ONLINE APPLICANT TRACKING SYSTEM

USER’S GUIDE

FOR HIRING AGENTS
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INTRODUCTION

Welcome to the Western Michigan University’s online applicant tracking system, used exclusively for filling benefits-eligible University positions. This User’s Guide is provided to assist with your understanding and use of this system. If you require additional assistance, please contact your assigned Human Resources Representative.

You will use this system to:

- Receive employment applications, resumes, cover letters, and vitas on the Web, eliminating much of the data entry and delays associated with the traditional paper process.
- Use job-specific qualifying questions to dramatically reduce the need to review every application for minimum qualifications.
- Allow hiring managers and entire search committees to review employment applications, resumes, cover letters and vitas online. Hiring managers may even track search results and enter reasons for non-selection online.
- Allow candidates to access job information via a secure Web account. In addition, candidates will receive an email confirmation from the system when their application is received and if they are not selected for a position.
- Notify Human Resources and the Office of Institutional Equity of your decisions regarding the status of each applicant.

Your Web browser

The online applicant system is designed to run in a Web browser over the Internet. Browsers that are routinely tested for product support are:

- Internet Explorer 7.0 for Windows XP and Windows 2000
- Mozilla Firefox 1.5 and 2.0 for Windows XP, Windows 2000, and Mac OS X

Browsers that have no known issues but are NOT routinely tested for product support are:

- Internet Explorer 6.0 for Windows XP and Windows 2000
- Mozilla Firefox 1.5 for Linux and Unix
- Apple Safari 1.2 for Windows XP, Windows 2000, and Mac OS X

Browsers that are not certified or have never been tested (and therefore are not recommended) are Opera, AOL, and WebTV.

Not sure what version of your browser you’re currently using? Go to your tool bar, click on Help, and then click on the “About” link, such as “About Internet Explorer” or “About Mozilla Firefox”. The window that pops up will tell you what version you are in.

Please notify your department’s system administrator of any significant issues that arise.

The site also requires you to have Adobe Reader installed. This is a free download available at www.Adobe.com. Follow your departmental procedure for downloading software.

Do not use your browser’s “back”, “forward” or “refresh” buttons to navigate the site, or open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within the site.

Security of applicant data

To ensure the security of the data provided by applicants, the system will automatically log you out after 60 minutes of inactivity. However, anytime you leave your computer we strongly recommend that you save any work in progress and logout of the system by clicking on the logout link located on the bottom left side of your screen.
HIRING PROCESS OVERVIEW

1) Request a Position Authorization (PA) from the Budget Office (387-4275) for all vacant benefits-eligible positions to be filled.
   a) Complete the Position Authorization form, marking “replacement” and forward PA form for signatures.
   b) Human Resources (HR) will contact the hiring agent once the PA is received.
   c) HR creates the posting on the online applicant system and forwards to the hiring agent for review (see page 8 for details).
   d) Hiring agent reviews posting and sends back to HR to post.
   e) Positions are posted internally for one (1) week. Hiring agents may request a “no-post exception” or “simultaneous search.”

   A “no-post exception” is a request made to the Office of Institutional Equity (OIE) to obtain permission to hire a candidate into a WMU position without posting the job. The request can be in the form of a memo or an e-mail that indicates the position number or job requisition number (if known) and the rationale for the request. Attach a copy of the external candidate’s resume/vitae and a description of the position. Please be mindful that this procedure is an exception to our regular hiring procedures and will be approved only under extraordinary circumstances.

   A “simultaneous search” is a request made to OIE to obtain permission to post a job both internally and externally at the same time.

2) Review internal candidates

   NOTE: If NO internal candidates applied for the position, go to Step 3 (external search).

   a) Evaluate credentials and determine interviewees (all interviewees must meet the minimum qualifications for the position).
   b) Conduct interview(s) with selected candidates.
   c) After the interview, contact your HR Representative to review candidates’ employee files.
   d) Check references for final candidate(s).
   e) Complete the applicant statuses online for all candidates.
   f) Forward decision to the Office of Institutional Equity (OIE) for approval.

   If internal candidate approved for hire:

   1. Work with your HR Representative to discuss an appropriate pay rate and any required post-offer background checks and physicals.
   2. Make a verbal, conditional, job offer to approved finalist.
   3. Follow-up the verbal, conditional offer with a letter of offer and any necessary background check documents (contact your HR Rep for the appropriate letter and documents).
   4. HR generates the Staff Appointment (SA) form and contacts hiring agent to pick up the SA form.
   5. Hiring agent completes the Staff Appointment form and route for signatures and processing.
7. Conduct probation reviews in accordance to the policy in which the position is governed. You may also consult with your Human Resources Representative about the probation policy for your new hire.

If internal candidates applied for the position, but none are selected or approved for hire, work with your Human Resources Representative to post externally.

3) External Search

   a) Evaluate credentials and determine interviewees (all interviewees must meet the minimum qualifications for the position).
   b) Conduct interview(s) with selected candidates.
   c) If external candidate is a former WMU employee, after the interview, contact your HR Representative to review candidate’s employee file.
   d) Check references for final candidate(s).
   e) Complete the applicant statuses online for all candidates.
   f) Forward decision to the Office of Institutional Equity (OIE) for approval.

If external candidate approved for hire:

   1. Work with your HR Representative to discuss an appropriate pay rate and required post-offer background checks and physicals.
   2. Make a verbal, conditional, job offer to approved finalist.
   3. Follow-up the verbal, conditional offer with a letter of offer and any necessary background check documents (contact your HR Rep for the appropriate letter and documents).
   4. After background check successful results are received and reviewed, HR generates the Staff Appointment (SA) form and contacts hiring agent to pick up the SA Form.
   5. Hiring agent completes the Staff Appointment form and route for signatures and processing.
   6. Computer Access information (Bronco NetID, E-mail, WIN #) will be sent via e-mail to the hiring agent to share with the new employee.
   7. I-9 Form information will be sent by e-mail to the employee and hiring agent. The Form I-9 verifies an employee’s identity and eligibility to work in the United States.
   8. Online Benefits Orientation information will be sent via e-mail to both the new employee and hiring agent.
   10. Conduct probation reviews in accordance to the policy in which the position is governed. You may also consult with your Human Resources Representative about the probation policy for your new hire.
GETTING STARTED

Hiring agents must create a user account to review posting and application materials. After entering the URL (www.wmujobs.org/hr), the login screen for the system will appear and should be similar to the following screen:

First time users must create an account (see page 7).

If not a first time user and you’ve already created an account, start with “Posting Submitted for Review” (see page 8).
As a first time user, to enter the site you must create your own account by clicking on the Create User Account link on the left side of the screen. After you click this link, the following screen will appear:

Enter a user Bronco NetID and then enter the rest of the requested information.

After completing this form, click Continue, and you will be asked to review your information. After you have reviewed it, click Submit. Your request will then be sent to Human Resources, where your account will be approved or denied.

Human Resources will notify you via e-mail that your request has been accepted. You will then be able to log into the system with your Bronco NetID and password. Please note that you only need to create a user account once. If you have problems logging in, please contact your Human Resources Representative.
POSTING SUBMITTED FOR REVIEW

Reviewing and submitting the posting
Hiring agents, chairs, and directors will get an e-mail notification when Human Resources has created a posting for review.

To review the posting, hiring agents may log into the system and click on Pending Postings on the left hand navigation menu. All of your postings pending approval will be located on the Pending Postings screen.

To view the position details, click on the "View" link below the Title. To sort by any column, click on the arrow next to the column title.

To review the posting to be approved, click on View which will take you to the View Summary page.
Discuss any changes or corrections with your HR Representative. Change the posting status to **Send to HR to Post** and click the **Continue** button either at the top or the bottom of this page.

Press **Confirm** to complete this step.
REVIEWING APPLICANTS TO YOUR POSTINGS

When you log into the system, you will see a screen that looks similar to the screen shot below. You may view applicants online at any time during the posting process.

Below the **Job Postings** heading on the left navigation bar, there are options to view **Active** and **Historical** postings.

**Active postings** are:
- Currently posted on the applicant site, or
- No longer posted but contain applicants still under review

**Historical postings** are:
- Filled and are no longer listed on the applicant Web site, or
- Cancelled and therefore not listed on the applicant Web site

To review the applicants and details for a specific posting, please click View under the **Job Code Description** heading. This brings you to the **View Postings** page.
You will notice the posting data is divided into tabs, listed across the top, starting with Applicants. This first tab lists applicants who have applied to this posting. Additional information is also provided on this screen, including date applied, status, etc.

### Applicants

<table>
<thead>
<tr>
<th>Name</th>
<th>Documents</th>
<th>Score</th>
<th>Date Applied</th>
<th>Status</th>
<th>External Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>One, Applicant</td>
<td>Res, Ltr, Ref</td>
<td>0</td>
<td>03-16-2011</td>
<td>Under Review by HA</td>
<td>In Progress</td>
</tr>
<tr>
<td>Two, ApplicantA</td>
<td>Res, Ltr</td>
<td>0</td>
<td>03-16-2011</td>
<td>Under Review by HA</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

From the screen shown above you may perform a number of tasks, including:

- Sort and view applicants by different criteria.
- Print applications and documents as necessary.

To view posting information, use the following tabs:

- Posting details
- Posting specific questions
- Disqualifying/Points

The **Posting Preview** link at the top of the page will give you a snapshot of the posting.
Sorting and filtering applicants by different criteria

To sort applicants by name, date applied, etc., click the arrow at the top of the data column you wish to sort. The order in which applicants are displayed will change accordingly.

If the posting assigned points for questions, the applicant scores will appear here. To filter applicants by score, enter a numeric value in the Minimum Score box, and click Refresh. Only applicants meeting the score entered (and higher) will be included in your results.

You may also choose to show active applicants, inactive applicants, or both. This is performed by checking the boxes in the refresh section next to Active Applicants (active applicants are those still under review) and Inactive Applicants (inactive applicants are no longer under review). Click the Refresh button to refresh the screen.

Viewing and printing applications

It is not necessary to print applications to retain in departmental files. The system will retain all applicant documents per the University retention policy. Please note, however, that all applicants who are interviewed must sign a printed copy of their original application at the time of the interview.

See screen on page 11.

Single application

To view and print a single application, perform the following steps:

1. Click the link View Application under the applicant's name from the Active Applicants screen (the screen shown on the previous page). After clicking on this link the application will appear in a new browser window (it may take a few moments for the information to load).
2. Select File > Print from your browser’s menu to print the application. There is a signature line at the bottom of the application for obtaining the applicant’s signature, as necessary.

Multiple Applications

To view and print multiple applications at the same time, perform the following steps:

1. Check the boxes next to the corresponding applicants whose applications you wish to print (or click the All/None link). These boxes are located on the right side of the page. (See top of next page.)
2. Click the View Multiple Applications button.
3. A new window will appear (it may take several moments to load). This window contains all the applications you selected to print.
4. Select File > Print from your browser’s menu to print the application(s).

To close the window, click the Close Window link, or click the X in the upper right-hand corner of the window (this will not log you out of the system – it will simply return you to the list of applicants on the View Applicants screen).
Viewing and Printing Documents
This process is very similar to printing applications, except the documents appear in the Adobe Reader software. This is done to preserve the integrity of the documents’ formatting, and to assist in preventing viruses from entering the system via documents attached by applicants.

Single document
To view and print a single document (such as a resume or cover letter) that the applicant attached when applying for the posting, perform the following steps:
1. Click the link of the document in the column labeled Documents from the Active Applicants screen. After clicking the link, a new window will appear (it may take several moments to load) in Adobe Reader. This window contains the document for the applicant you selected to print.
2. Select File > Print from the Adobe Reader menu to print the document.

Multiple documents
To view and print multiple documents at the same time, perform the following steps:
1. Check the boxes next to the corresponding applicants you wish to print (or click the All/None link). These boxes are located on the right side of the page.
2. Click the View Multiple Documents button.
3. Select Files>Print from the Adobe Acrobat menu.

To close the window, click on the X in the upper right corner of the window (this will not log you out of the system – it will simply return you to the list of applicants on the View Posting screen).

SELECTION AND APPROVAL PROCESSES

Staff: Selecting applicants and securing approval of the electronic Position Activity Record (ePAR)

After the screening and interviewing process is complete, make your final selection and send to the Office of Institutional Equity (OIE). Once logged in you will see the Active Postings table. Click VIEW to select the posting and to bring you to the Applicants section. Click Status to change applicant status.

- The applicants that will move forward will be determined by their applicant status and selection reason.
- Use the drop down box to select a status and selection reason for each applicant.
- The applicant status options are as follows:
  - Recommend for hire – status for the first choice candidate.
  - Finalist – for second, third, or fourth choice candidates. Use the selection reason for rankings.
  - Not Interviewed – Not Hired. You must include a selection reason with this status.
  - Interviewed – Not Hired. You must include a selection reason with this status.
- Applicants not selected as recommend for hire or finalist will be considered inactive for the posting.

- Once the applicants’ status has been changed and the finalist(s) ranked, the electronic PAR is complete. Next, click View Posting Summary at the bottom of the page. Change the posting status to Send Staff PAR to OIE and click Continue. The Office of Institutional Equity will then receive notice that an ePAR is pending approval.
Once OIE approves your electronic PAR, you will receive an email notification. Please contact your assigned HR Representative to finalize the hiring process.
Faculty: Selecting candidates and securing approval of the pool/short list and electronic Position Activity Record (ePAR)

Once the screening process is complete:

1) The chair/director logs into the system to a) change the applicant status for all applicants, and b) change the posting status to **Pool/Short List under Review by Dean**. An automatic email notification is forwarded to the Dean stating that the faculty pool/short list is available for review.

2) The Dean logs into the system to review the pool/short list and has offline discussion with chair/director to resolve any issues. Dean approves the pool/short list by changing the posting status to **Pool/Short List Approved by Dean**. An automatic email notification is forwarded to the Office of Institutional Equity indicating that the pool/short list is ready for review.

3) OIE logs into the system to review the pool/short list and has offline discussion with chair/director to resolve any issues. OIE approves the pool/short list by changing the posting status to **Pool/Short List Approved by OIE**. An automatic email notification is forwarded to the Provost stating that the pool/short list is ready for review.

4) The Provost logs into the system to review pool/short list and has offline discussion with chair/director to resolve issues. Provost approves the pool/short list by changing the posting status to **Pool/Short List Approved by Provost**. An automatic email notification is forwarded to the chair/director stating that the pool/short list has been approved and to proceed with interviews and the final selection process.

Once the interviewing process is complete:

5) The chair/director logs into the system to a) change applicant status for some applicants, and b) changes the posting status to **Faculty ePAR under Review by Dean**. An automatic email notification is forwarded to the dean stating that the faculty ePAR is available for review.

6) The dean logs into the system to review the faculty ePAR and has offline discussion with chair/director to resolve any issues. Dean approves faculty ePAR by changing posting status to **Faculty PAR Approved by Dean**. An automatic email notification is forwarded to OIE stating that the faculty ePAR is ready for review.

7) OIE logs into the system to review the faculty ePAR and has offline discussion with chair/director to resolve any issues. OIE approves faculty ePAR by changing posting status to **Faculty ePAR approved by OIE**. An automatic email notification is forwarded to the Provost stating that the faculty ePAR has been approved by OIE and is ready for review.

8) The Provost logs into the system to review the faculty ePAR and has offline discussions to resolve any issues. Provost approves the faculty ePAR by changing the posting status to **Faculty PAR Approved by Provost**. An automatic email notification is forwarded to chair/director and Human Resources stating faculty ePAR has been approved to extend an offer.

- The applicants that will move forward will be determined by their applicant status and selection reason.
- You must select a status and selection reason for each applicant.
- Applicant status options are as follows:
  - Continued – active status candidates who meet minimum qualifications.
  - Short List Finalist – active status candidates who must be listed in rank order.
  - Rejected – dispensed status for candidates who will not receive further consideration.
  - Short List Candidate – Not Hired – dispensed status for candidates who were interviewed.
  - Short List Candidate – Not Hired – dispensed status for candidates who received consideration but were not interviewed. You must include a reason code with this status.
GUEST USER INFORMATION

When you log into the system, you will see a screen that looks similar to the screenshot below. The posting data is divided into tabs, and listed across the top is the **Guest User** tab. To access the posting’s guest user name and password, the hiring agent or chair/director must click the Guest User tab. The guest user name and password are unique to each posting and should be shared with only those associated with the hiring process for the position.

When using a search committee, the hiring agent and chair/director may give the guest user name and password to the search committee members. This will allow your search committee members to access the posting to view the applicant documents. Guest users may view applicants online at any time during the posting process.
ACADEMIC DEPARTMENTS PROCESSING STAFF V. FACULTY POSTINGS

As an academic user of the online applicant tracking system, you may have two roles:
⇒ One as a ‘Hiring Agent’ to process staff postings
⇒ One as a ‘Chair/Dir’ to process faculty postings

EACH TIME you log in to the online system, you'll need to check/update your Default View & User Type in order to correctly process the postings.

To Process/route FACULTY postings for review & approval, this is what you’ll need to select:
⇒ User Type = Chair/Dir
⇒ Default View = Department

To Process/route STAFF postings for review & approval, this is what you’ll need to select:
⇒ User Type = Hiring Agent
⇒ Default View = Department

You can change your Default View & User Type at any time.
To keep the last change you’ve made to the Default View, click the ‘Change for Future Sessions’ button.

SCREENS

Change User Type

- Hiring Agent: Use to process staff positions
- Chair/Dir: Use to process faculty positions

Change Default View

- Change View:
  - User
  - Department

- Change for this session
- Change for future sessions
- Cancel