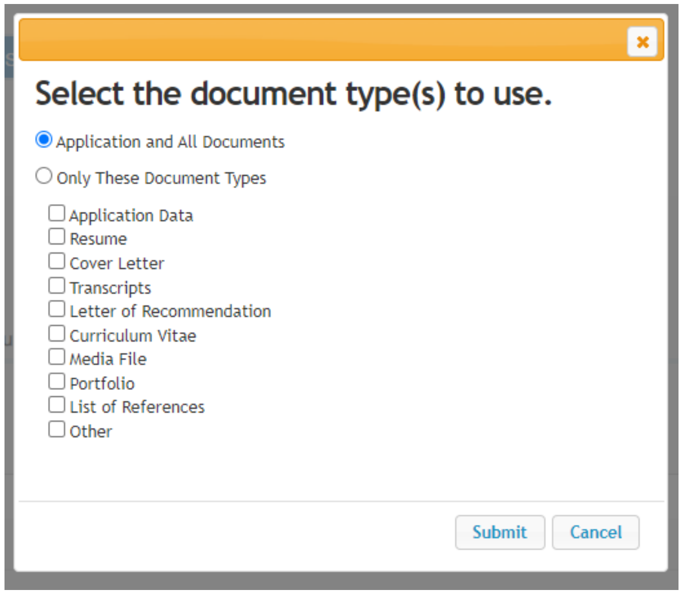
Hiring Agents will have access to the application documents of applicants in their posting pools. As a reminder, guest user access will need to be provided in order for committee members to access applicant information.

View application documents of applicants:

- Log into the applicant tracking system via the admin portal: www.wmujobs.org/hr.
- Ensure the appropriate user group in the upper right-hand corner is set to: "**Hiring Agent**".
- Click "**Postings**" in the blue bar and then select "**Staff**".
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the summary tab on your posting. Click "**Applicants**" tab. You now will be able to view all the applicants that have applied by clicking on their names. (See screenshot below).



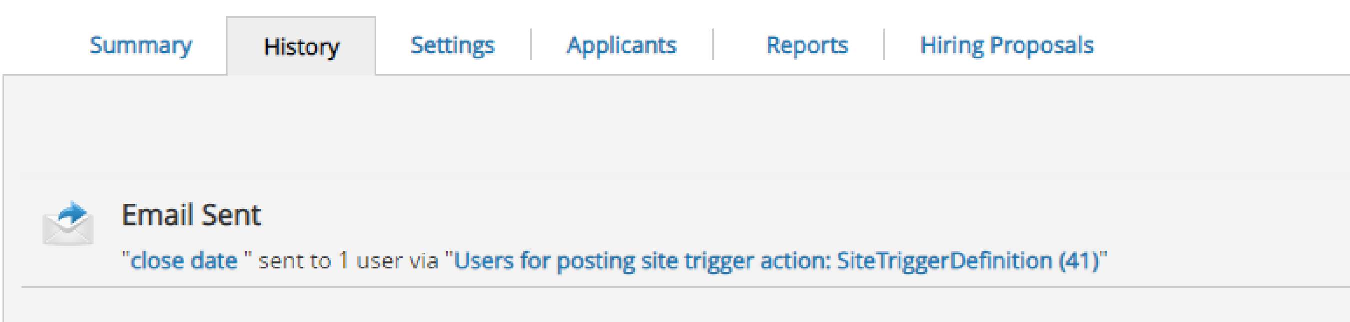
- To view more than one applicant at a time, put a check by their names or a check at the top of list by "Applicant Last Name" to show all. Click on the orange "**Actions**" button on the right side and click "**Download Applications as PDF**". This will let you view the applicant(s) application and attached requested materials. You can also print this list. **(Sample below)**



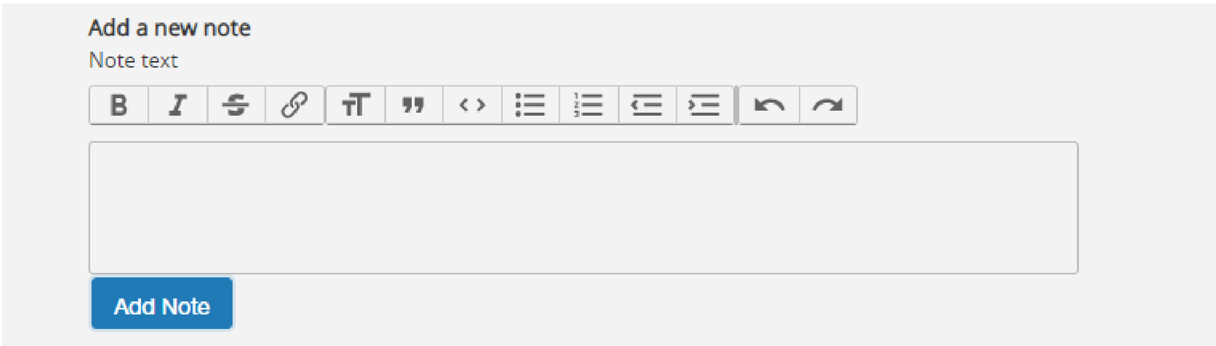
Manage Applicant Pool:

This step allows hiring agents to manage the applicant pool while processing applicants in the system. You will need to make sure your User Group (upper right-hand side) is set at "Hiring Agent" for this to work. The applicants will be moved to a list that can be viewed at any time by doing a search function. You can dispense each applicant by clicking on the Orange "**Take Action on Job Application**" button.

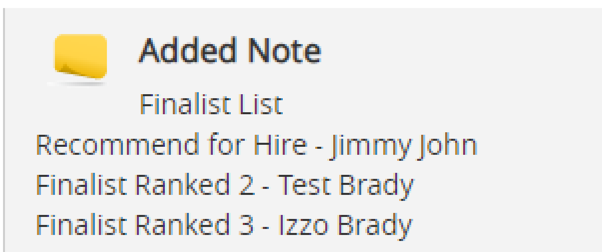
- Not Interview/Not Hired – This applies to all applicants whom do not meet the department's screening requirements (e.g. relevant experience). This will remove them from your active applicant pool and place them in the not interview/not hired category.
- Interviewed/Not Hired – this applies to all applicants interviewed; however, they were not ranked as a finalist for a position.
- Send Staff PAR to OIE for Approval – if you wish to send applicants to OIE as finalists,
    1. Click the" History" tab,



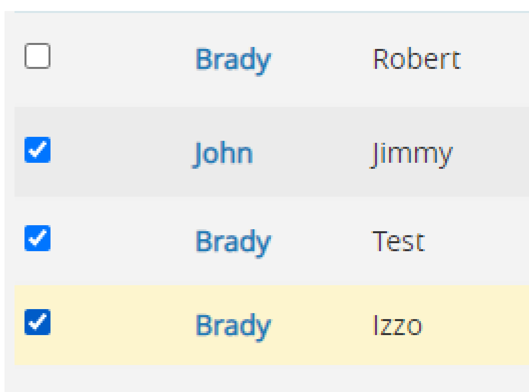
2. Scroll to the bottom of the page and add a new note to this posting.



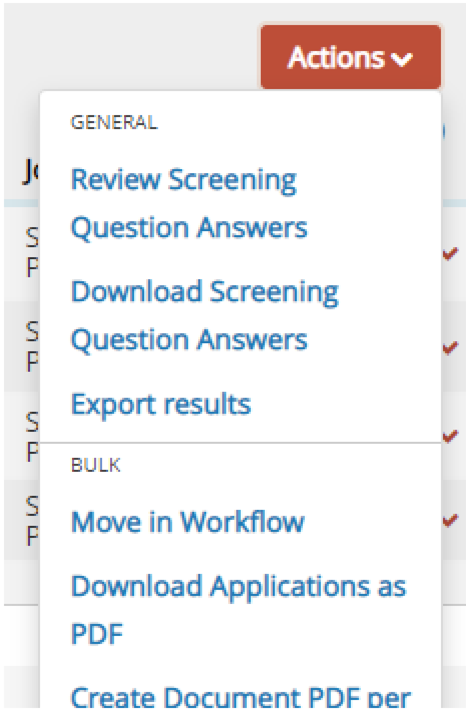
3. Follow this formatting:



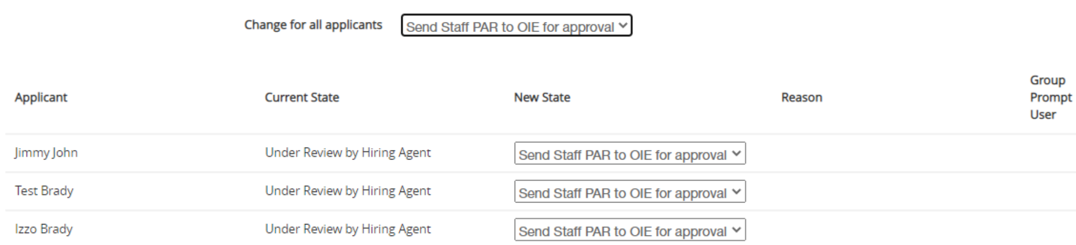
4. Go back to "**Applicant**" tab and check the boxes of those applicants that are finalist



5. Once checked, go to the orange “**Actions**” button and choose “**Move in Workflow**”



6. Choose the drop down next to the “**Change for all Applicants**” and chose “**Send Staff PAR to OIE for approval**”



7. Click “**Save Changes**”.

Please note: If specific applicants are not considered finalists and are not sent to IE, the hiring agent will need to dispense all “remaining” applicants either as Not Interviewed/Not Hired or Interviewed/Not Hired. When HR updates the posting to Filled after a hire is made, the system will notify the candidates not selected by email that the position has been filled.

Staff PAR Review (Institutional Equity):

1. Ensure User Group is set to OIE.
2. Select “**Postings**” in the blue bar then click “**Staff**”.
3. Select or search for the specific posting. Click the position title to open the posting.
   a. Review posting details on the Summary Tab.
   b. Review Applicants on the Applicants Tab.
   c. Review Reports on the Reports Tab.
4. When reviewing the applicants on the Applicants Tab, all applicants should show in the pool, with their respective workflow states reflected. To review “**Finalist List**” go to the “**History Tab**” and look for the Added Note.

Added Note

Finalist List

Recommend for Hire - Jimmy John

Finalist Ranked 2 - Test Brady

Finalist Ranked 3 - Izzo Brady

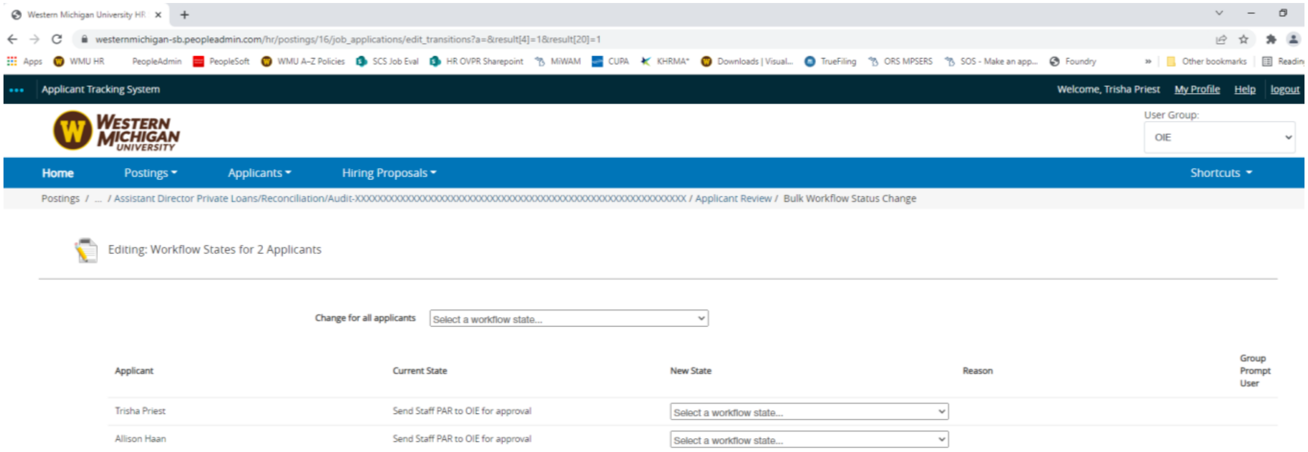
"Applicants by position" 4 Delete this search? Selected records 0 Clear selection? Actions

	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Workflow State Entrance Reason	Application Date	Combined Document	Job Title	(Actions)
☐	Brady	Robert	Resume, Cover Letter	S067P	Not Interviewed, Not Hired	(201) Insufficient related work experience:	May 26, 2022 at 10:27 AM	Generate	Sandbox Final Staff Posting Review	Actions
☐	John	Jimmy	Resume, Cover Letter, List of References	S067P	Send Staff PAR to OIE for approval		August 02, 2022 at 09:03 AM	Generate	Sandbox Final Staff Posting Review	Actions
☐	Brady	Test	Resume, Cover Letter	S067P	Send Staff PAR to OIE for approval		May 20, 2022 at 11:13 AM	Generate	Sandbox Final Staff Posting Review	Actions
☐	Brady	Izzo	Resume, Cover Letter	S067P	Send Staff PAR to OIE for approval		May 20, 2022 at 11:26 AM	Generate	Sandbox Final Staff Posting Review	Actions

   a. To review applicant documents, you could review them:
      i. Individually - Click on each applicant to review their specific application and associated documents (documents will display at the bottom or their application). You can also click” Generate**”** under the “**Combined Document**”. When “**View**” appears, click on this and all documents associated with that applicant will appear.
      ii. Whole pool/multiple applicants –
         1. Place a check in the box to the left of the applicants you wish to review.
         2. Click the orange “**Action**” box above all applicants and select “**Download Applications as PDF**”.
         3. A box to select documents will appear. Make selection and press “Submit”.
5. To approve the Staff PAR, you will need to place a check next to the “finalists” names. Click the orange “**Actions**” box and select “**Move in Workflow**”.
6. When the editing workflow state screen opens, the workflow states will need to be changed for individual applicants to properly move them in the workflow. **(See screenshot below)**

a. Select option to "Change for all applicants" – choose "**Human Resources Final Review**". This will move each applicant to HR.

b. Select specific status updates for each applicant.

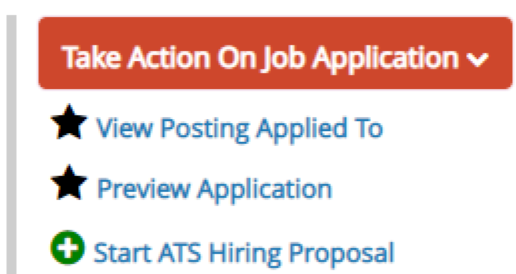


7. Click orange "**Save changes**" box when you are ready to advance the applicants. Otherwise, click cancel to return to the previous page.
8. The workflow statuses for finalists should appear to be at Human Resources Final Review.
9. HR changes chosen applicant to "**Recommend for Hire**". This will begin the hiring proposal.

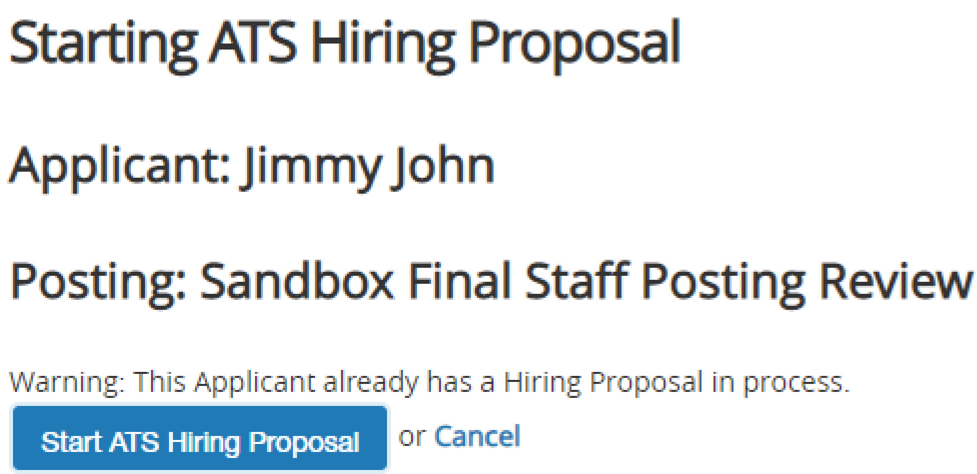
Hiring Proposal (Human Resources and Hiring Agent):

Once HR updates the applicant as "Recommend for Hire", the hiring agent will receive a system notification to reflect that the HR has marked the applicant as "Recommend for Hire". This will initiate the hiring agent to begin the hiring proposal.

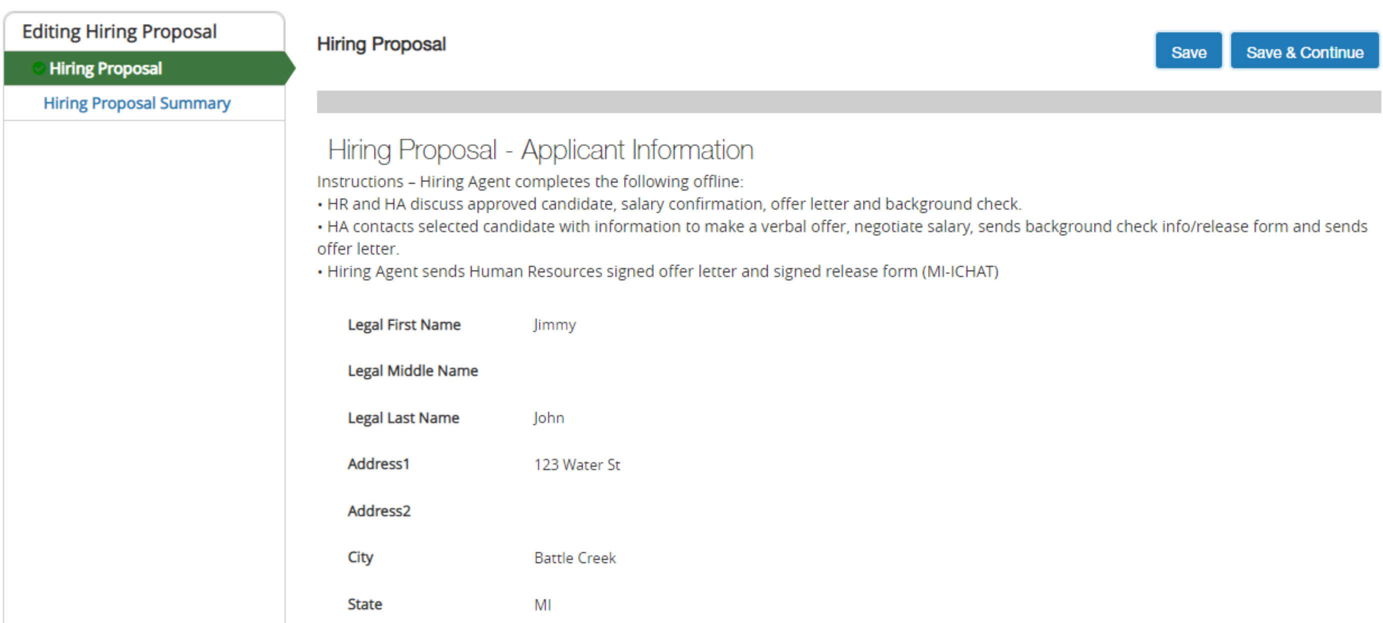
- Ensure the User Group is set to Hiring Agent in the upper right-hand corner of the website.
- Click on the last name of the "recommend for hire" applicant. This will open up the applicant's job application.
- In the menu on the right-hand side, click "**Start ATS Hiring Proposal**".



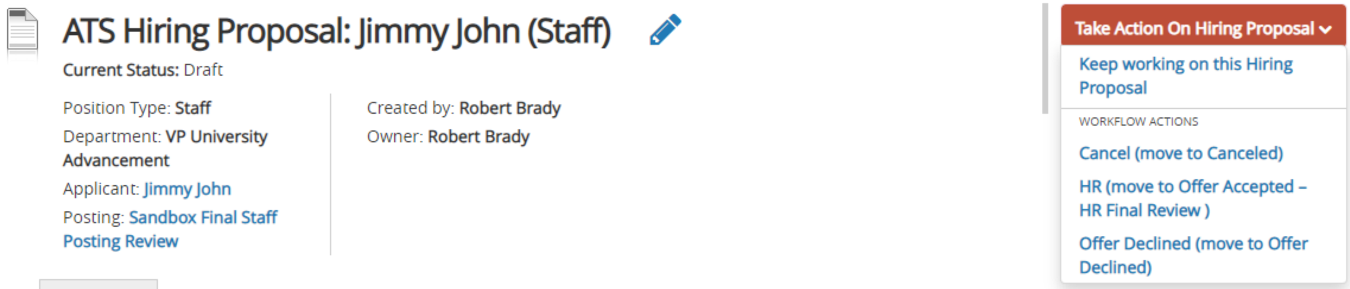
- Click on the blue button that says “**Start ATS Hiring Proposal”**



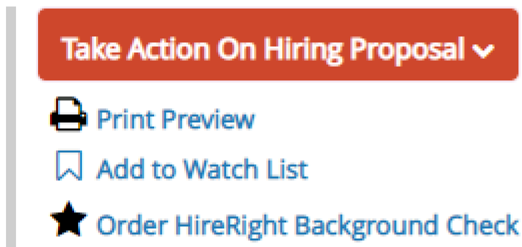
- The Hiring Proposal page will look like the screen shot below. Most of the offer workflow is done “offline”. Pay close attention to required steps to complete the “Hiring **Proposal**”.
    - HR and hiring agent discuss the approved candidate and confirm salary.
    - HR will email a draft offer letter and background check documents
    - The hiring agent contacts the selected candidate to make a verbal offer (and negotiates salary).
    - Once the offer is accepted, the selected candidate completes and sends the background check form and signed offer letter to HR.
    - HR will run the background check and notify the hiring agent of results.



- Once applicant accepts or declines the job offer, HR will update the applicant’s workflow status as accepted or declined. Go to: “**Editing Hiring Proposal**” click on “**Hiring Proposal Summary**” and the following screen will appear. Go to the “**Take Action on Hiring Proposal**” button and choose Offer Accepted or Offer Declined option (See screen shot on following page).



- If offer accepted then the workflow will go to "**HR Final Approval**". HR will do the following:
  - Initiates background check through HireRight by clicking on "**Order HireRight Background Check**"



  - Once received, review background results.
  - Work with the hiring agent to determine a start date.
  - HR completes appointment form information
  - Change all finalist statuses
  - Change New Hire status to Hired (note: this will freeze the system and not allow the appointment form to be completed
  - Designate posting as filled
  - Send applicants appropriate letters
- If offer is declined then HR will receive and email indicating that the offer was declined. HR will go back to the applicant tab and chose the Finalist Ranked 2 and mark" Recommend **for Hire**". Note: the candidate that declined the offer has automatically been marked "**Offer Declined**".

Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Workflow State Entrance Reason
Brady	Robert	Resume, Cover Letter	S067P	Not Interviewed, Not Hired	(201) Insufficient related work experience:
John	Jimmy	Resume, Cover Letter, List of References	S067P	Offer Declined	
Brady	Test	Resume, Cover Letter	S067P	Recommend for Hire	
Brady	Izzo	Resume, Cover Letter	S067P	Human Resources Final Review	

- If the applicant declines, HR updates the candidate status “Offer Declined”, the hiring proposal will be initiated for the finalist ranked 2. The hiring agent will receive a system notification reflecting that the HR has marked the applicant as “Recommend for Hire”. This will allow for the Hiring Agent to begin a hiring proposal for the Finalist Ranked 2 (see steps above). A new salary may need to be discussed.

<u>Overall Summary of Staff Hiring Process:</u>

1. Complete posting.
2. Route for approval before posting.
3. HR will post when the position is received and approved.
4. Receive applications directly to the posting.
5. Update finalist status’ and send Staff PAR to OIE for approval. Ensure all other candidates have been properly classified/dispensed as Not Interviewed/Not Hired or Interviewed/Not Hired.
6. HR and the hiring agent will be notified when OIE approves the Staff PAR.
7. The hiring agent will initiate the hiring proposal and complete offline steps. Prepare/finalize offer letter, complete verbal offer, and send offer letter and background release form to the applicant. Once accepted, the candidate will send HR the signed offer letter and release form and mark the applicant Hiring Proposal as “Offer Accepted”. This will initiate HR to start the background.
8. Upon receipt, hiring agents will be notified of the background check results.
9. HR will complete the appointment form for the hire.
10. HR will disposition all remaining applicants.
11. HR will designate the position as filled. The system will send out letters to candidates not hired.