

## SEARCH COMMITTEE/SEARCH CHAIR GUIDE

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### Role of **Search Committee Member** in ATS:

- View the Posting Summary – this is the vacancy announcement.
- Evaluate Applicants – this provides the ability to review and evaluate (or rank) the applicants.
- Print Preview – provides the ability to view the posting as one document which can be printed.

### Included in this manual are:

- LOGIN INSTRUCTIONS
- SEARCH FOR A POSTING
- VIEW SUMMARY AND APPLICATIONS
- PRINT OR DOWNLOAD APPLICATIONS
- EVALUATE APPLICANTS
- SEARCH CHAIR INSTRUCTIONS

### Role of **Search Committee Chair**:

- Assist the Hiring Authority to determine the members of the Search Committee.
- Serves as the Search Committee spokesperson.
- Discuss the role and scope of the position to foster understanding of the duties and responsibilities.
- Ensure that the Hiring Authority's charge is conveyed to the Search Committee and answers any questions or concerns regarding the charge.
- Ensure Search Committee Members actively participate in the recruitment process and all members have the opportunity to provide feedback and observations.
- Actively participate as a Search Committee Member as well as the Chair.
- Communicate the Search Committee recommendations for advancing applicants to the next phase(s) of the recruitment process to the Hiring Authority. Search Committee recommendations may include the Search Committee's assessments of the finalists' strengths and weaknesses, observations, ranked or unranked list (as determined by the Hiring Authority), etc.
- Consult with the department/college and in a timely manner if/when:
  - The candidate pool surfaces only one qualified candidate;
  - Problems regarding the search process are reported;
  - If the recruitment process may be compromised due to interference, disputes, etc.
  - Other extenuating circumstances warrant intervention.
- Foster compliance with MSU, State, and Federal recruitment and selection policies and procedures.

### Role as a **Search Manager** in ATS:

- Confirming all search committee members have scored the applications
- Seeing the overall score on the applicant page
- Downloading a matrix (optional)

# LOGIN

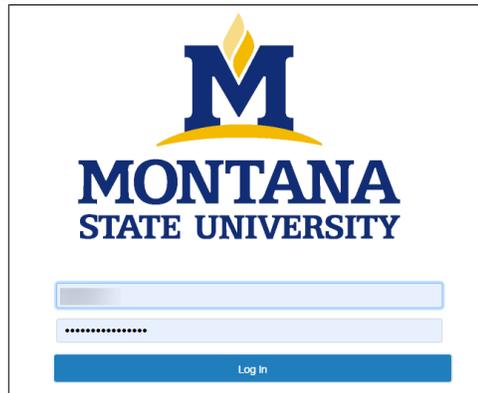
## HR Webpage link to Login Page

➤ <http://www.montana.edu/hr/index.html>



## 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 platform works best with Chrome, Firefox, or Safari (5 or higher).  
*It is recommended that you utilize one of these Internet Options.*

**Inactivity of 60 minutes will time out the system and any unsaved data will be lost.**

**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.**

# SEARCHING FOR A POSTING

- Current role will be listed under **User Group** on the right-hand side.
- Any action that you are assigned to should show up in your Inbox under the correct action Tab
  - Example: are we looking for a **Posting, Position Requests, Hiring Proposals?**
  - The blue text will open the action referred to.
  - Selecting through the **Inbox** will automatically change to the role needed to complete the assigned action.
  - If you have multiple roles use **User Group** drop-down to manually select a role.
- To search for older searches or a missing search select **Postings** drop-down then select **Staff** or **Faculty**

### Staff Postings

Saved Searches ▾  Search [Q More Search Options ▾](#)

- Enter position title, vacancy number, or keyword in **Search** field (i.e. Program Coordinator or 16279 or 16279) *Do not use “-” (dashes) the system will generate an error.*
- Select the appropriate position
- Click on the **Actions** drop-down
- Select **Watch** to add to your watch list on your home page or **Stop Watching** to remove.
- Select **View Posting** or **View Applicants**
- **OR** the **Working Title** is a hyperlink and will bring up the vacancy announcement.

## VIEW SUMMARY AND APPLICATIONS

- The **Summary** is your job posting view (or vacancy announcement) and can be referred to at any time in the process.
- To view the applications, click on the **Applicants** tab.
- **Anywhere that has a blue text is a hyperlink**
- Options: open summary on one of two screens, print out posting, or use hyperlink to go back and forth to assist with ranking applicants.

The screenshot shows the user interface for viewing a job posting. At the top, there is a navigation bar with 'Hire', 'Welcome', 'My Profile', 'Help', and 'logout'. Below this is the Montana State University logo and a search bar for 'Search Committee Member'. The main navigation bar includes 'Home', 'Postings', and 'Shortcuts'. The breadcrumb trail reads 'Postings / Staff / Human Resource Programmer (Removed from Web) / Summary'. On the right, it says 'Search Results: Previous | Next'.

The main content area is titled 'Posting: Human Resource Programmer (Staff)'. It shows 'Current Status: Removed from Web', 'Position Type: Staff', and 'Department: Training (Training)'. It also lists 'Created by: Tricia Wimbish' and 'Owner: Search Manager'. A green arrow points to the 'Applicants' tab. On the right, there are action buttons: 'See how Posting looks to Applicant', 'Print Preview (Applicant View)', 'Print Preview', and 'Add to Watch List'. Red arrows point from the 'Print Preview (Applicant View)' and 'Print Preview' buttons to the right.

Below the tabs, there is a message: 'Please review the details of the posting carefully before continuing.' This is followed by instructions on how to take action, add to a watch list, and edit the posting. A green checkmark icon is next to 'RAF Details'.

Position Information	
Announcement Number	STAFF - VA - 15248
Quick Link for Internal Postings	<a href="http://jobs.montana.edu/postings/1880">http://jobs.montana.edu/postings/1880</a>
For questions regarding this position, please contact:	John Doe at 406-994-XXXX or john.doe@montana.edu

**NOTE for the following instructions when viewing more than 30 applicants:**

**Applicants are listed on the Applicant page. If more than 30 there will be several pages. The instructions below will need to be followed for EACH page. For example, once done downloading applications or evaluating the first 30 applicants, the same process will need to be followed for each page of applicants.**

# REVIEW APPLICATIONS/DOCUMENTS ONLINE

Postings / ... / Human Resource Programmer (Posted) / Applicant Review / Jane Murphy Search Committee Review Search Results: Previous | Next

**Job application: Jane Murphy (Staff)**  
 Current Status: Search Committee Review  
 Application form: Staff Application

Full name: Jane Murphy  
 Address: 3587 Highway 4, BILLINGS, MT 59701, United States of America  
 Username: janemurphy  
 Email: emailaddress@zed.zed  
 Phone (Primary): 555-555-5555  
 Position Type: Staff  
 Department: Human Resources Compliance & EEO (Human Resources Compliance & EEO)

Created by: Jane Murphy  
 Owner: Search Manager

Take Action On Job Application ▼  
 ★ View Posting Applied To  
 ★ Preview Application  
 ★ Evaluate Applicant

Documents can be viewed online on the documents tab at the top or at the bottom

Summary | Documents | Recommendations (0 of 0) | History | Reports

Personal Information [Edit](#)

Document Type	Name	Conversion Status
Cover Letter	Cover Letter 03-03-15 17:27:41 (30.4 KB)	PDF complete
Resume	Resume 03-18-15 15:04:47 (48.7 KB)	PDF complete

- Summary tab is the complete application as submitted in the system
- Documents tab is any required or optional documents assigned in the posting can be viewed for this application that can be viewed in the online PDF viewer also linked at the bottom of the application

Postings / ... / Human Resource Programmer (Posted) / Applicant Review / Jane Murphy Search Committee Review Search Results: Previous | Next

**Job application: Jane Murphy**  
 Current Status: Search Committee Review  
 Application form: Staff Application

Full name: Jane Murphy  
 Address: 3587 Highway 4, BILLINGS, MT 59701, United States of America  
 Username: janemurphy  
 Email: emailaddress@zed.zed  
 Phone (Primary): 555-555-5555  
 Position Type: Staff  
 Department: Human Resources Compliance & EEO (Human Resources Compliance & EEO)

Created by: Jane Murphy  
 Owner: Search Manager

**Evaluative Criteria**  
 Jane Murphy  
 assessment\*: Overall, based on the application materials provided, please rate how the candidate meets the qualifications of this position.  
 Overall: 0  
 Please select  
 Comments

Save Save and Next Cancel

Take Action On Job Application ▼  
 ★ View Posting Applied To  
 ★ Preview Application  
 ★ Evaluate Applicant  
 Edit Application  
 Reactivate

Summary | Documents | Recommendations (0 of 0) | History | Reports

- When ready to evaluate click Evaluate Applicant that will open a floating window
- The floating window will scroll up and down the applicant page while you are viewing
- Not available on the Document page, will need to go back to **Summary** to open
- Hit Cancel if you need to switch screens, once you return just click again to open
- **Save and Next** to proceed to next candidate in the list or just **Save** to end

## PRINT OR DOWNLOAD APPLICATIONS-Optional

From **Applicants tab**, click the **Actions** button to view options

- Under Bulk:
  - All Applications (including uploaded materials) can be downloaded in a single PDF file **OR**
  - An individual PDF document of each applicant can be created and viewed
  - The PDF's can then be printed, **if necessary**
  - **NOTE: if the applications are printed, they MUST be shredded when the search is completed. Also, PDF's must be deleted from desktop and from Recycle Bin at the end of the search.**

The screenshot shows the 'Applicants' tab for a 'Posting: Human Resource Programmer (Staff)'. The interface includes a search bar, a table of applicants, and an 'Actions' dropdown menu. A green arrow points to the 'Applicants' tab, and another green arrow points to the 'Download Applications as PDF' option in the 'Bulk' section of the 'Actions' menu.

	Legal Last Name	Legal First Name	Workflow State (Internal)	Application Date	State-Vet Pref	Vet Pref	Scoring Criterion Score
<input checked="" type="checkbox"/>	Moore	Carol	Search Committee Review	April 07, 2015 at 04:10 PM			75.00
<input checked="" type="checkbox"/>	Savage	Samantha	Search Committee Review	April 07, 2015 at 04:19 PM			100.00
<input checked="" type="checkbox"/>	Murphy	Jane	Search Committee Review	April 07, 2015 at 04:22 PM			0.00
<input checked="" type="checkbox"/>	Wise	Kate	Search Committee Review	April 07, 2015 at 04:23 PM			50.00

### Printing all applications (and uploaded materials) into one document

- Click on **Applicant** tab
- Click on box beside **“Legal Last Name”** to select all applications
  - NOTE: If one application is needed, or just a few, click only on those box(es) needed.
- Click on **Action** button to the right of the screen
- Click on **Download Applications as PDF** under the **Bulk** section

✕

**Select the document type(s) to use.**

Application and All Documents

Only These Document Types

- Application Data
- Resume
- Cover Letter
- Online Portfolio - URL

- The complete application (and uploaded documents) or parts of the application, can be downloaded
- Click **Submit** (for large pools this may take a while to generate the document).

### Download one application to a single PDF:

My View

Search Committee View ✕

"Search Committee View" 4 Selected records 0 ✕ Clear selection?

Actions ▾

	Legal Last Name	Legal-First Name	Workflow State (Internal)	Application Date	State-Vet Pref	Vet Pref	Scoring Criterion Score	Scoring Criterion Status	
<input type="checkbox"/>	Moore	Carol	Search Committee Review	April 07, 2015 at 04:10 PM			75.00	Evaluate Applicant	Actions ▾
<input type="checkbox"/>	Savage	Samantha	Search Committee Review	April 07, 2015 at 04:19 PM			100.00	Evaluate Applicant	Actions ▾
<input type="checkbox"/>	Murphy	Jane	Search Committee Review	April 07, 2015 at 04:22 PM			0.00	Evaluate Applicant	Actions ▾
<input type="checkbox"/>	Wise	Kate	Search Committee Review	April 07, 2015 at 04:23 PM			50.00	Evaluate Applicant	Actions ▾

- Select the **name** of the candidate you wish to download.

**Job application: Carol Moore (Staff)**

**Current Status:** Search Committee Review  
**Application form:** Staff Application

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Full name: Carol Moore  
Address:  
125 Skyline Road  
Bozeman, MT 59718  
United States of America

Username: carolmoore  
Email: carolmoore@gmail.com  
Phone (Primary): 555-555-5555  
Phone (Secondary):  
Position Type: Staff  
Department: Human Resources Compliance & EEO (Human Resources Compliance & EEO)

Created by: Carol Moore  
Owner: Search Manager

- ★ View Posting Applied To
- ★ Preview Application
- ★ Evaluate Applicant

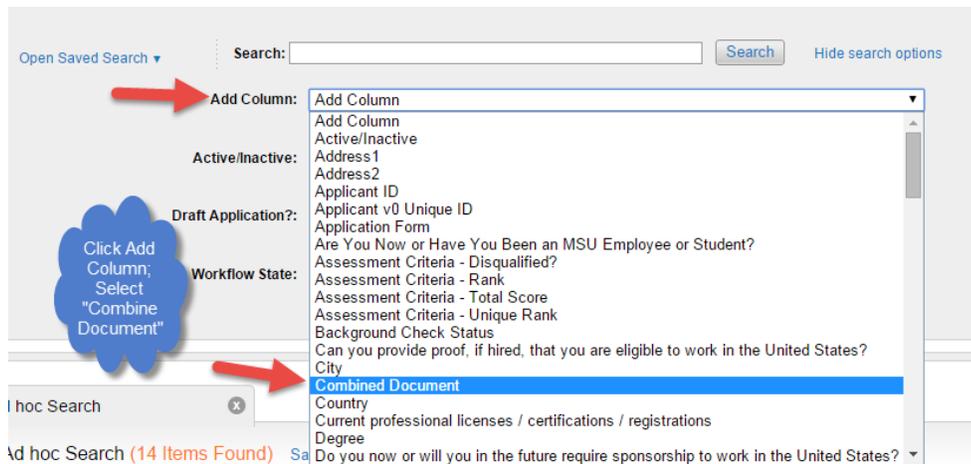
Summary
Documents
Recommendations (0 of 3)
History

This will bring up the system view of the application

PDF Documents	
Document Type	Actions
Application	View
Combined Document	Generate

At the bottom of the screen you have the option to **View** the application as PDF or Combine Documents and **generate** a single PDF of their application/resume/cover letter/letters of recommendation (if requested).

**OR**



➤ Select **More Search Options**, then **Add Column** and select **Combined Document**.

Ad hoc Search								
Ad hoc Search 5 Save this search? Selected records 0 Clear selection? Actions								
	Legal Last Name	Legal First Name	Workflow State (Internal)	Application Date	State-Vet Pref	Vet Pref	Scoring Criterion Status	Combined Document
<input type="checkbox"/>	Moore	Carol	Search Committee Review	April 07, 2015 at 04:10 PM			Evaluate Applicant	Generate Actions

➤ Click on **Generate (FOR JUST ONE)**

**OR**

Ad hoc Search ×

Ad hoc Search 5 Save this search? Selected records 5 × Clear selection? Actions ▼

<input checked="" type="checkbox"/>	Legal Last Name	Legal First Name	Workflow State (Internal)	Application Date	State-Vet Pref	Vet Pref	Scoring Criterion Status
<input checked="" type="checkbox"/>	Moore	Carol	Search Committee Review	April 07, 2015 at 04:10 PM			Evaluate Applicant
<input checked="" type="checkbox"/>	Savage	Samantha	Search Committee Review	April 07, 2015 at 04:19 PM			Evaluate Applicant
<input checked="" type="checkbox"/>	Murphy	Jane	Search Committee Review	April 07, 2015 at 04:22 PM			Evaluate Applicant
<input checked="" type="checkbox"/>	Wise	Kate	Search Committee Review	April 07, 2015 at 04:23 PM			Evaluate Applicant
<input checked="" type="checkbox"/>	Moose	Mortimer	Search Committee Review	April 12, 2019 at 03:50 PM		I am not a protected veteran.	Evaluate Applicant

GENERAL

- Evaluate Applicants
- Download Applicants Evaluations
- Review Screening Question Answers
- Download Screening Question Answers
- Export results

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BULK

- Download Applications as PDF
- Create Document PDF per Applicant



- Select check box for **Legal Last Name** to select all
- Click on **Create Document PDF Per Applicant** this combine

<input type="checkbox"/>	Legal Last Name	Legal First Name	Workflow State (Internal)	Application Date	State-Vet Pref	Vet Pref	Scoring Criterion Status	Combined Document
<input type="checkbox"/>	Moore	Carol	Search Committee Review	April 07, 2015 at 04:10 PM			Evaluate Applicant	View <span>Actions</span> <span>▼</span>

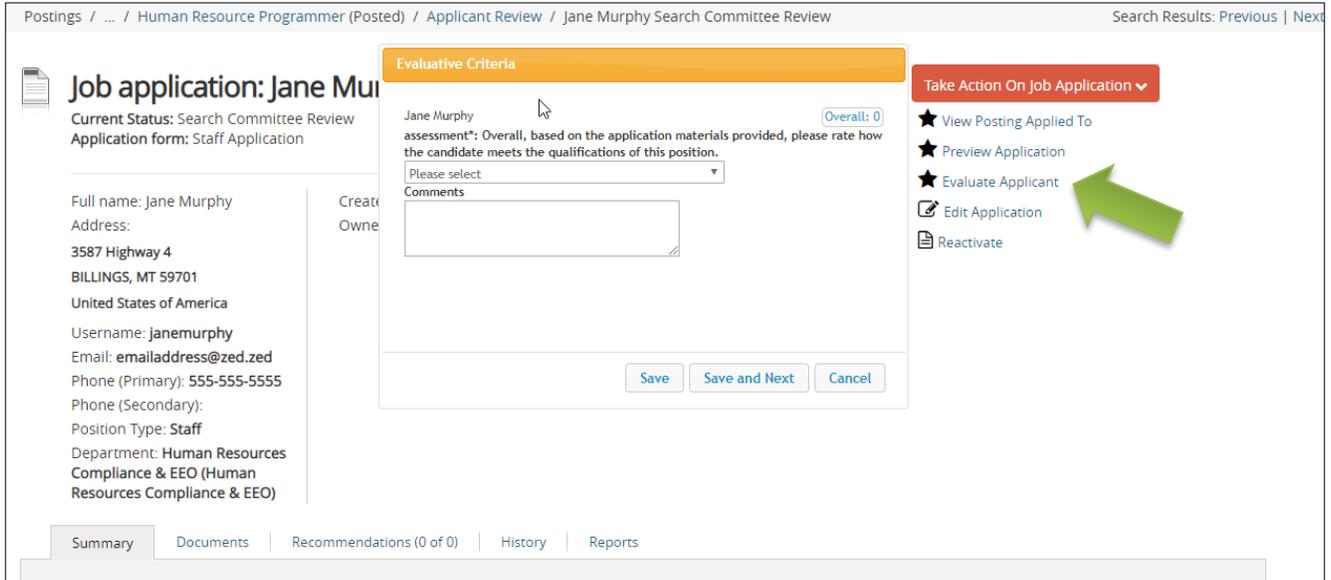


- Once conversion is done click on **View**
- Then can be printed off as individual PDF's

***NOTE: if the applications are printed, they MUST be shredded when the search is completed. Also, PDF's must be deleted from desktop and from Recycle Bin at the end of the search.***

# EVALUATE APPLICANTS

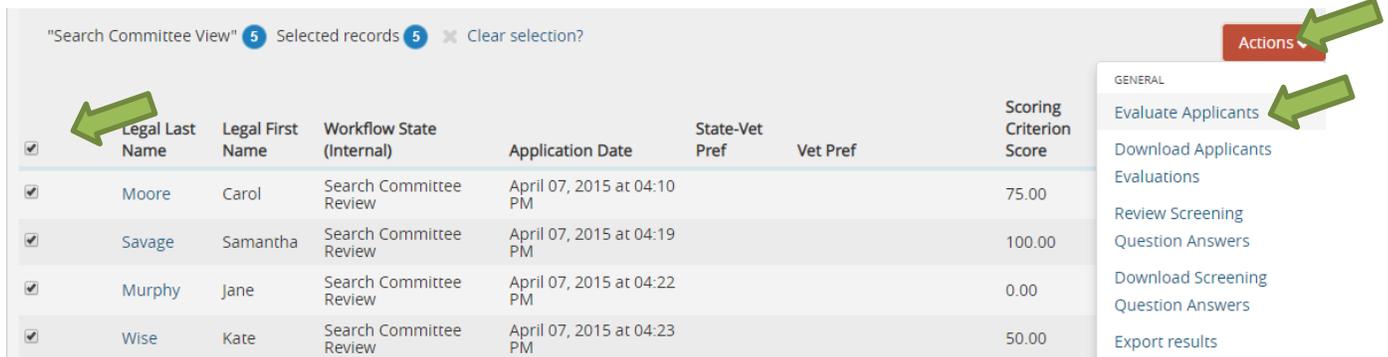
## Ranking while reviewing online:



- When ready to evaluate click Evaluate Applicant that will open a floating window
- The floating window will scroll up and down the applicant page while you are viewing
- Not available on the Document page, will need to go back to **Summary** to open
- Hit Cancel if you need to switch screens, once you return just click again to open
- **Save and Next** to proceed to next candidate in the list or just **Save** to end

**OR**

## Ranking after/when reviewing PDF:



- Check mark selection box of applicant (or complete list by clicking box beside "Legal Last Name")
- Click on **Actions**
- Select **Evaluate Applicants** from dropdown.

Home Postings ▾ Shortcuts ▾

Postings / ... / Human Resource Programmer (Posted) / Applicant Review / Enter Scoring Criteria Evaluations

Scoring Criteria

Search Committee Review

Workflow State: Search Committee Review Save Next >>

Showing 5 Applicants. Show More

Evaluations

Carol Moore  
 assessment\*: Overall, based on the application materials provided, please rate how the candidate meets the qualifications of this position.  
 Please select   
 Please select  
 Candidate exceeds the qualifications – 4 points  
 Candidate strongly meets the qualifications – 3 points  
 Candidate meets the qualifications – 2 points  
 Candidate does not meet the qualifications - 0 points

Samantha Savage  
 assessment\*: Overall, based on the application materials provided, please rate how the candidate meets the qualifications of this position.  
 Please select  
 Comments

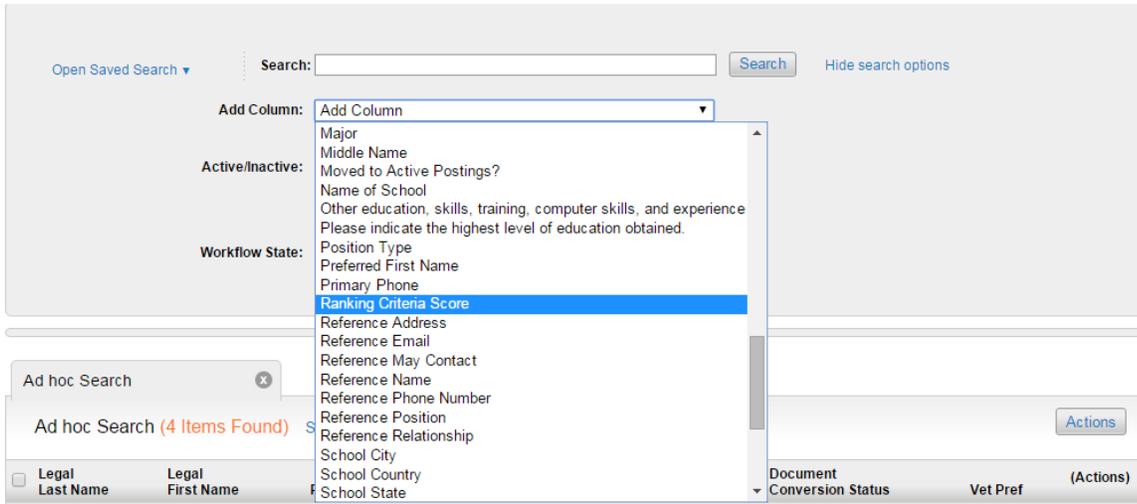
Jane Murphy  
 assessment\*: Overall, based on the application materials provided, please rate how the candidate meets the qualifications of this position.  
 Please select  
 Comments

- This screen indicates applicants that are ready for evaluation.
- For each criterion, click the drop-down arrow and select the appropriate option for that applicant.
- Enter any **Comments** you have regarding this applicant’s qualifications (these need to be job related).
- **Repeat** for each applicant.
- To finish evaluating applicants at a *later time*, click **Save** and **log out**.
- Once **all** the applicants have been evaluated, click **Next**.

# SEARCH CHAIR INSTRUCTIONS

The **Search Chair (may need to use Search Manager role)** can view the scores given the applicants.

- In the **Applicants Tab** click on **More Search Options** by using dropdown box
- **Add Column** box, click on **Ranking Criteria Score**
  - A column can be added for any information needed about the applicants with the option to export these results to a spreadsheet using the **Action** button.



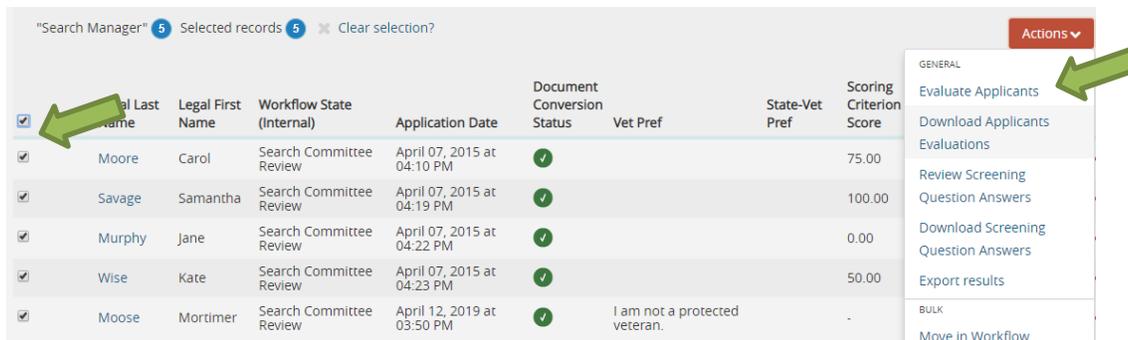
- Overall score will appear in the column

Ad hoc Search (4 Items Found) [Save this search?](#) [Actions](#)

<input type="checkbox"/>	Legal Last Name	Legal First Name	Posting Number	Workflow State (Internal)	Application Date	Document Conversion Status	Vet Pref	Ranking Criteria Score	(Actions)
<input type="checkbox"/>	Moore	Carol	STAFF - VA - 15234	Search Committee Review	March 18, 2015 at 02:16 PM			65.83	<a href="#">Actions</a>
<input type="checkbox"/>	Lee	Travis	STAFF - VA - 15234	Search Committee Review	March 18, 2015 at 02:23 PM			56.67	<a href="#">Actions</a>

- To **export results** from this page to a spreadsheet, click on the **Actions** button and choose **Export Results**

To verify who has scored



- Click box beside **Legal Last Name** to select all
- Select **Evaluate Applicants** on dropdown of **Action** button

➤ Select **View Detailed Entries**



➤ Select the **name** to see who has scored that individual

Scoring Criteria Score Details

Showing 5 Applicants. Show More

Full Name	Current State	Search Committee Review	Overall
Carol Moore	Search Committee Review	75.00	75.00
Samantha Savage	Search Committee Review	100.00	100.00
Jane Murphy	Search Committee Review	0.00	0.00
Kate Wise	Search Committee Review	50.00	50.00
Mortimer Moose	Search Committee Review	-	-

A green arrow points to the name 'Carol Moore' in the first row. Another green arrow points to the dash '-' in the 'Search Committee Review' column for 'Mortimer Moose', with a box labeled 'Never Ranked' next to it.

Scoring Criteria Details and Overrides

\* Required Information

**Workflow State: Search Committee Review**

Reviewer Name	assessment* (weight: 100)	Comments
Carl Wathne	Candidate strongly meets the qualifications - 3 points(3.0 points)	N/A
Average Score	3.00 points	
Total		75.00

A green thought bubble contains the text: 'In this example only 1 committee member scored'.

<no value entered> means not scored by individual listed.

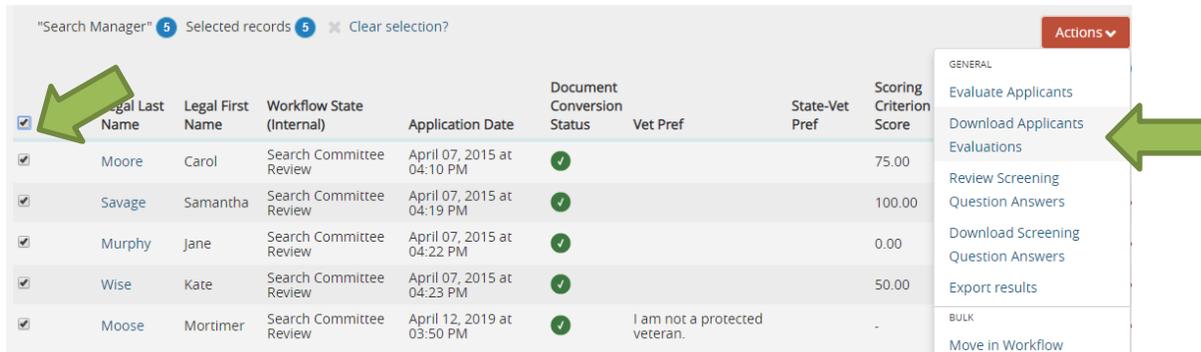
- Once the Search Committee members have completed the evaluation of the applicants and logged out
- Search Manager will move the applicants to the next stage of the search process. Once the Search Manager moves the applicants, Search Committee Members do not have access to the ranking screen.

Normal Workflow for applicants:

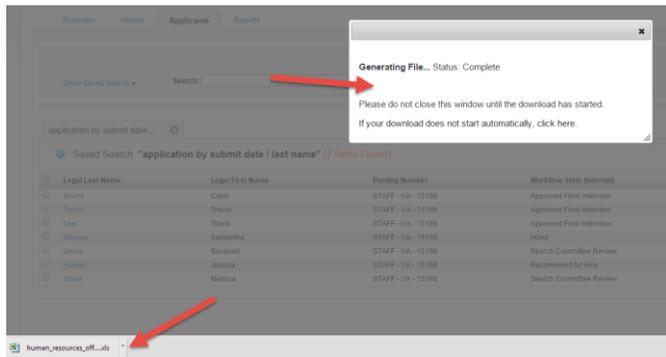
Application:	Who Does Action:
Application Queue	Search Manager
Search Committee Review	Search Manager
Request Initial Interview	Human Resources
Initial Interview Approved	Search Manager
Request Final Interview	Human Resources
Final Interview Approved	Search Manager
Final Interview; Will be considered if candidate declines employment offer	Search Manager
Recommend for Hire	Search Manager
Hired	Human Resources

**Download of Ranking - Optional – NOT REQUIRED: HR can do for you, if requested!**

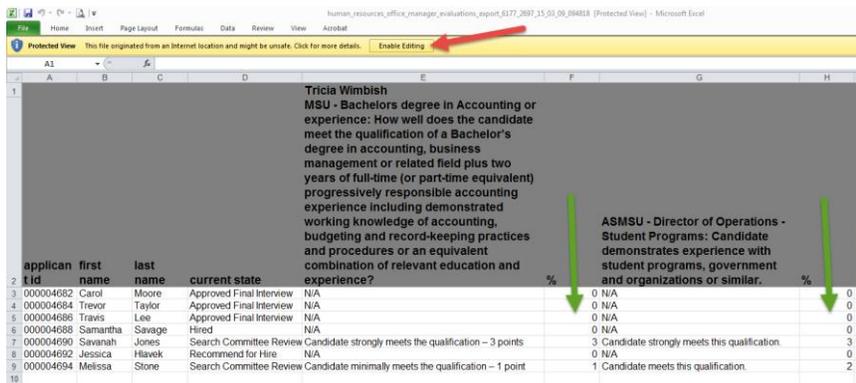
To download the ranking to see scores follow these steps.



- Click the **Actions** button
- Select **Download Applicants Evaluations**



- The Generating File message box will appear.
- When the file is ready, it will appear in the lower left corner.
- Click the file to open (file will open in Excel).



- Click the **Enable Editing** button at the top.
- Reduce Column width to 30 and scroll across to see if each committee member has 4 ranked
- Columns marked with a % sign indicate the ranking you have given the applicant