MONTANA STATE UNIVERSITY – PEOPLEADMIN APPLICANT TRACKING SYSTEM (ATS)

POSTING STAFF POSITIONS IN APPLICANT TRACKING

Getting Started – items to have prior to logging into the system:

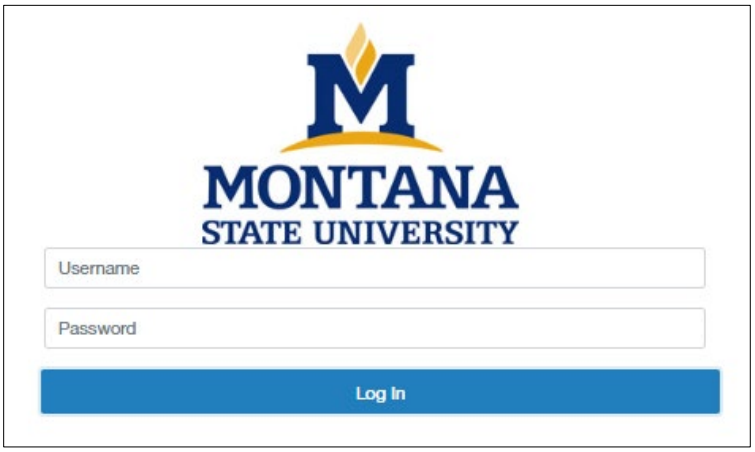
- RAF (Recruitment Authorization Form) – approval queues are done through the system.
- Search Committee Members – when known (Email ATShelpdesk@montana.edu with the names of Search Committee Members that have not been added into the system.)
- Guest Search Committee Members – please notify ATShelpdesk@montana.edu if you have invited someone who is outside of MSU to participate on the search committee. We can provide the guest search committee member the ability to access the system to view the applications and score each applicant in the system.
- Advertising Sources – when known, create a list of where the position will be advertised.

The following instructions will walk you through how to post a position. There are instructions for posting a Staff position (Classified, Professional, Administrative, and Executive positions) and for posting Faculty positions and Temporary positions.

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 UIT link and update you NetID password, for the network:* http://www.montana.edu/uit/ids-services/portal.html

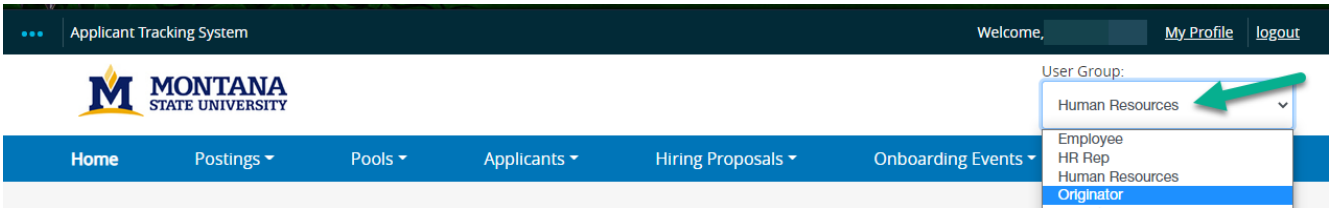
NOTE: The online Applicant Tracking system (ATS) works best with Chrome, Firefox, or Safari (5 or higher). It is recommended that you utilize one of these Internet Options.

Inactivity of 15 minutes will time you out of the system you will lose any unsaved data.

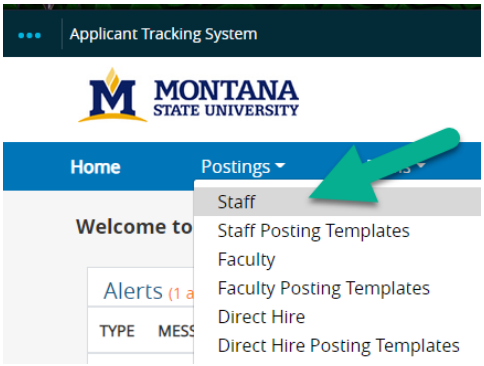
Clicking "Next" on any page will automatically save the page and move you to the next page. "Save" saves the current page without advancing to the next step.

Role

- The recruitment module will say Applicant Tracking System in the upper left and will have a blue navigation bar
- If you see an orange navigation bar and Position Management in the upper left corner, click on the 3 dots and select Applicant Tracking System

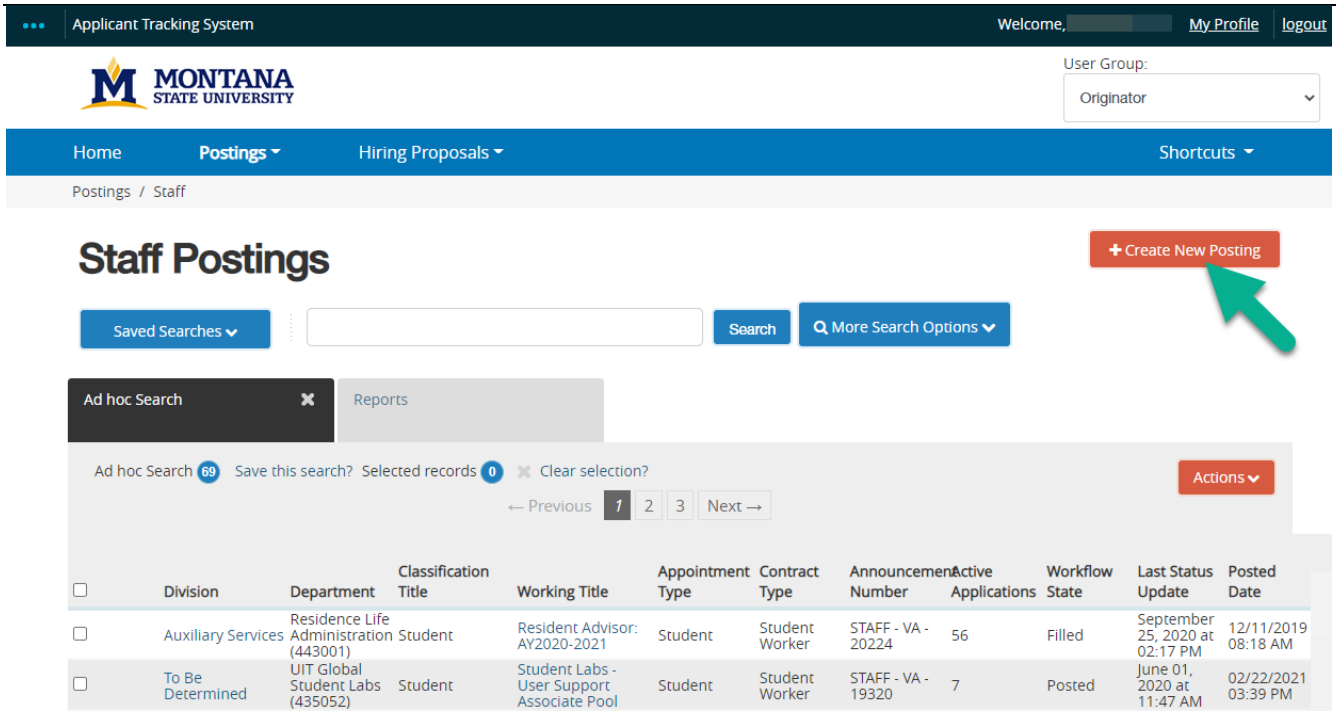


- Roles that have the authority to start a posting vacancy to Post:
  - Originator
  - Hiring Authority
  - HR Rep
  - Human Resources
  - UHR
- Ensure you are logged in as the appropriate role
- Click the drop-down arrow to select the appropriate role

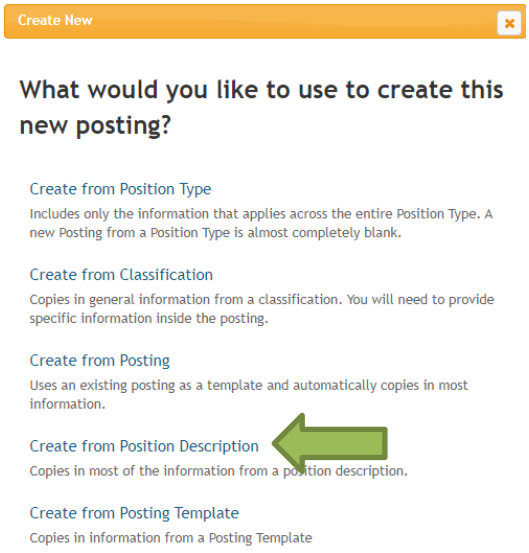


- In the **Postings** tab, select “Staff”

POSTING A STAFF POSITION

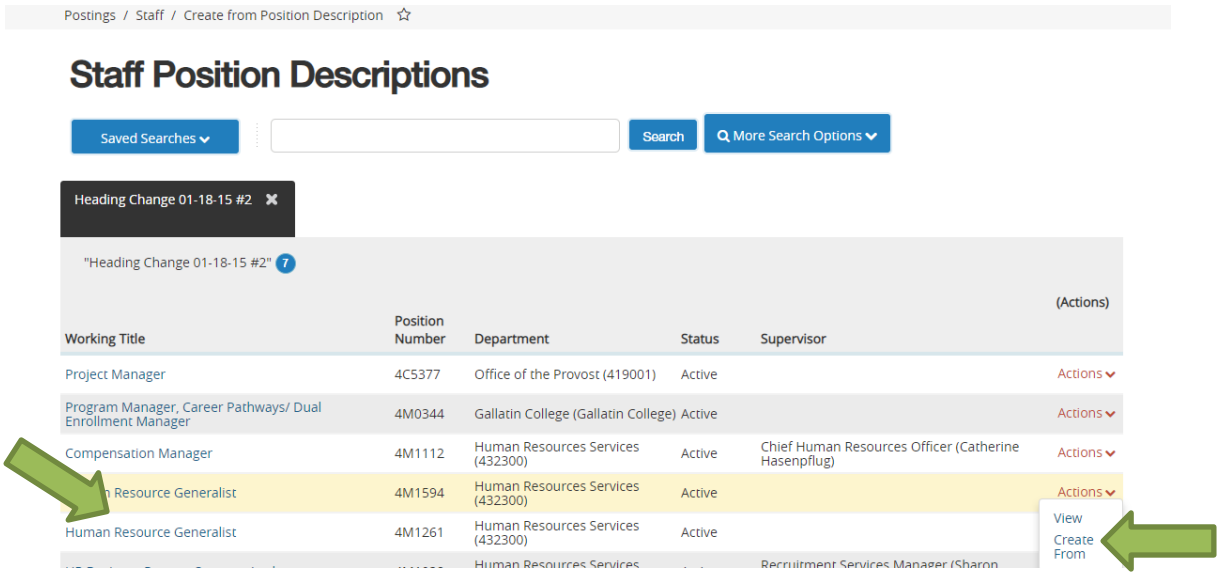


- The following actions can be taken:
  - If the **Posting** already exists, click on the title of the position, and edit
  - To start a new posting; Click on "**Create New Posting**"

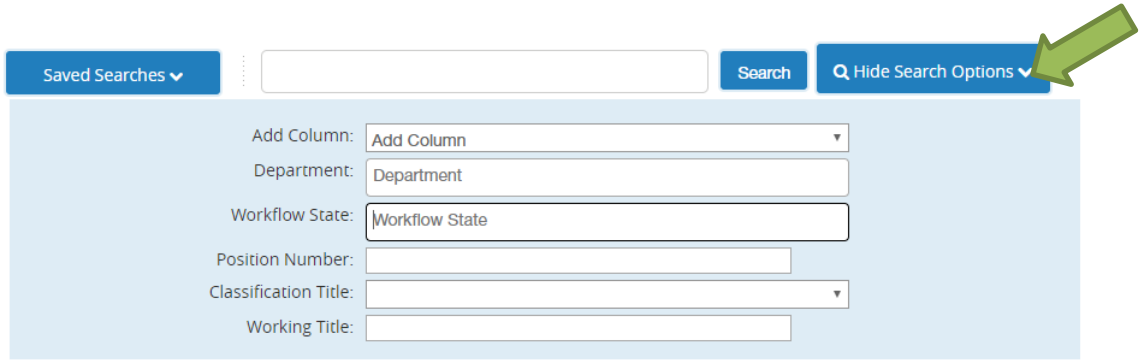


- The posting can be created from these options.
- For new positions, select **"Create from Position Description"** (best practice)
- **"Create from Position Type"** is for **Temporary & Student Positions only**
- Positions previously posted; the new posting can be created from the previous posting*

*<u>*Not recommended, previous errors will be recreated and may not editable</u>*

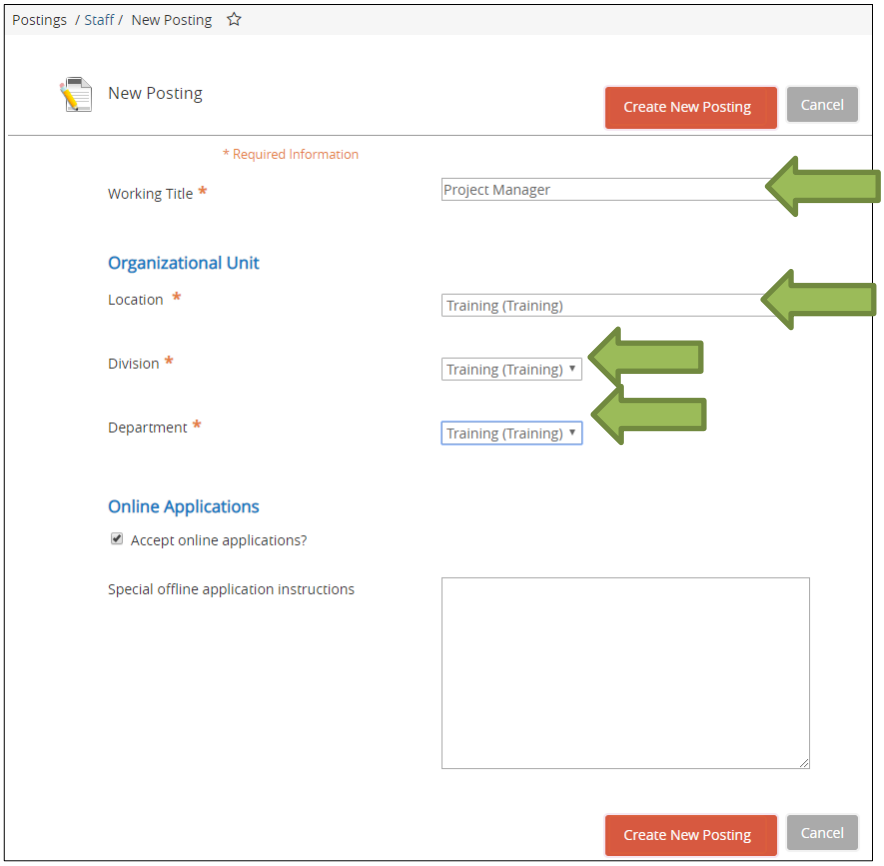


- In the **Working Title** column, locate the position that is to be posted
  - Click on working title to preview the position description before creating from it
- In the **Actions** column, click the **down arrow**
- Select **Create From** when position description is known to be up-to-date and ready for posting



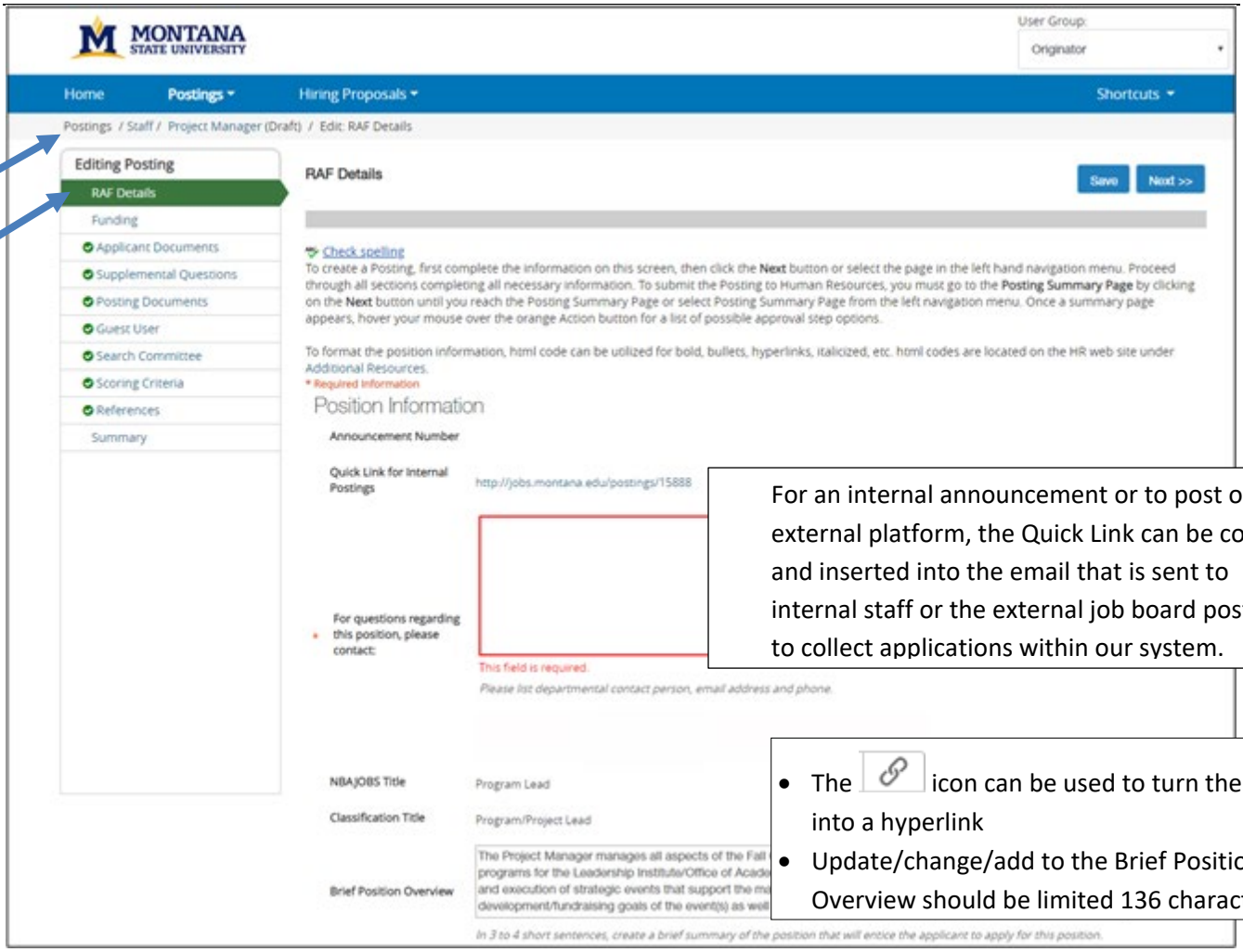
- If the list is long, use the **More Search Options** to open the tool.

- Review Position Description to make sure information is accurate.
- Select **Create Posting from the Position Description**
- If errors found in position description use Modify Position Description to start corrections



- Review the following and change if necessary:
  - Working Title
  - Location
  - Division
  - Department
- Applicant Workflow – Default is **Application Queue**. **Search Committee Review** gives Committee access to the applications. (Uncheck if search firm is being used.)
- **(OPTIONAL)** – Special Offline Application Instructions – Provide instructions for applicants who apply offline, usually for when a search firm is being used.
- Click **Create New Posting**

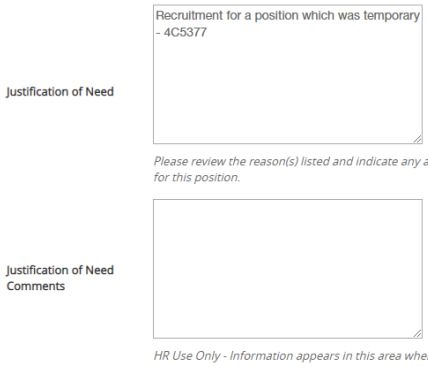
POSTING A STAFF POSITION – RAF DETAILS



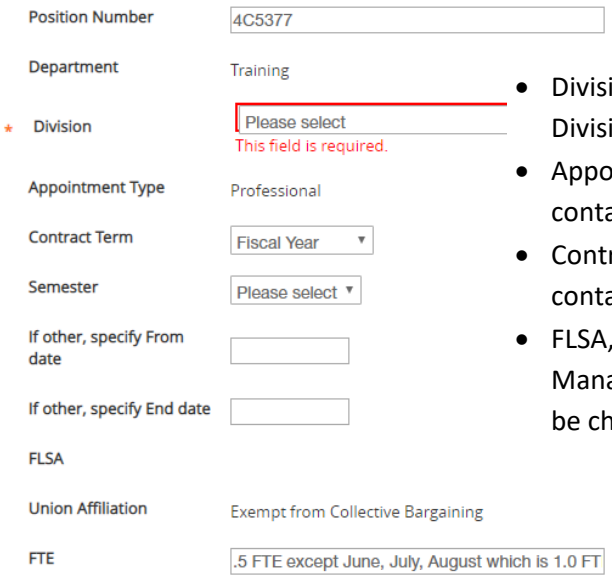
For an internal announcement or to post on external platform, the Quick Link can be copied and inserted into the email that is sent to internal staff or the external job board posting, to collect applications within our system.

- The icon can be used to turn the email into a hyperlink
- Update/change/add to the Brief Position Overview should be limited 136 character.

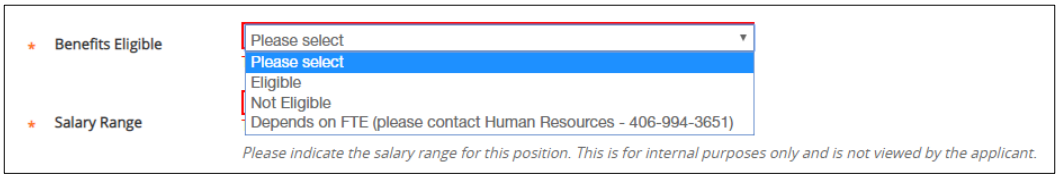
- In the RAF Details, enter any additional information desired for the posting. Many details will carry over from the Position Description.
- ***Note: the system indicates at all times what step you are at in these two areas.***



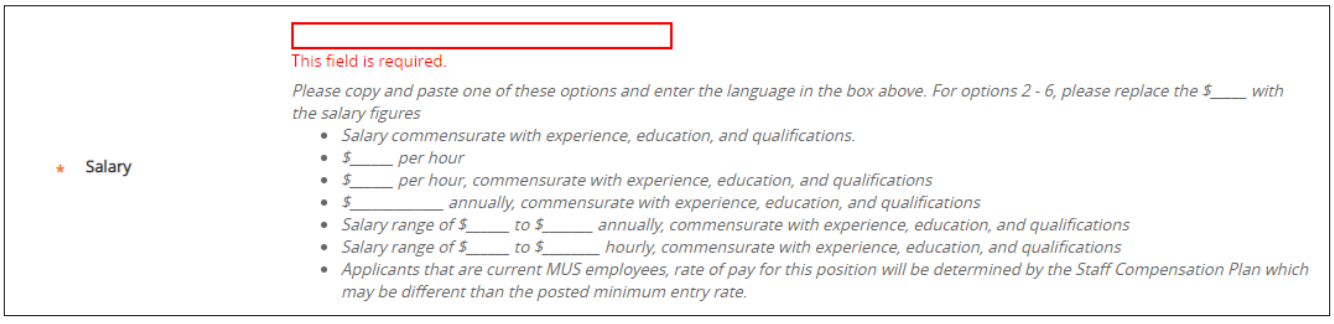
- Update/change/add to the Justification of Need.



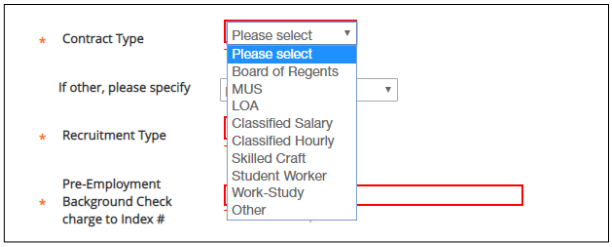
- Division – click the drop-down arrow and select the appropriate Division for this position.
- Appointment Type – pulls in from Position Management (please contact your HR Generalist if this needs to be changed.)
- Contract Term – pulls in from Position Management (please contact your HR Officer if this needs to be changed.)
- FLSA, Union Affiliation and FTE – pulls in from Position Management (please contact your HR Generalist if this needs to be changed.)



- Benefits Eligible – please select one of the options (applicant sees this information in the posting):
  - Yes – if the position is eligible for benefits (confirm with HR Officer if unknown)
  - No – if the position is not eligible for benefits
  - Depends – select this option if the benefits eligibility depends on several factors that are determined once the employee begins his/her employment. (Example: NTT appointments)

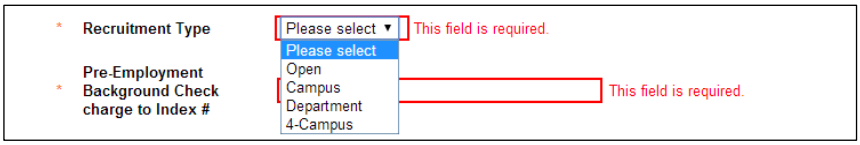


- Highlight the salary option desired for this position
- Either right click and copy or press control + C to copy the text
  Paste into the Salary box, replacing the $_____ with the rate of pay (include the $ sign).

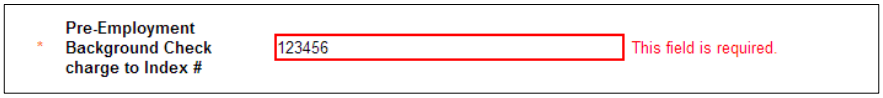


- Contract Type – from the drop-down menu, select the type of contract for this position

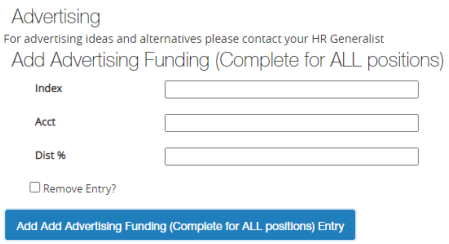
- If this position has a contract type not listed under Contract Type, select "Other"
- In the "If Other, Please Specify" field, click the drop-down arrow and select the appropriate "other" contract type.



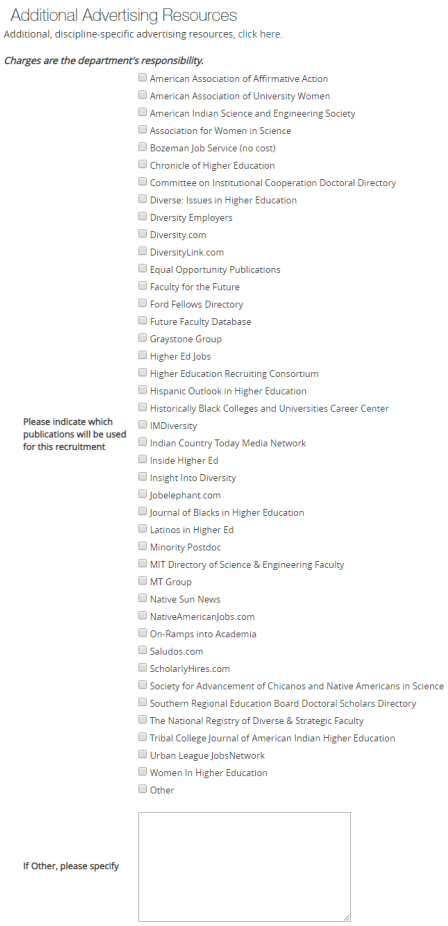
- Recruitment Type – from the drop-down menu, select the type of recruitment



- Enter the Index number that the background check will be charged to



- MSU is no longer advertising in the Bozeman Chronicle. HR Generalist have advertising options.
- Click the Add Advertising Funding Entry button. This information is necessary for HR to bill the appropriate department for additional advertising.
- Enter the appropriate index.
- Enter the appropriate account.
- Enter the appropriate distribution percentage. The cost of the ad can be split between several indexes.
- To add additional indexes, click the Add Advertising Funding Entry button and enter the appropriate information.
- ***NOTE: the system does not total the Distribution percentage. Distribution percentages must total 100%.***


Additional Advertising Resources

Additional, discipline-specific advertising resources, click here.

Charges are the department's responsibility.

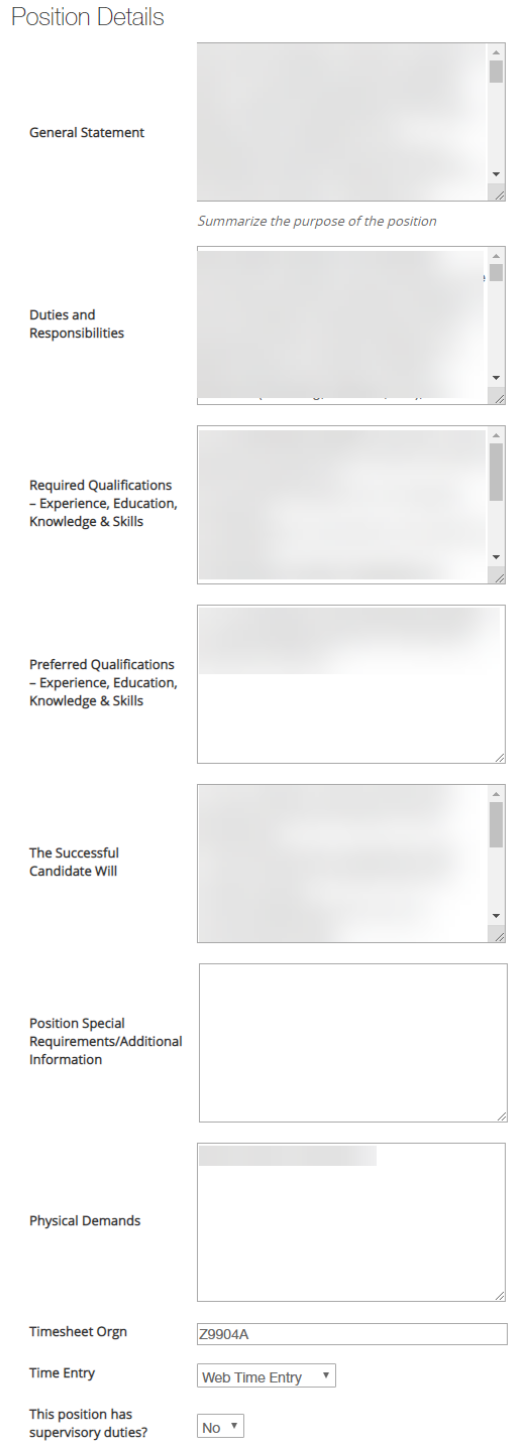
Please indicate which publications will be used for this recruitment

- American Association of Affirmative Action
- American Association of University Women
- American Indian Science and Engineering Society
- Association for Women in Science
- Bozeman Job Service (no cost)
- Chronicle of Higher Education
- Committee on Institutional Cooperation Doctoral Directory
- Diverse: Issues in Higher Education
- Diversity Employers
- Diversity.com
- DiversityLink.com
- Equal Opportunity Publications
- Faculty for the Future
- Ford Fellows Directory
- Future Faculty Database
- Graystone Group
- Higher Ed Jobs
- Higher Education Recruiting Consortium
- Hispanic Outlook in Higher Education
- Historically Black Colleges and Universities Career Center
- IMDiversity
- Indian Country Today Media Network
- Inside Higher Ed
- Insight Into Diversity
- Jobelephant.com
- Journal of Blacks in Higher Education
- Latinos in Higher Ed
- Minority Postdoc
- MIT Directory of Science & Engineering Faculty
- MT Group
- Native Sun News
- NativeAmericanJobs.com
- On-Ramps into Academia
- Saludos.com
- ScholarlyHires.com
- Society for Advancement of Chicanos and Native Americans in Science
- Southern Regional Education Board Doctoral Scholars Directory
- The National Registry of Diverse & Strategic Faculty
- Tribal College Journal of American Indian Higher Education
- Urban League JobsNetwork
- Women In Higher Education
- Other

If Other, please specify

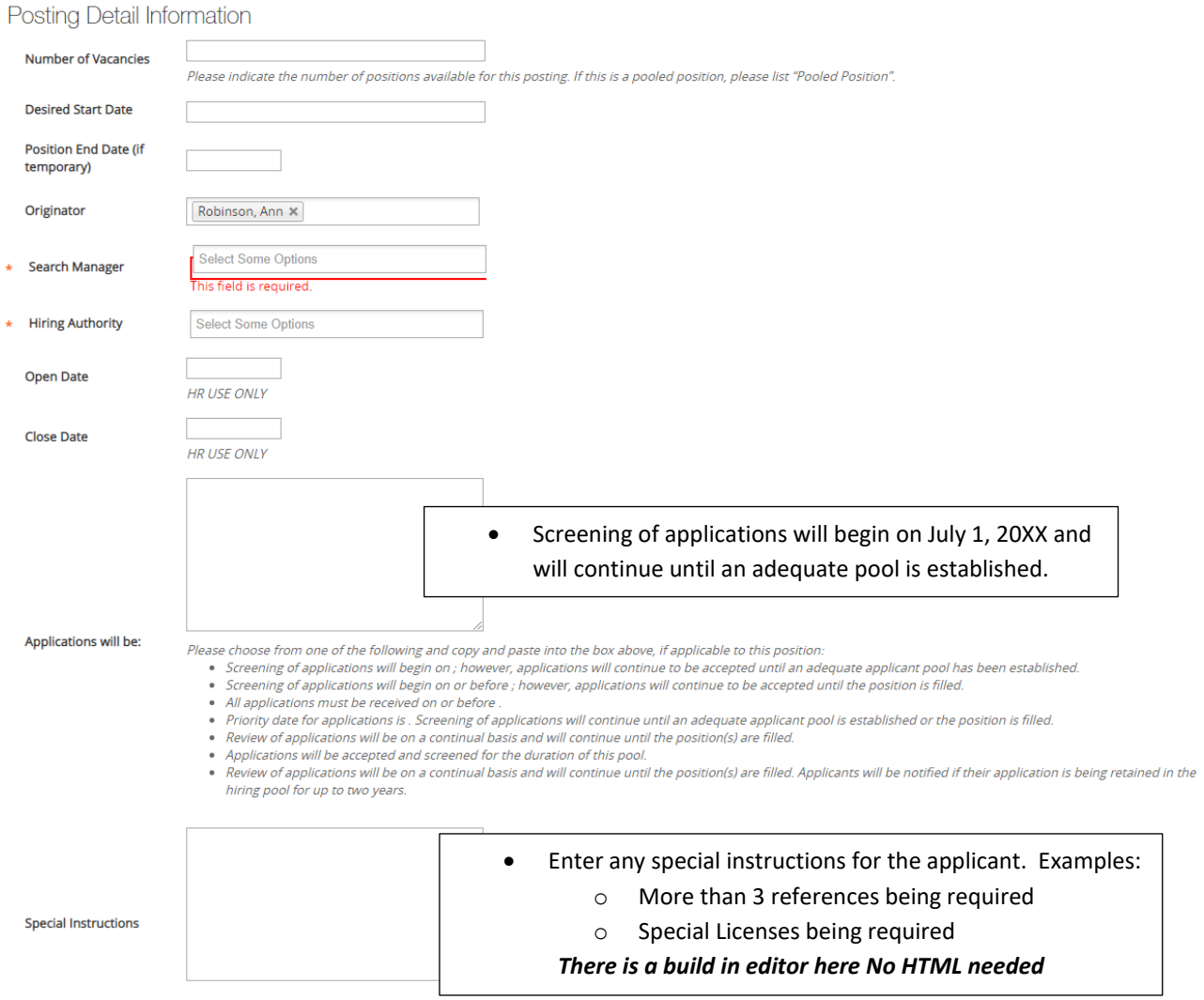
- Indicate where this position will be advertised.
- If select “Other”, indicate in the next box the additional advertising resources. Charges for other advertising are the department’s responsibility.
- Please contact you HR Generalist for available HR available advertising options.

POSTING A STAFF POSITION – RAF DETAILS (continued)



- The **Position Details** carry over from the **Position Description** that was created in **Position Management**. These fields ***should not be edited***.

POSTING A STAFF POSITION – RAF DETAILS (continued)



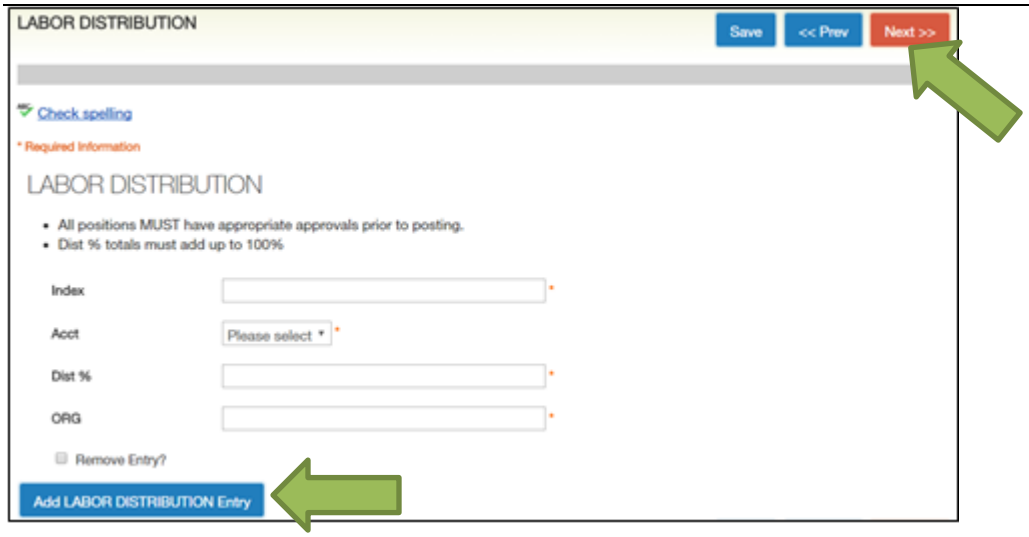
- Screening of applications will begin on July 1, 20XX and will continue until an adequate pool is established.

- Enter any special instructions for the applicant. Examples:
  - More than 3 references being required
  - Special Licenses being required

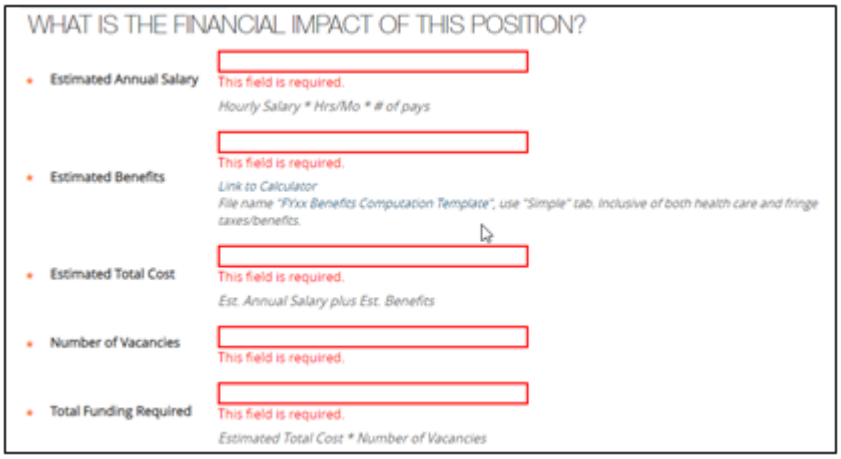
There is a build in editor here No HTML needed

- Number of Vacancies – enter the number of positions to be filled.
- Desired Start Date – enter the date you would like/anticipate the candidate to start employment with MSU.
- Position End Date – (not required) – if this position has a firm end date, enter the date
- Originator, Search Manager & Hiring Authority – click in the box and select the appropriate employee that will serve these roles for this recruitment.
- Note: Originator, Search Manager, and Hiring Authority fields will list names of people in your department with those roles in the system.
  - ***Note: if the employee who will serve in the roles of Originator or Hiring Authority are not in the drop down list, please contact your HR Team or atshelpdesk@montana.edu to update the employee's user groups in the system. The system may take up to an hour to update before the employees show as an option in the Originator and/or Hiring Authority fields.***
- Open Date – Leave Blank
- Close Date – Leave Blank (use close date only if hard close date for the position; otherwise leave blank. If date is entered, the system will automatically remove the posting on the specified date.)

POSTING A STAFF POSITION – Funding



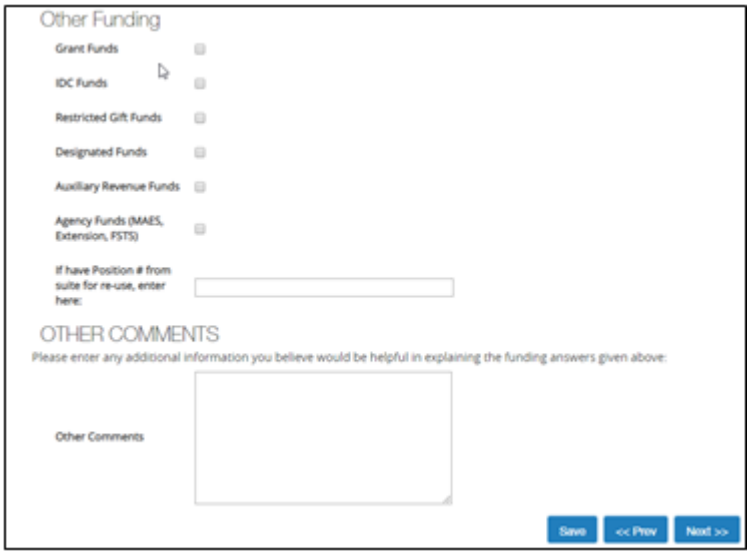
- This Information should carry over from your Position Description
- Enter the Labor Distribution to build the position in Banner. This should reflect how the employee's paycheck will be charged and how the position should be budgeted in NBAPBUD.
- Add the Labor Distribution information by clicking on the **Add Labor Distribution Entry** button
- Enter the Index number
- Select the Account Number from dropdown.
    - ***Staff Classified 61125***
    - ***Contracted 61124***
    - ***Faculty 61123 (position type not currently built in PM)***
    - ***NTT 61123N (position type not currently built in PM)***
- Enter the % of distribution (all entries must equal 100%)
- If there is a split distribution, click on the **Add Labor Distribution Entry** to add as many entries as needed to equal 100% (**the system does not calculate the total labor distribution**)
- Enter the ORG
- **To remove** an additional entry, check **Remove Entry?**
- Click **Next**



- This section should reflect how much this position will/could cost MSU.
    - **Estimated Annual Salary –** Use targeted maximum salary (i.e. if department is looking to hire in the $50-$60k range, this should reflect $60k)
        - Entering a number here does not mean that the salary is approved by HR. It indicates the maximum salary for which you've identified funding.

- **Estimated Benefits –** Flat health care of $12,648 (if eligible) plus associated taxes. Use linked calculator to determine the cost or contact your Budget Manager. If you have further questions, contact the University Budget Office for guidance.
- **Estimated Total Cost** - Sum of above two lines (salary + benefits)
- **Number of Vacancies –** Default should be "1"
- **Total Funding Required –** Estimated total cost * number of vacancies

- The "WHERE IS THE FUNDING COMING FROM" section should reflect how you have secured budget for the position. Total funds identified should be equal to the "Total Funding Required" field from the prior section; a possible exception to this is when funding via existing positions. In this situation, please contact your Budget Manager or the University Budget Office for guidance.
- You can select one or a combination of sections A through E
  - Please complete all fields in appropriate section(s). Otherwise, form will be returned to you.
- A. Institutional Investment – Complete if funding for this position was approved via the annual reallocation & strategic investment process
- B. Unrestricted Labor Funding – Complete if taking budget from a different position(s) to fund this position
- C. Unrestricted Operations Funding – Complete if taking budget from an operations account to fund this position



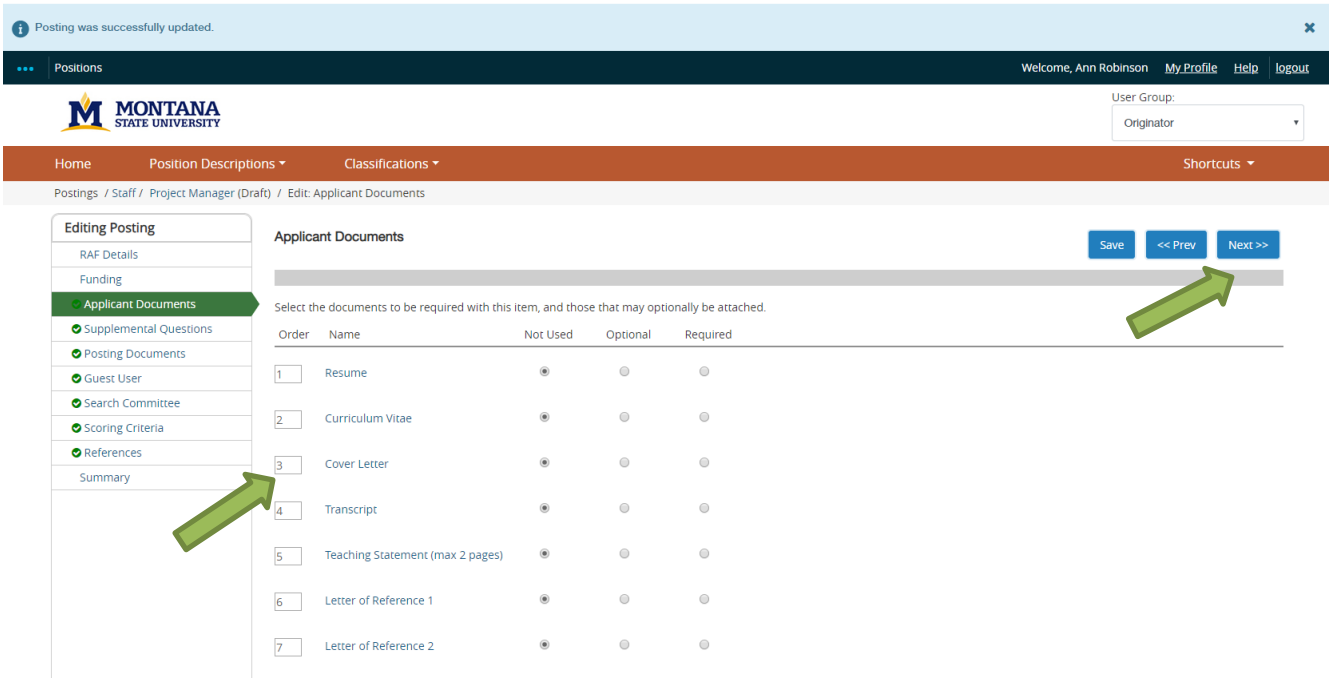
- D. Other Funding – Select any other applicable funding types
- Any comments as needed

If the Departmental Budget authority has not been used previously by your department and would like it to be used, please contact ATShelpdesk to get the appropriate staff assigned to this role. The Departmental Budget Optional workflow state is new, and access will need to be added if your units are interested in using.

- If there are errors on funding section use * in any required funding fields so action can be moved forward. ***These will need to be resolved before position can be posted.***

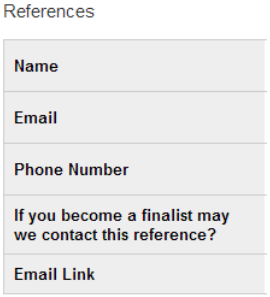
POSTING A STAFF POSITION – APPLICANT DOCUMENTS

- The blue message bar at the top indicates that the posting was successfully updated (saved).



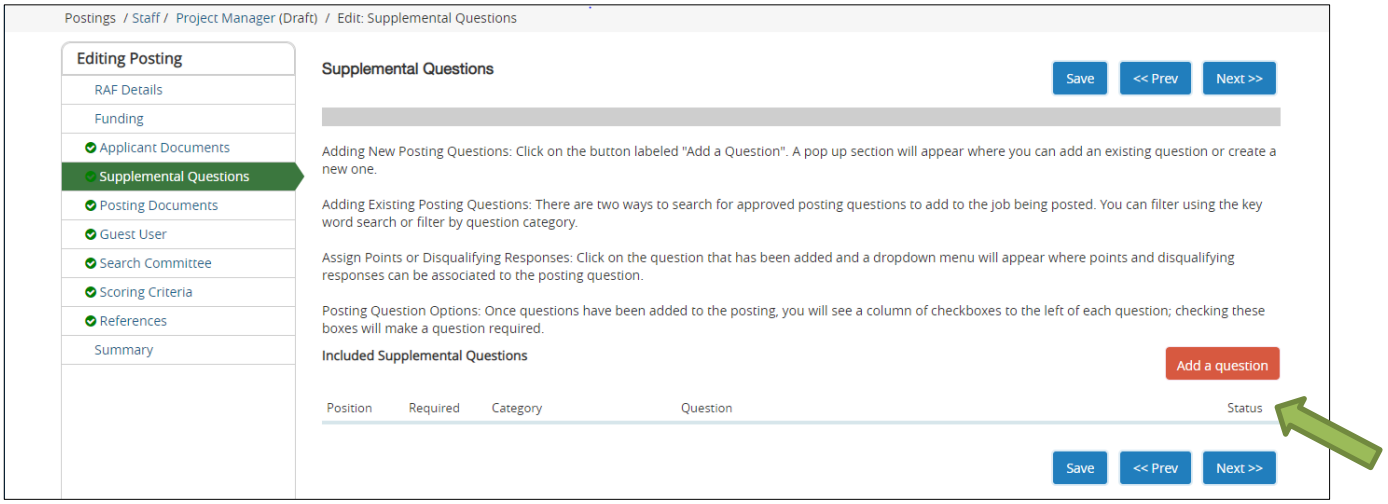
- Indicate what documents the applicant is to include with their application
- Click Not Used, Optional or Required for each document on the list
- Click Save; the documents selected will move to the top and appear in the order you indicated
- Click Next

Note: DO NOT USE "List of References". The applicant portal has a section that requires the applicant to list 3 references. This will be duplication for the applicant.

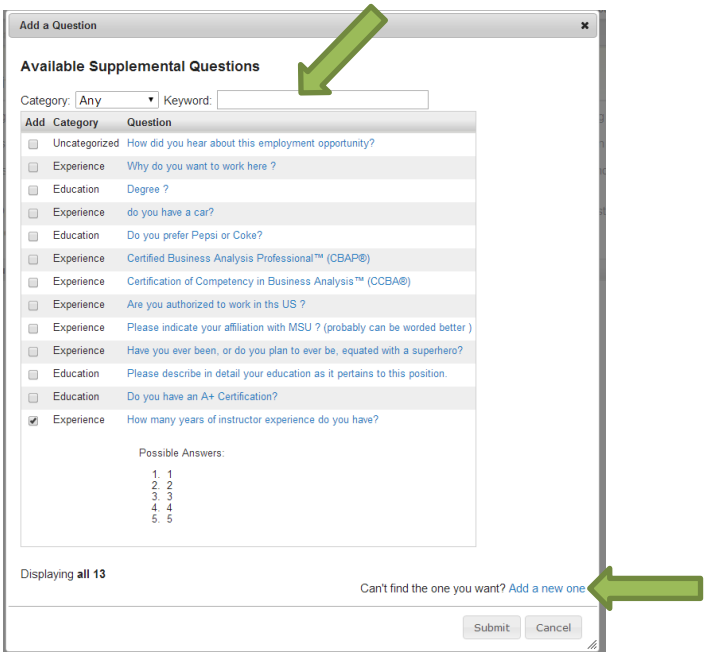


POSTING A STAFF POSITION – SUPPLEMENTAL QUESTIONS

- Supplemental questions are **optional,** but an excellent tool for NTT pools where multiple locations or course interest can be used to sort candidates for screening.

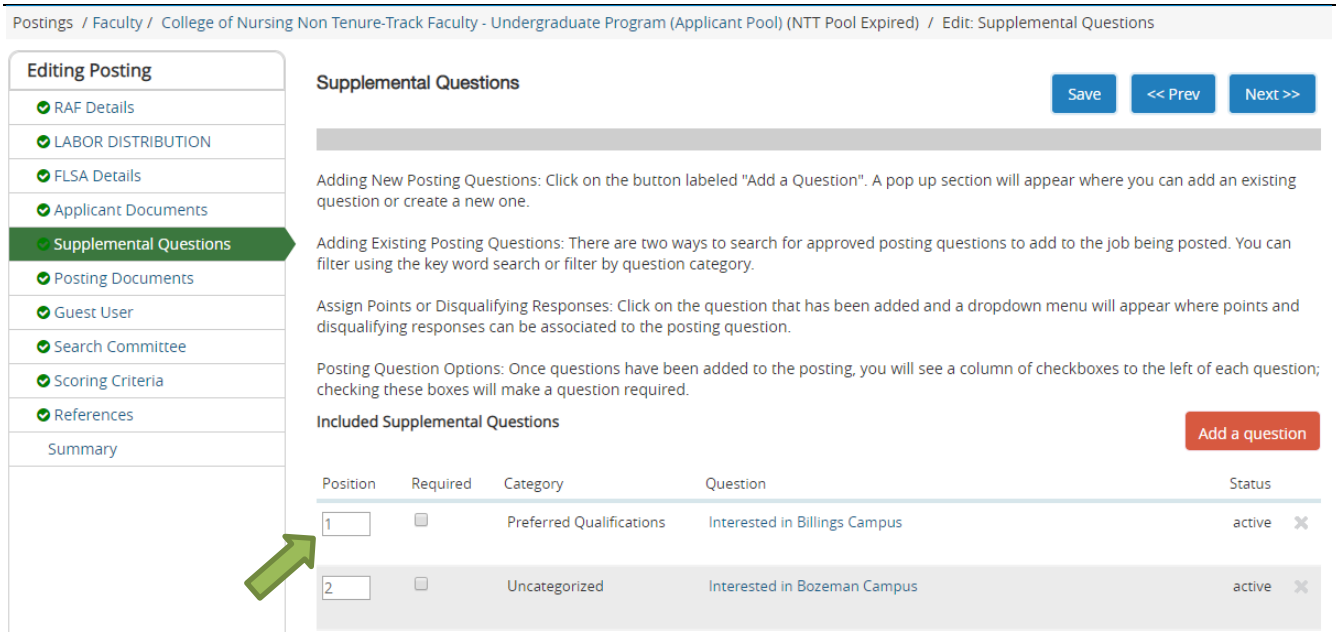


- To add questions from the bank of existing questions, click on the Add a question button
- To search for a specific question, type in a Keyword and click Enter
- The list of questions will be narrowed down to questions that contain the keyword you have searched



- Select the desired question(s) by clicking on the box beside the question (possible answers appear). Select as many questions as wanted
- Click Submit
- Note: if the question desired is not listed, select “Add a new one”. This will submit a request to HR for approval of your question. Please see pages 19 and 20 for examples.

POSTING A STAFF POSITION – SUPPLEMENTAL QUESTIONS (continued)



- Indicate what order the questions are to appear to the candidate by changing the numbers in the boxes under the Position column.
- Click Next

POSTING A STAFF POSITION – SUPPLEMENTAL QUESTIONS (continued)

Posting Specific Questions can be used to replace the **"a letter of application addressing all of the above required and preferred qualifications".** This section allows the applicant to address the required and preferred qualification by simply answering the created questions addressing how they meet each qualification. Posting Specific Questions can be multiple choice (as shown in #1 and #2) or open-ended questions (as shown in #3 and #4). Best practice is the multiple-choice question model.

To create a Posting Specific Question, take the qualification and reword it into a question to the applicant. This creates a user-friendly method for the applicant to address the qualifications while making it easy for the Search Committee Member to evaluate how the applicant meets the qualifications. The applicant can address the qualifications in the system instead of writing a separate letter and having to attach the letter to their application.

Please contact your HR Officer for assistance in building Posting Specific Questions.

Examples of Qualifications and corresponding Posting Specific Questions:

Please note that qualifications may need to be split into several Posting Specific Questions (#1).

Required Qualifications:

1. Bachelor's degree in education, the behavioral or social sciences counseling, business administration or in a related field and minimum of three (3) years of progressively responsible experience and relevant management expertise in administration and human resources or an equivalent combination of relevant education and experience.
   Posting Specific Question: Please indicate your level of education in any of the following - Education, Behavior or Social Sciences Counseling, Business Administration, or a related field.
   - Bachelor's Degree
   - Master's Degree
   - PhD

   Posting Specific Question: Please indicate your level progressively responsible experience and relevant management expertise in administration and human resources or an equivalent combination of relevant education and experience. Note: MSU defines equivalency as two years' experience equates to one year of education.
   - Three to five years' experience
   - Six or more years' experience

2. Demonstrated success in supervising staff utilizing strong leadership, management skills and ability to navigate human resource policies and procedures.
   Posting Specific Question: Please indicate your years of experience with supervising staff utilizing strong leadership, management skills and ability to navigate human resource policies and procedures. Note: MSU defines equivalency as two years' experience equates to one year of education.
   - One to two years' experience
   - Three to five years' experience
   - Six or more years' experience

3. Demonstrated competence in oversight of budgeting/accounting processes as well as interpreting financial information.
   Posting Specific Question: Please demonstrate your competence in the oversight of budgeting/accounting processes as well as interpreting financial information.
   - (Open Ended Question)

POSTING A STAFF POSITION – SUPPLEMENTAL QUESTIONS (continued)

4. Demonstrated experience coordinating and implementing projects, goals, and initiatives.
   Posting Specific Question: Please demonstrate your success with supervising staff utilizing strong leadership, management skills and ability to navigate human resource policies and procedures.
   - (Open Ended Question)

Preferred Qualifications:

1. Master's degree.
2. Successful record of serving students and engaging a diverse population and promoting academic success.
3. Expertise in best-practices and emerging trends in the associated student and student organization arena.
4. Experience with professional organizations like NACA, ACU-I, APAP, NASPA, or ACPA.
5. Possess very good understanding and knowledge of:
   a. MSU organizational structure, policies and procedures.
   b. OCHE and BOR policies and procedures.
   c. Knowledge of a diverse range of business activities, such as budgeting, accounting, staffing and resource management.

   Posting Specific Question: Please address the Preferred Qualifications for this position as it pertains to your experience, education, knowledge and skills.
   - (Open Ended Question)

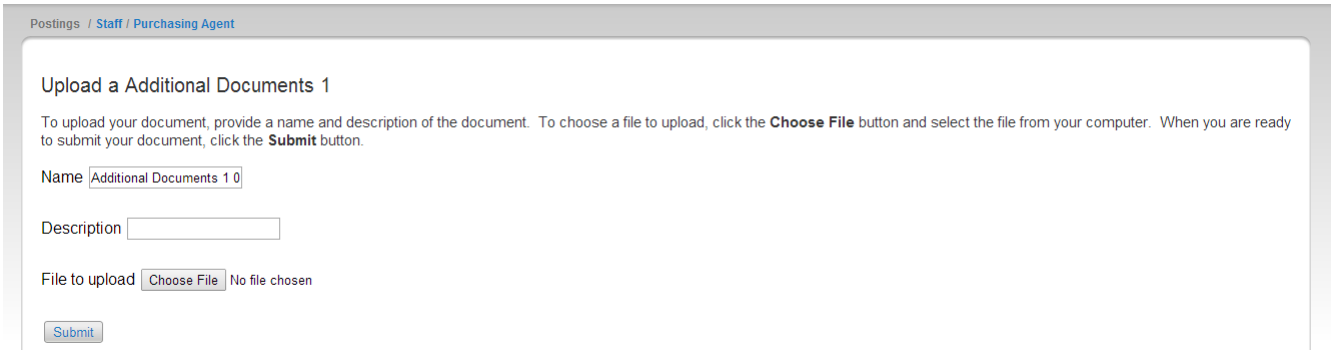
   OR

   Posting Specific Question: Create a Posting Specific Question with either multiple choice or open-ended questions for each Preferred Qualification.

POSTING A STAFF POSITION – POSTING DOCUMENTS (Internal)

- The Posting Documents allows for the ability to attach any documents that are pertinent to this request (ie. – organizational chart, emails, any other documents). The applicant will **NOT** see these documents. Once posted this will need to be done by HR.
- To upload an organizational chart, hover on the down arrow by the word "Actions", select:
  - Upload New
  - Create New
  - Choose Existing

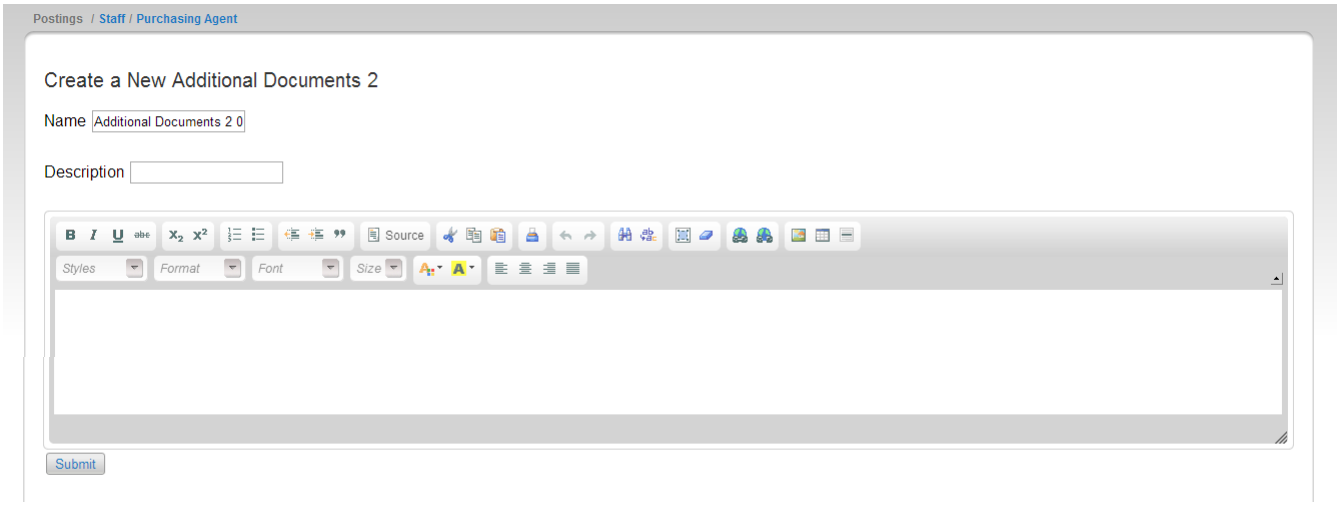
Upload New:



- Name – will pre-populate; you are able to edit
- Description – enter a brief description
- Click on Choose File to upload from your computer
- Click Submit

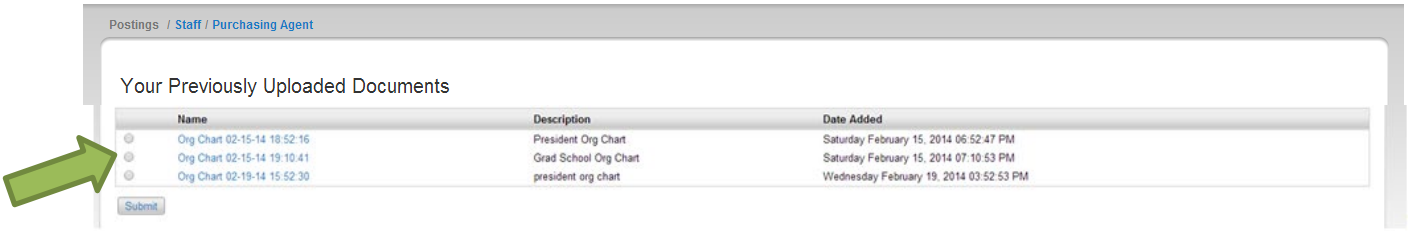
POSTING A STAFF POSITION – POSTING DOCUMENTS (Internal)

Create New:

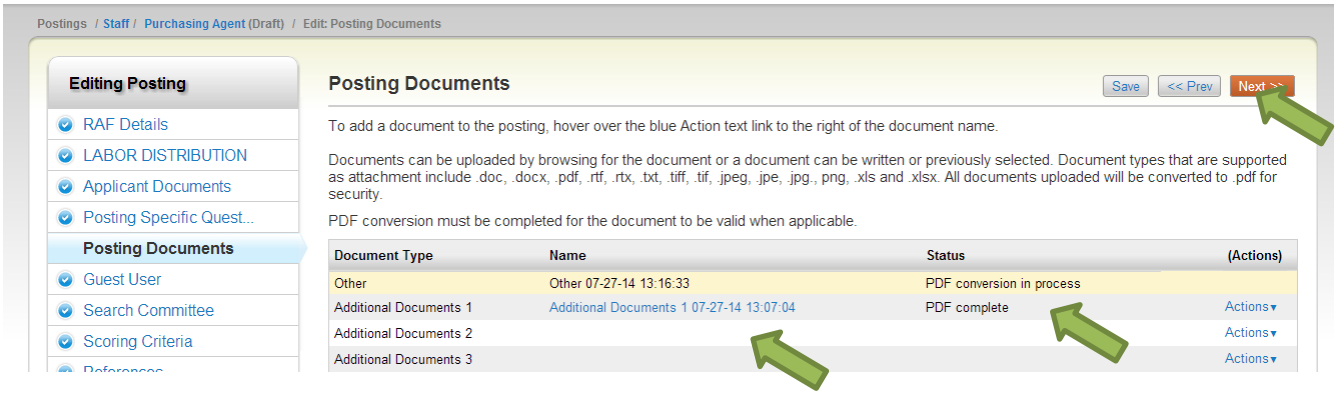


- Name – will pre-populate; you are able to edit
- Description – enter a brief description
- Enter the desired information in the text area
- Click Submit

Choose Existing:

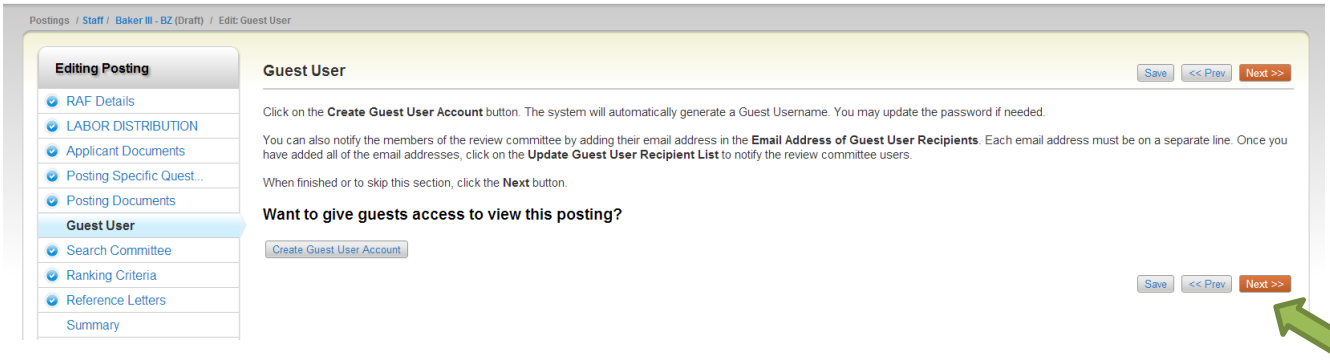


- Select an exisitng document to upload by clicking the cirlce by the document
- Click Submit



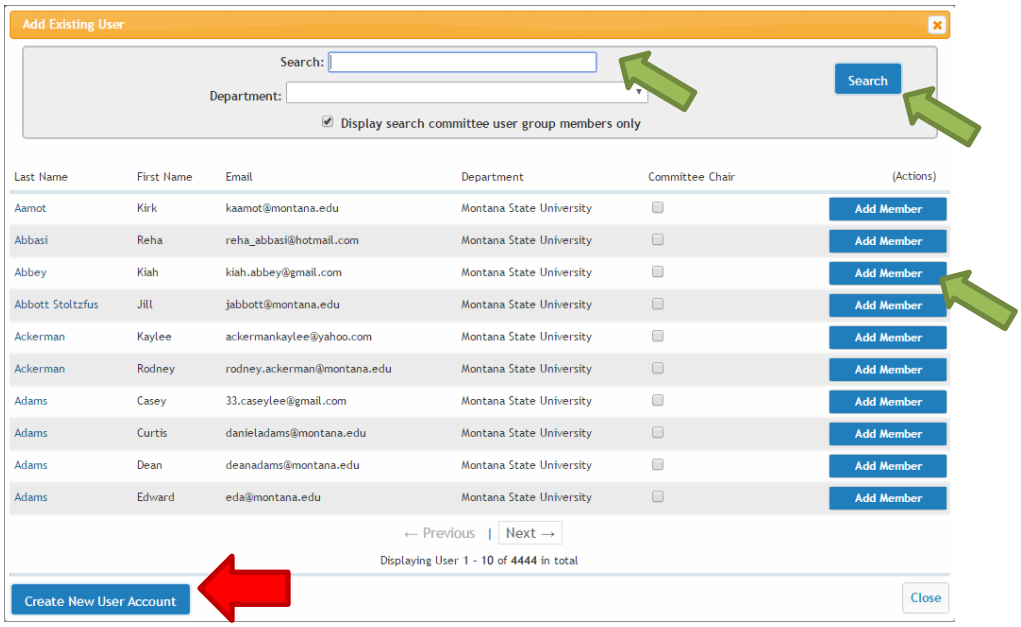
- The document(s) will appear under Name
- The Status column indicates if the PDF conversion was completed
    - Note: if it appears to be taking a while for the conversion, click the “Save” button; the status should then change to PDF complete
- Once all documents have been added, Click Next

POSTING A STAFF POSITION – GUEST USER



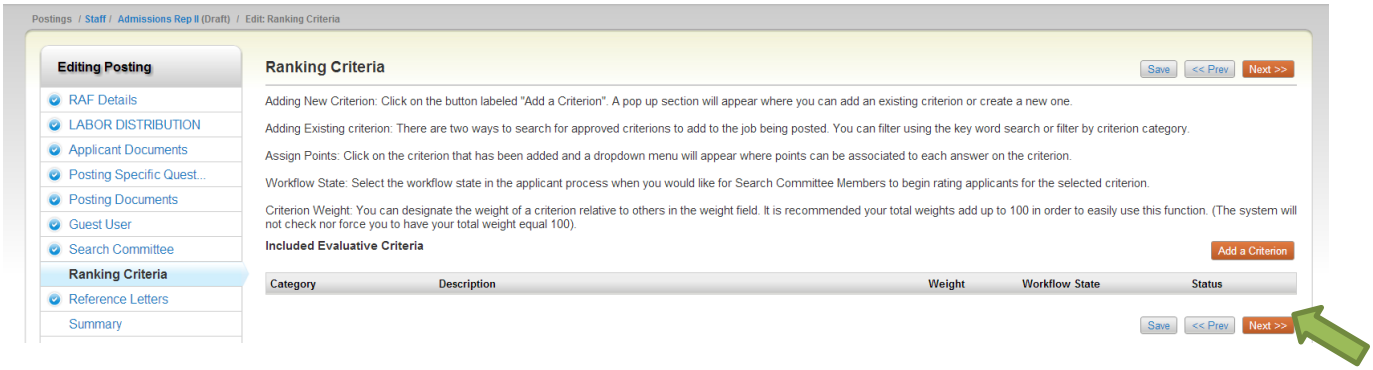
- Guest User is the ability to give someone outside of a search view of the search. This is very helpful when there is a business partner that needs to preview the vacancy before posting or to have another office such as OIE or Legal to have a preview to a vacancy.
- Click Next

POSTING A STAFF POSITION – SEARCH COMMITTEE

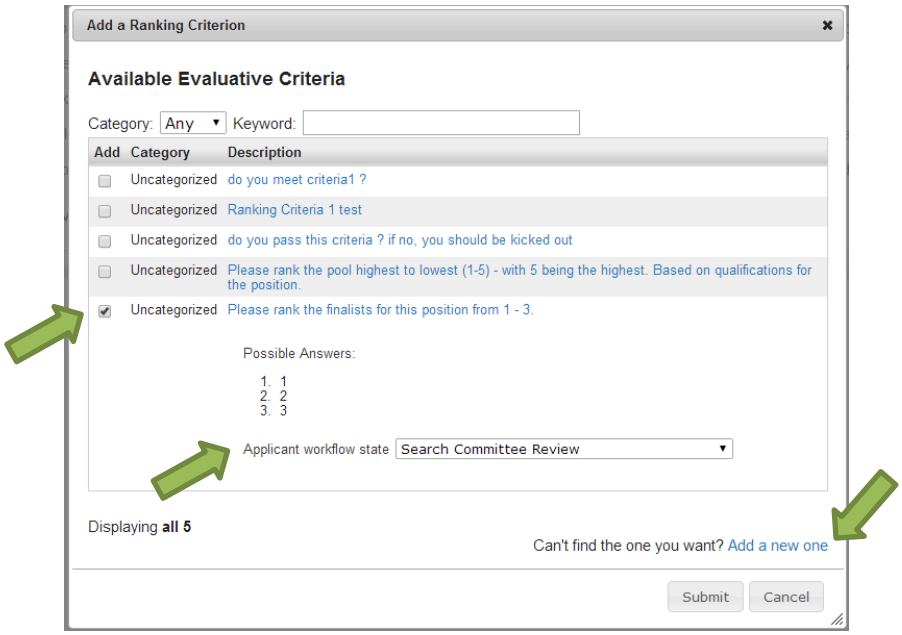


- To select an existing committee member, enter the either the person's first name, last name or email address
- Click Search
- Unsure how to spell someone's name? Leave the fields blank and click Search. A list of search committee members will appear. Click Add Member to select the appropriate committee member.
- If this person is the Search Committee Chair, click the box under "Committee Chair"
- Click Add Member
- Continue enter names until finished building the search committee
- Committee needs minimum of 3 committee members and 1 must be female
- Per OCHE (May 26, 2016 directive) maximum size 7 members, except for Provost/VP/President which 9-12 members may be appropriate and Board of Regents approval.
- ***NOTE: If the employee has not been assigned to the Search Committee Member role, please do NOT utilize the "New Search Committee Member". We have discovered this causes a duplication in the User's if the employee's name does not match the spelling in Banner.***
- Click Next

POSTING A STAFF POSITION – RANKING CRITERIA



- To add a criterion from the bank of existing for ranking the applicants, click on Add a Criterion
- To search for a specific question, type in a Keyword and click Enter
- The list of questions will be narrowed down to questions that contain the keyword you have searched

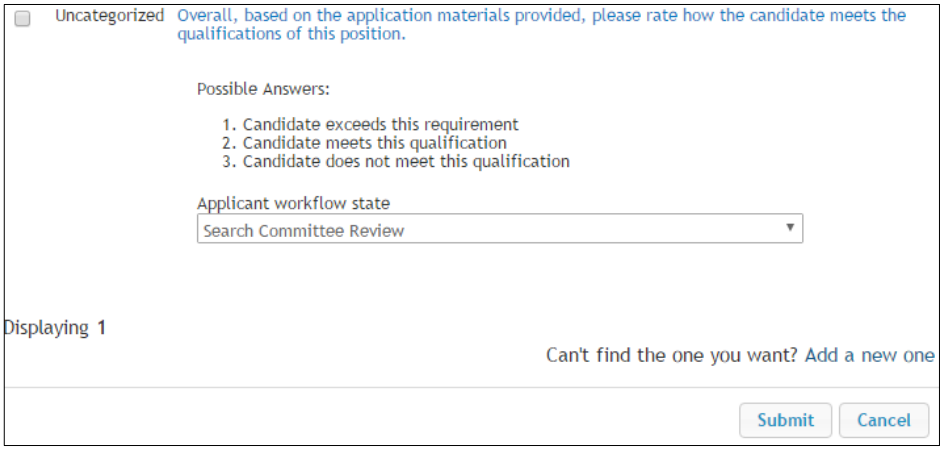


- Select the desired criterion(s) by clicking the box next to the criteria (possible answers will appear). Select as many questions as wanted.
- Indicate at what workflow state the committee will rank the criteria. Note this will always be “Search Committee Review”.
- Click Submit
- Note: if the question desired is not listed, select “Add a new one”. This will submit a request to HR for approval of your question.

POSTING A STAFF POSITION – RANKING CRITERIA (continued)

Ranking Criteria is the new Scoring Matrix that was used by Search Committees to score applicants. This section allows the Search Committee Members to score each applicant in the system.

Tiered Ranking: New option of sorting into groups for Search Committee to discuss based on merits of documents submitted.



To create a Ranking Criteria that takes the qualifications and reword it into a statement that the Search Committee Member answers about the applicant after reviewing the applicant's application materials.

Please contact your HR Officer for assistance in building the Ranking Criteria.

Examples of Qualifications, Posting Specific Questions, and Ranking Criteria:

Please note that qualifications may need to be split into several Ranking Criteria (#1).

Required Qualifications:

1. Bachelor's degree in education, the behavioral or social sciences counseling, business administration or in a related field and minimum of three (3) years of progressively responsible experience and relevant management expertise in administration and human resources or an equivalent combination of relevant education and experience.

   Posting Specific Question: Please indicate your level of education in any of the following - Education, Behavior or Social Sciences Counseling, Business Administration, or a related field.
   - Bachelor's Degree
   - Master's Degree
   - PhD

   Posting Specific Question: Please indicate your level progressively responsible experience and relevant management expertise in administration and human resources or an equivalent combination of relevant education and experience. Note: MSU defines equivalency as two years' experience equates to one year of education.
   - Three to five years' experience
   - Six or more years' experience

POSTING A STAFF POSITION – RANKING CRITERIA (continued)

1. Ranking Criteria: Please indicate how well the candidate meets the qualification of a Bachelor's degree in education, the behavioral or social sciences counseling, business administration or in a related field and minimum of three (3) years of progressively responsible experience and relevant management expertise in administration and human resources or an equivalent combination of relevant education and experience.
    - Candidate exceeds this qualification
    - Candidate strongly meets this qualification
    - Candidate meets this qualification
    - Candidate does not meet this qualification

    Ranking Criteria: Please indicate how well the candidate meets the qualification of a minimum of three (3) years of progressively responsible experience and relevant management expertise in administration and human resources or an equivalent combination of relevant education and experience.
    - Candidate exceeds this qualification)
    - Candidate strongly meets this qualification
    - Candidate meets this qualification
    - Candidate does not meet this qualification

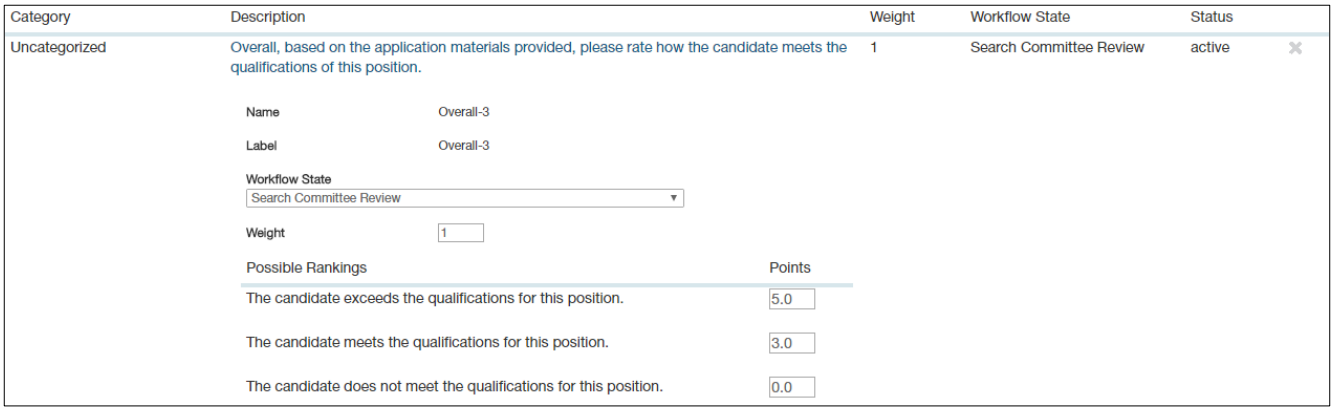
2. Demonstrated success in supervising staff utilizing strong leadership, management skills and ability to navigate human resource policies and procedures.
    Posting Specific Question: Please indicate your years of experience with supervising staff utilizing strong leadership, management skills and ability to navigate human resource policies and procedures. Note: MSU defines equivalency as two years' experience equates to one year of education.
    - One to two years' experience
    - Three to five years' experience
    - Six or more years' experience

    Ranking Criteria: Please indicate how well the candidate meets the qualification of supervising staff utilizing strong leadership, management skills and ability to navigate human resource policies and procedures.
    - Candidate exceeds this qualification
    - Candidate strongly meets this qualification
    - Candidate meets this qualification
    - Candidate does not meet this qualification

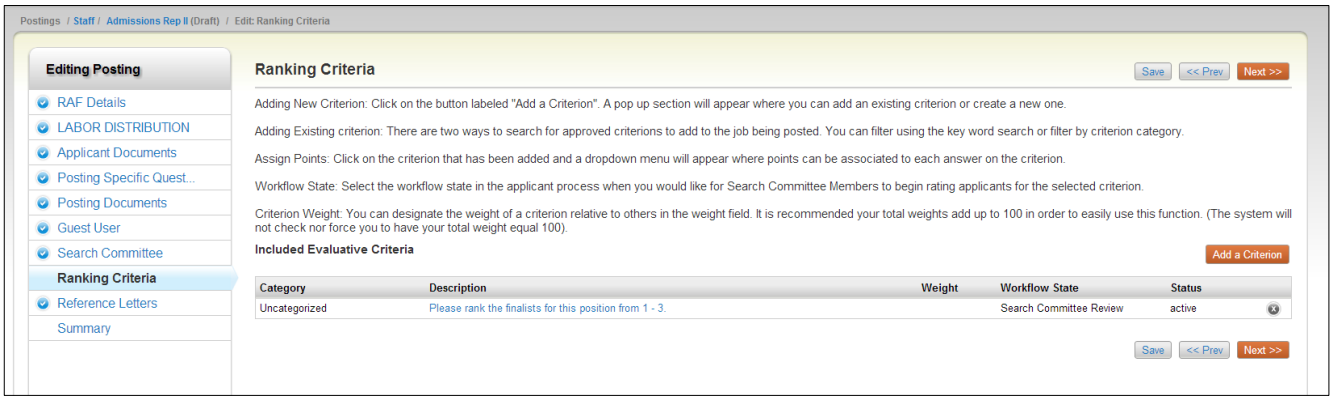
3. Demonstrated competence in oversight of budgeting/accounting processes as well as interpreting financial information.
    Posting Specific Question: Please demonstrate your competence in the oversight of budgeting/accounting processes as well as interpreting financial information.
    - (Open Ended Question)

    Ranking Criteria: Please indicate how well the candidate meets the qualification of competence in oversight of budgeting/accounting processes as well as interpreting financial information.
    - Candidate exceeds this qualification
    - Candidate strongly meets this qualification
    - Candidate meets this qualification
    - Candidate does not meet this qualification

POSTING A STAFF POSITION – RANKING CRITERIA (continued)

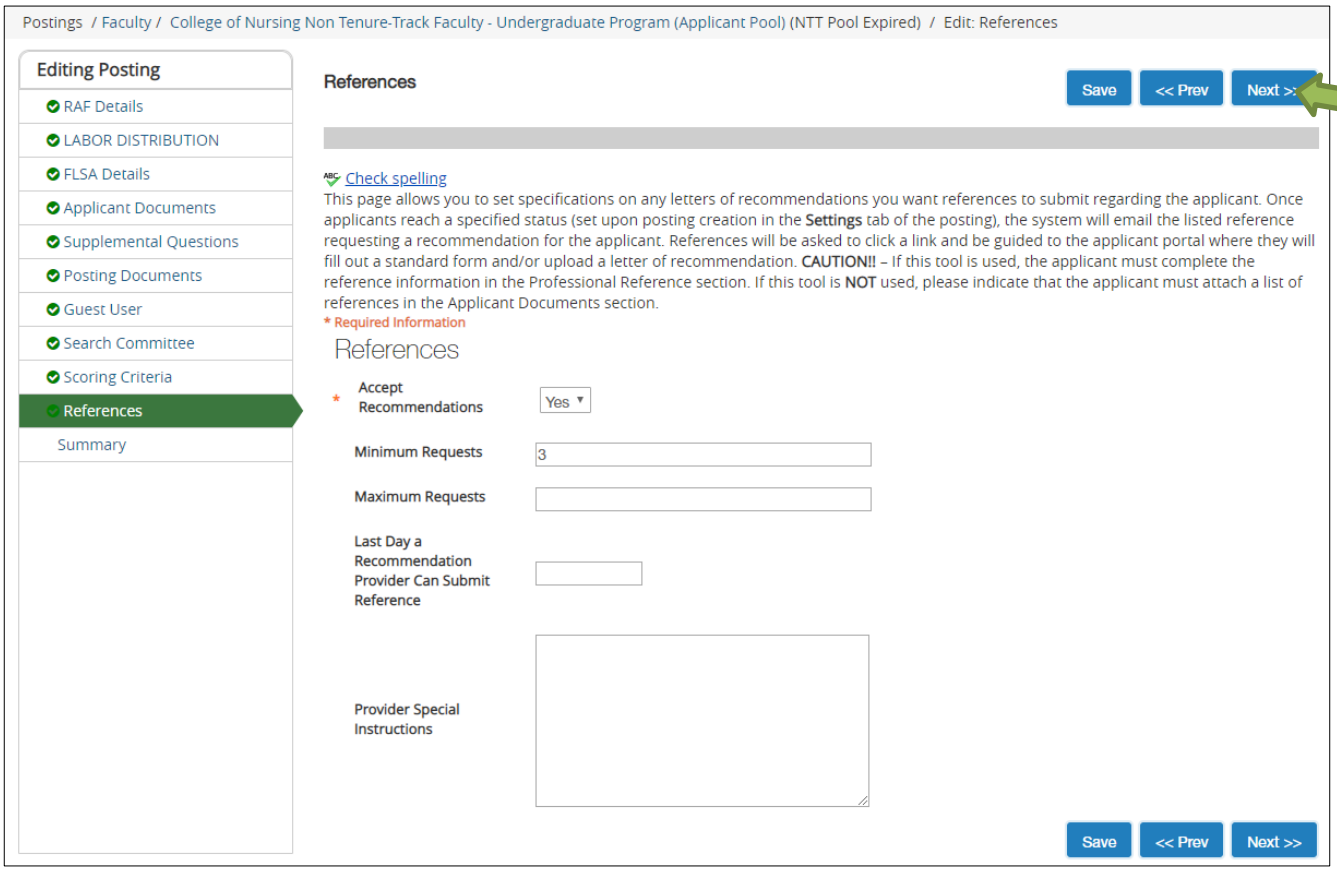


Note: Point values can be assigned at any value as deemed appropriate by the Search Committee.



- Review the list of criteria
- When all the desired criteria are added or waiting to be approved by HR, Click **Next**

POSTING A STAFF POSITION – REFERENCE LETTERS



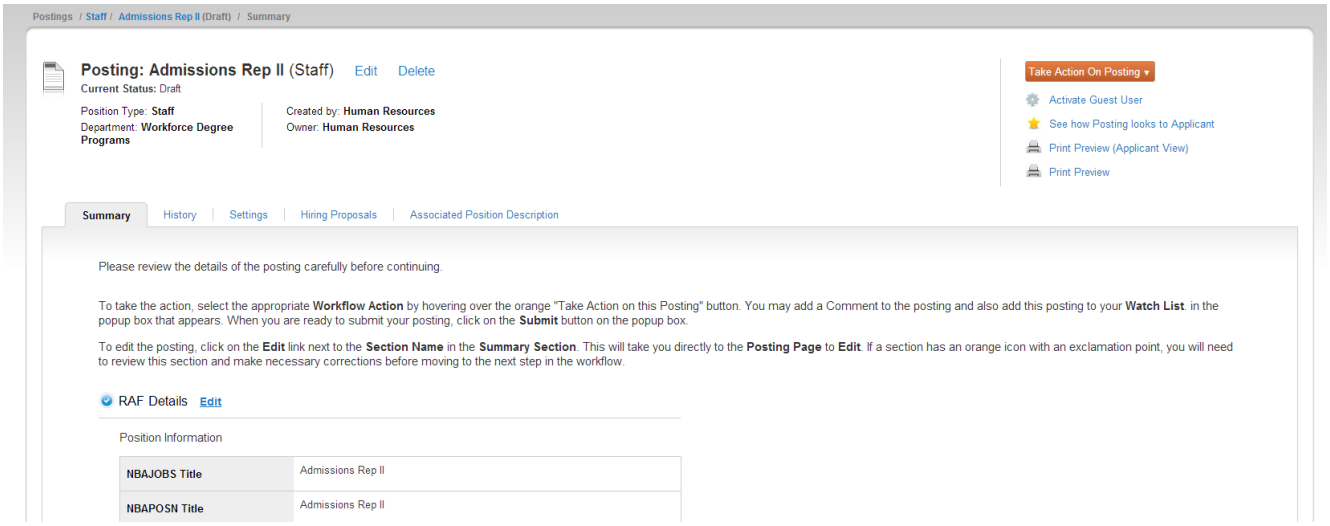
This feature can enable the system to send an email to the applicant's references and require references to be entered into the application. The email states that the person has been identified as a reference for the applicant and requests the reference to answer the reference questions. This tool can be utilized to assist the Search Committee in narrowing down their applicant pool.

Note: Please contact your HR Officer for assistance with the References features.

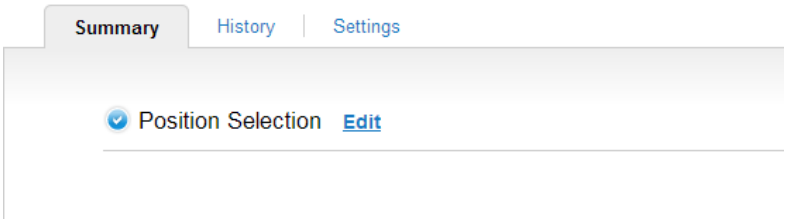
- Indicate if references are accepted by selecting **Yes** (Default is yes to require references to be entered into the applicant portal.
- Enter the minimum number of references the candidate is to submit (Default is 3)
- Enter the maximum number of references the candidate is to submit
- Enter the last date a reference provider can submit a ***Letter of Recommendation (optional)***
- Enter any special instructions to the reference provider
- Click **Next**

Letters of Recommendation DO NOT replace the requirement of calling to verify references.

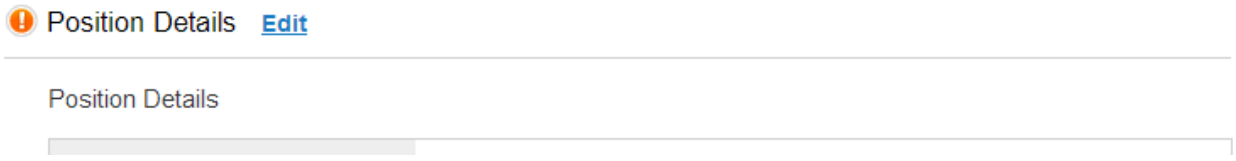
POSTING A STAFF POSITION – SUMMARY



- The Summary allows you to review all of the entered information; you have the ability to edit any section by clicking on the Edit link to any of the sections.
- The blue circle with a check mark indicates the section contains all of the required information.

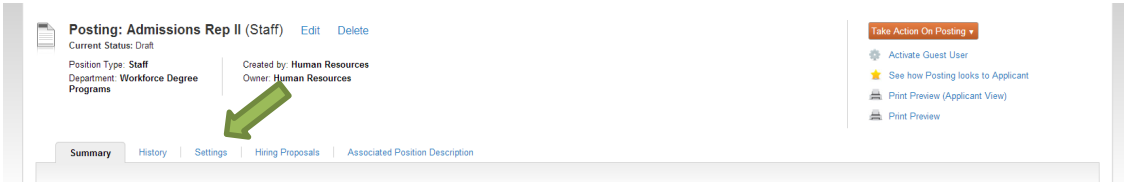


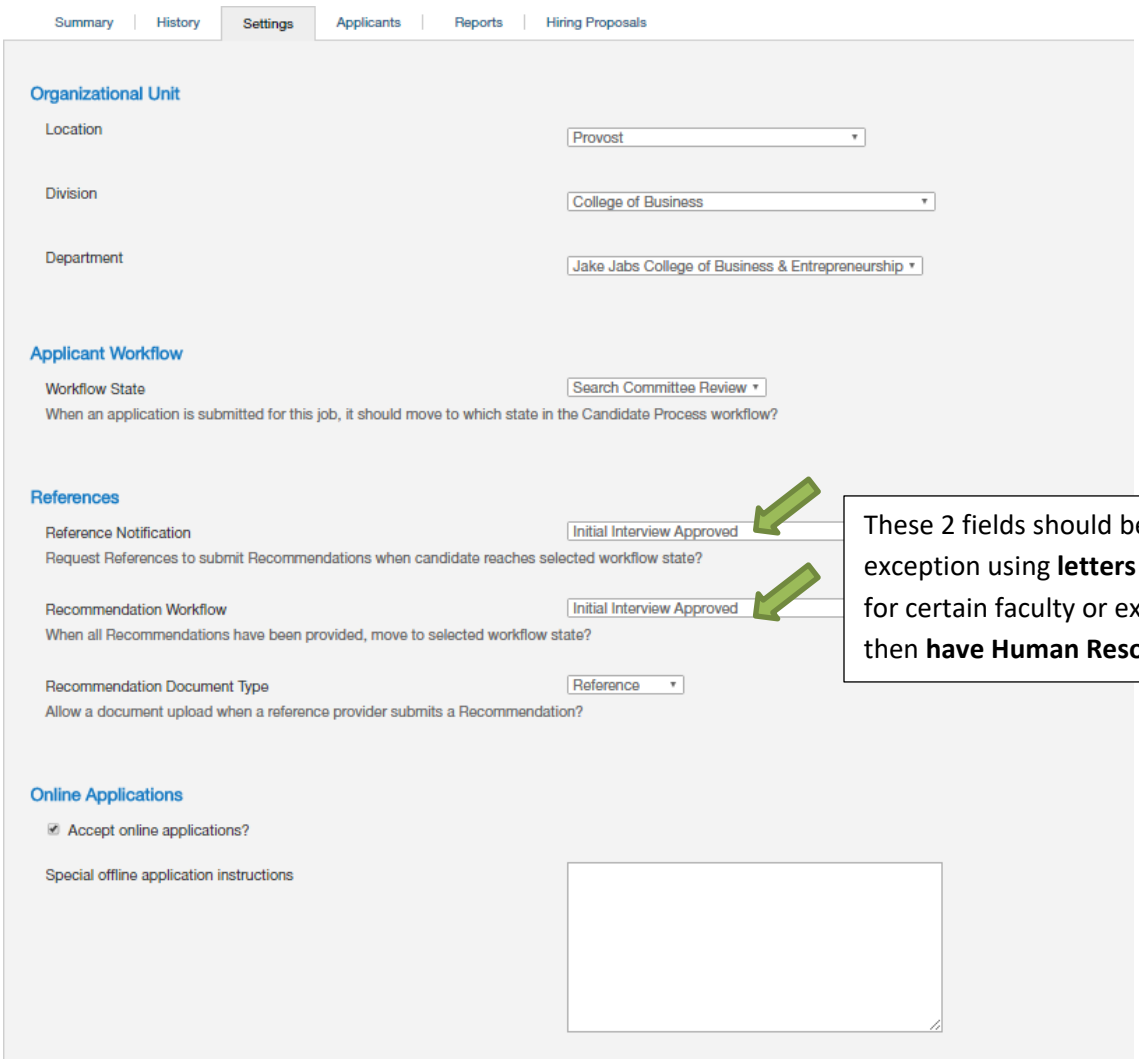
- The orange circle with an exclamation mark indicates additional information is required in that section.
- Click the Edit button to complete the section.



POSTING A STAFF POSITION – SUMMARY (continued)

- If the Location, Division, and/or Department needs to be changed, click on the Settings tab

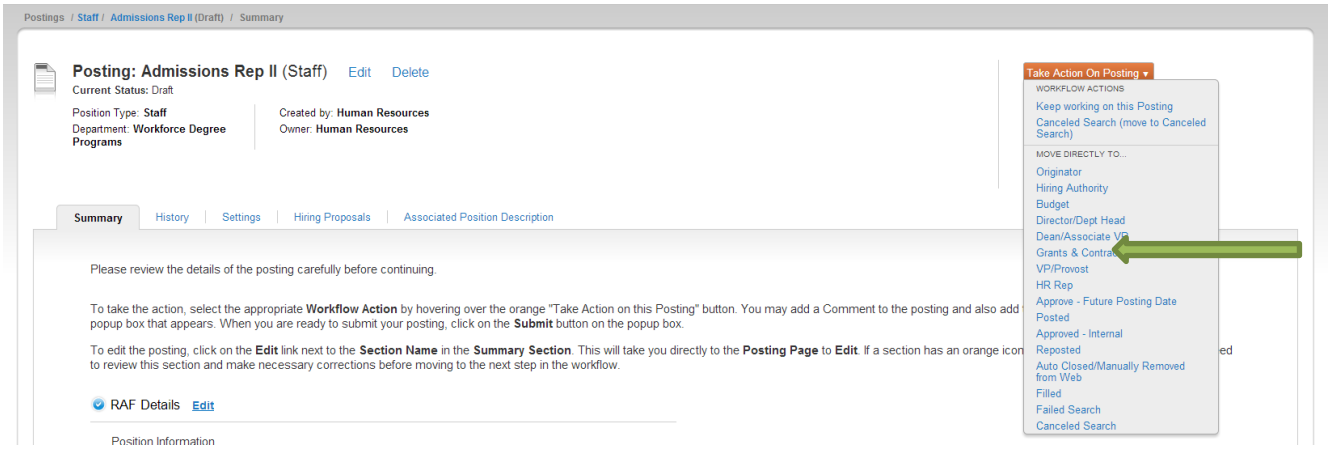




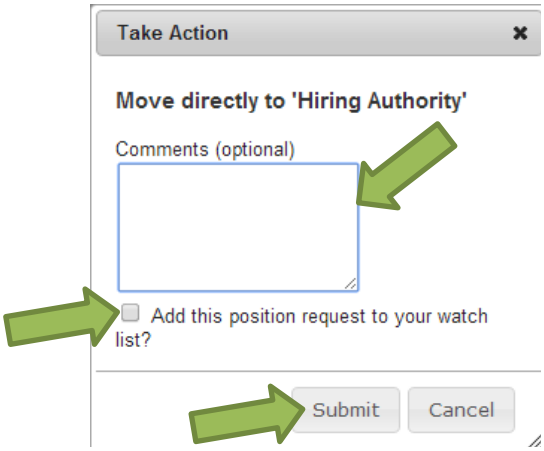
These 2 fields should be blank with the exception using **letters of recommendation** for certain faculty or executive searches, then **have Human Resources set, if needed.**

- Make any necessary changes to the **Location**, **Division**, and/or **Department**
- This tab also allows for changes to be made to Applicant Workflow, References, Online Applications
- Once the changes are made, click **Update Settings**

POSTING A STAFF POSITION – SUMMARY (continued)



- To move to the next step, click on **Take Action on Posting**.
- Select Move Directly to "Hiring Authority" – the request will be moved in the system to the Hiring Authority for review.



- Enter any comments for the **Hiring Authority**
- If you want this item to remain in the **watch list**, click the box
- Click **Submit**
- ***Once the request has been moved to the Hiring Authority, the person who created the request only has the ability to watch the status (creator cannot edit any longer). Once all of the approvals have been completed, the Human Resources will post the position to make it live.***