Introduction

Welcome to the Oberlin College and Conservatory PeopleAdmin Applicant Tracking System. Hiring Managers will use the system to:

1. Request to Hire to fill vacancy or new position,
2. Build a job posting request,
3. Access, review and print all application documents anywhere, anytime to speed up review and evaluation,
4. Eliminate time-consuming and inconsistent applicant screening methods,
5. Use screening methodologies to evaluate applicants on both subjective and objective criteria to ensure the best possible candidates are identified,
6. Conduct more effective and fewer meetings,
7. Develop applicant reports.

HR has provided this document to assist hiring managers in understanding and using the PeopleAdmin System.

There are additional documents with more detailed step by step instructions that can be provided upon request. Please call or email Human Resources for more details.

Your Web Browser

The PA System is designed to run in a web browser over the Internet. The system supports browser versions of Internet Explorer (8 and above), Mozilla Firefox, Google Chrome and Safari. Since older browser versions are less powerful than newer versions, the appearance of certain screens and printed documents may be slightly askew.

The site also requires users to have Adobe Acrobat Reader installed. There is a free download available at http://www.adobe.com.

We recommend that users do not use a browser’s “Back” or “Forward” buttons to navigate the site. 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 180 minutes of inactivity. Therefore, we strongly recommend saving any work in progress and logging out of the system when it is not in use.
Finding Your Way

To log in to the PA Applicant Tracking System please go to https://jobs.oberlin.edu/hr or search using Oberview system and log in using single sign in credentials and go to Current Oberlin Employees: CLICK HERE

Once you are logged in you will land on the Home page. Make sure your USER ROLE is changed to “Supervisor/Hiring Manager”. (Don’t forget to change the role and select the refresh button, if need be)
Navigation of a Posting

**Navigation Bar** – the top of the screen is the area containing the tabs to major sections of the site – Home, Postings and Help.

**Posting** – Description below of items that results in a position announcement on Oberlin College Job Portal. Be prepared to have this information available when requesting a job posting.

**Position Request Information** – details about the position, is it new, a replacement or restructured position. Only complete one of these 3 sections.

**Posting Details** – Information about the position and the Announcement Information that is viewable on the Oberlin College job portal. This will include the full job description details.

**Position Budget Information** – basic details about the funding of the position

**Applicant Documents** – specify required documents from applicants.

**Supplemental Questions** – questions asked to all applicants at the time of the posting (answers can be used later to qualify or disqualify a candidate). Not necessary to complete this section.

**Qualification Groups** – two or more supplemental questions that COMBINED will produce a qualifying or disqualifying answer. This is mostly used when experience is accepted in lieu of education. *Not necessary to complete this section.*

**Guest User** – when non-college/external users are granted access. *Not necessary to complete this section.*

**Search Committee Member** – a list of all users assigned as Search Committee Member(s) and Chair(s). *Note: A committee chair must always be selected.*

**Evaluative Criteria** – close ended screening questions based on the actual basic qualifications for the position.

**Posting Documentation** – supporting documentation given at the time of posting approval (could include external position description and/or support for search).

**Reference Letters** – settings of reference letters and/or reference names were to be provided. See reference letter set up to utilize this section. Must complete 2 sections for this go be correctly activated. *Generally used for faculty and teaching searches only.*

**Summary** – preview of entered information.
### Example of Posting Summary Page

**Posting Status & Detail**
- **Current Status** - Creator – Department - Owner

**Tabs**
- History screen will show workflow movement

**Take Action** – to approve and move posting in workflow.
- Add to Watch List to see your posting on your home screen.

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### Posting Details

<table>
<thead>
<tr>
<th>Position Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position Title</strong></td>
<td>Test - Sr. Director</td>
</tr>
<tr>
<td><strong>Position Number</strong></td>
<td>T2222</td>
</tr>
<tr>
<td><strong>Posting Number</strong></td>
<td>APS150049PS</td>
</tr>
<tr>
<td><strong>Supervisor Name</strong></td>
<td>John Doe Sr.</td>
</tr>
<tr>
<td><strong>Supervisor's Position Number</strong></td>
<td>T5555</td>
</tr>
<tr>
<td><strong>Hiring Manager</strong></td>
<td>Beth Gonzales</td>
</tr>
<tr>
<td><strong>Applicant Reviewer</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Continuing/Non-Continuing</strong></td>
<td>Continuing</td>
</tr>
<tr>
<td><strong>Classification</strong></td>
<td>Administrative &amp; Professional Staff</td>
</tr>
<tr>
<td><strong>ECLS</strong></td>
<td>CF</td>
</tr>
<tr>
<td><strong>Desired Start Date</strong></td>
<td>08/01/2021</td>
</tr>
<tr>
<td><strong>Position End Date</strong></td>
<td></td>
</tr>
</tbody>
</table>
As the hiring manager, you are the requestor of the posting/hire. You may assign an “Initiator” that will begin the posting process, but you are to review that all the information is correct and accurate before it is sent off to other levels in your organization to approve the posting/hire request. If you do not use an “Initiator”, you can start the posting at the “Supervisor/Hiring Manager” level, there is no need to change your role to “Initiator” if you are intending to be the Hiring Manager. You will most likely be the one to monitor and ensure that the posting gets published, so as the Hiring Manager you will have complete view access of the posting from inception and throughout the lifecycle of that post.

Quick Steps to Building a Posting

1. On the Home Page, from the Posting Tab, select the appropriate employment group and Create New Posting

2. Choose Type of Posting Builder:
   a. CREATE FROM POSITION TYPE – If you are starting from SCRATCH, use this option
   b. CREATE FROM TEMPLATE – Templates may not be available.
   c. CREATE FROM POSTING – If you want to copy from an EXISTING posting, use this option. (you can only create from a previous posting if you created it previously)

3. The system will provide the posting settings page for New Posting
   a. Applicant Workflow: do you want an Applicant Reviewer to help assist in filtering through the applications? Choose the Workflow State: Initial Applicant Reviewer otherwise choose Under Review by Hiring Manager
   b. References: do you want to collect reference letters directly from the source? You will want to use this section. See “Quick Steps to Build References” for detailed instructions. Reserved for faculty postings.
   c. Accept Online Applications: LEAVE THIS BOX CHECKED. Only in special circumstances should this be unchecked. (note this must be approved by HR)
   d. Accepted Application Forms: Choose ONE type of application (Some postings only have ONE type of application)
      i. Short Application: this collects basic employee information, documentation, references and acknowledgement
      ii. Extended Application: includes all short application fields AND education and employment background

4. Complete the succeeding tabs. For more information on each tab, see “How to Build a Posting”.
5. When you reach the Summary Tab, any tab that has an exclamation point (!) next to it indicates required information is missing and must be completed before moving forward.
6. Toggle over the Take Action on Posting and select the appropriate workflow state.

7. Add any necessary comments in the Comment Box keeping in mind these comments appear in the email message sent to thenext approver in the workflow and also become a permanent part of the recruitment record and cannot be removed.
The first question you need to ask yourself is, “How do I want to collect references?” There are four ways to collect references:

1. Request a List of References Under the Applicant Documents; choose the List of References document type. Make this required so that applicants must provide a document with a list of reference names and contact information.

2. Ask for Letters of Recommendation FROM a Candidate
   Do you want your candidate to load letters directly to the system? Under the Applicant Documents; choose the Reference Letter 1, 2, and/or 3 (depending on the number of references you want) document types. Make this required so that applicants must provide letters from each reference.

3. Ask for Reference Contact Information
   All applications have a reference section that the applicant can fill out and provide Name, Title, Relationship, Email and Phone #. UNDER Reference Letter Settings, make sure to enter the minimum and maximum # of references you would like the applicant to provide. This will validate against the application and will not allow the applicant to complete the application. It is suggested that you state the # of references needed in the special instructions or in the job announcement.

4. Collect references directly from the source! (Generally used for faculty and teaching searches only)

5. Do you want the provider to send you the references directly? This is a TWO STEP process:
   - Step 1 - Settings: Under the Posting Settings>References:
     a. Reference Notification: choose the workflow state you would like the providers to be notified that they must complete a reference letter
     b. Recommendation Workflow: if you want to MOVE a candidate into another workflow after the minimum references are collected, choose the workflow to move the candidate in to.
     c. Recommendation Document Type: To accept a letter, Choose Letter of Reference as the document
   - Step 2 – Posting Detail: Under Reference Letter Settings Tab:
     a. Accept Reference Letters? YES
     b. Confirmation Message: Leave Blank – System has default built in.
     c. Cutoff Date: Choose a date you will no longer accept references – Make sure enough time to collect.
     d. Max Entries: Choose how many references will you allow
     e. Min Entries: Choose the minimum a candidate needs before submitting their applications
     f. Special Instructions: Leave Blank
     g. Reminder Days: How many days before the Cutoff Date will you remind providers to send in their recommendations

**Note***
Option #4 automates the reference process. Once an applicant submits their applications and it moves into the REFERENCE NOTIFICATION workflow specified, an email will trigger to all providers asking them to submit their recommendation letters directly into the system. The provider and applicant will get a confirmation email when the reference is submitted. Providers have the option to deny recommendation. The applicant will not know who did or did not submit a recommendation, nor will the applicant know what the recommendation letter said. As a Hiring Manager, you will be able to review the recommendations and push through who you want to the next workflow, regardless if the min # of recommendations were given. If you need help with this section, contact Employment Operations Rep. (Recruiter) in Human Resources.
Once a posting is published you will be notified via email. You can check the posting daily, to see the volume of applicants and even review applicant data. But it might be more beneficial to wait until the posting closes since applicants have the ability to withdraw their applicant and those that are in draft mode cannot be seen. The Hiring Manager has full responsibility at this workflow.

**Applicant Reviewers**

Do you need someone to help you manage and filter the initial applicant pool? Then you will want to assign an Applicant Reviewer. This may be an AA in your office or HR to assist in reviewing the pool and filtering candidates that meet minimum qualifications. An Applicant Reviewer will have access to the applicants and the sole ability to move to the next queue, “Under Review by Hiring Manager”.

**Search Committee Members**

Do you want other co-workers to help review applicants and/or conduct interviews? Assigning others that are NOT hiring managers as Search Committee Members will allow you to share information and solicit input on hiring the best candidate. *Note: A committee chair must always be selected.*

SCMs are available for the following position types:

- Faculty
- Professional Staff
- Support Staff

SCMs are able to:

- View applicants and rate/score or comment as needed to assist in finding the best candidates.
- Ability to move forward an applicant that the SCM feels is qualified and merits an interview.
  - Faculty Postings: Search Committee Member is required, even if only the Hiring Manager is added as SCM
  - Professional Staff: Search Committee Optional - Hiring managers have the ability to not use this feature and move applicants directly to interview status OR they can send their choices to SCM and SCM will choose which candidates are moved to interview

See the Search Committee User Guide for detailed information on the roles and responsibilities.
Viewing Applicants

To view the applicant pool, click on the “Applicants” tab.

Searching for a Specific Applicant

To search for a particular applicant by name

1. Use the Search text box (below the “Applicants” heading)
2. Enter the applicant’s name and click “Search”
3. The “More search options” tab allows you to expand the search to include other specific information such as the workflow status of the applicant
4. Click on the Applicant’s name to view their application and uploaded documentation
To download an application or group of applications, click on the select box to the left of an applicant’s name. A check mark (✓) will appear by each name selected. Hover over the Blue “Actions” tab to the right of the “Default Job Applications” heading and select “Download Applications as PDF” and follow the instructions. The “Download Applications as PDF” combines all applicants into one file. The operation may take a few moments. Once the PDF file is generated, you may save it to your desktop or print it.
Part of a Hiring Manager role is to move candidates through the system as part of the review process. Hiring Managers, along with SCMs (when assigned), will review candidates using the above methods and when the candidate is in their own workflow state, the Hiring Manager or SCM has the option to either Select a Candidate or Not Select a Candidate.

How will I know a candidate is in my workflow state?

As a Hiring Manager you will have full access to candidate and will be able to see what stage the applicant is currently in. Please notify your Search Committee Members when the applicant pool is ready and you if you have moved applicants into their state. Depending on the type of search, the Hiring Manager will have vetted some of the candidates already or possibly move them all to SCM workflow state. You will need to log into PeopleAdmin and perform the following steps:

1. Select the posting that you working with
2. Select the Applicant Tab
3. Review the list of applicants, The Workflow State (Internal) will identify where each candidate is within the process. To filter out large pools, you can select specific workflow states to review.
4. Under the Workflow State Option, select , click Search
5. Select the name or names of the candidates you would like to take action (select or not select for 1st Interview)

a. To Select in BULK, click the select box next to the name(s) of the candidate you want to move, and click the Blue “Actions” button, select “Move in Workflow”. Another screen will appear and you will need to select “Change for all applicants” if you want to default in the workflow state or choose a new state for each candidate. If you are NOT selecting them for interview, a reason must be selected. Save Changes.
b. To Select an individual candidate, click on the name of each candidate. This will take you to a new screen that displays the candidate’s application and documentation. You should see an ORANGE “Take Action” Button. Click the button and choose the appropriate action. If you choose NOT to select the candidate for interview, a pop up box will appear, asking you to choose a reason.
6. You will continue to process candidate through the workflow state. Moving fewer and fewer closer to the “recommend for hire” state. Those left behind you can either select: “Interview, Not Hired” or “Not Interviewed, Not Hired” and give a reason. OR, wait until the end and clear out all other candidates after your top candidate has accepted an offer. (This replaces the R&A)

The below illustration shows how the Applicant Workflow is designed by Position Type. As you move through each step you should be moving less and less candidates through the process.

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**Recommend For Hire**

Once you have your top candidate selected. You will want to choose “Recommended for Hire”.

This will move the candidate to the “Hiring Proposal” state. An email will be sent to the following groups, depending on position type:

<table>
<thead>
<tr>
<th>Professional Staff</th>
<th>Faculty</th>
<th>Support Staff</th>
<th>Temp Workers</th>
<th>Student Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager</td>
<td>Hiring Manager</td>
<td>Hiring Manager</td>
<td>Hiring Manager</td>
<td>Hiring Manager</td>
</tr>
<tr>
<td>Department Approver</td>
<td>Assoc Dean</td>
<td>Department Approver</td>
<td>Hiring Manager</td>
<td>Hiring Manager</td>
</tr>
<tr>
<td>Dean/Division Head</td>
<td>Dean/Division Head</td>
<td>Dean/Division Head</td>
<td>Dean/Division Head</td>
<td>Dean/Division Head</td>
</tr>
</tbody>
</table>
Creating a Hiring Proposal

The hiring proposal replaces the R&A and Student Employment Card. It also improves the appointment letter process. If you did not select “Recommend for Hire” you will receive an email letting you know that someone did and you now have the ability to start the Hiring Proposal. Otherwise, you most likely choose the candidate and you can now begin to complete the final request that will go to HR.

1. To start the Hiring Proposal, click on the + next to the appropriate Hire Type (if more than one).

If you get the warning “Warning: This Applicant already has a Hiring Proposal in process.” You will not be able to continue with the Hiring Proposal. You will need to contact HR or Student Employment Office (depending on the position type), a super user will need to start the Hiring Proposal for you.

2. Click on the “Start xxxx Hiring Proposal” button

3. Similar to the Posting Process, the Hiring Proposal will take you through a few tabs, collecting information needed to hire the candidate.

   a. Review Applicant Information to ensure it is correct. If you notice something wrong, please confirm with applicant and contact HR for changes.

   b. Review Position Information, this should have pulled from the Posting process. Complete all required information.

   c. Under Hiring Information (for all positions except Student), please give a reasoning for selecting this candidate. Provide campus location, if known, and desired start date, salary and FTE. This can be the same as what the job was advertised with and will probably be finalized during the verbal offer.

   d. Click the Orange Next Button

   e. Review and update information required.

   f. If you have a draft copy of the appointment letter you upload it now.

   g. Review all entries and when satisfied, click on the Orange Action Button and choose “Submit”.

   Depending on the position, the hiring proposal will either go to:

<table>
<thead>
<tr>
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<th>Faculty</th>
<th>Support Staff</th>
<th>Temp Workers</th>
<th>Student Workers</th>
</tr>
</thead>
<tbody>
<tr>
<td>For Athletics – Division Head for Verbal For other professional staff to Department Head for Approval</td>
<td>To Dean or Associate Dean for Verbal Offer (depending on continuing or non-continuing)</td>
<td>HR Recruiter for Verbal Offer</td>
<td>HR Recruiter for Background Check</td>
<td>Student Employment Office for Position Set up</td>
</tr>
</tbody>
</table>
4. You can continue to monitor the Hiring Proposal to watch it transition through the various stages. Once the verbal is accepted, a letter is sent. The candidate has a set time period to return the signed appointment letter. The signed appointment letter should be uploaded to the Hiring Proposal and then moved to “**Background check pending**”. A system email will be sent to the Recruiter who will initiate a Welcome email to the candidate. The background check will take 2-7 days. Once approved, the hiring proposal will go through a final check and the candidate will be set up as an employee. You should receive an email at the time the employee is “Hired”.

**Closing out the Posting**

Once your candidate is hired, and an offer letter has been accepted, you must now go back and clear out all other candidates still in an active status in the system. Do this only after the background check comes back clear. HR will communicate that information and will also close the job posting so no other applicants apply, if not already closed.

1. Go back to your posting and select Applicants Tab, this should list all active applicants.

2. You will know need to move all active candidates to which ever status applies: “not interview, not selected”, “interviewed, not selected”. For ease in moving applicants, you can sort your applicants by the Workflow State so you are only selected those in the same workflow and moving those in BULK together.

   a. To Select in **BULK**, click the select box next to the name(s) of the candidate you want to move, and click the Blue “Actions” button, select “**Move in Workflow**”. Another screen will appear and you will need to select a new state for each candidate. For each **NOT** hire, you must also select a reason. Save Changes.
b. To Select an individual candidate, click on the name of each candidate. This will take you to a new screen that displays the candidate’s application and documentation. You should see an ORANGE “Take Action” Button. Click the button and choose Not Hired action. A pop up box will appear, asking you to choose a reason.

![Take Action On Job Application](image)

![Take Action](image)

This is the most common reason used for not selecting a candidate for an interview.

Once all candidates have been moved to a Not Hired or Hired state, you should see no more active applicants in your pool. Please notify HR that you have cleared out all the applicants and HR will “Fill” the position. An email will then go out to all candidates not hired. HR can assist with closing the posting and transitioning the applications.

Please contact the hiring manager if you have questions or contact HR at Human.Resources@oberlin.edu or by calling 440-775-8430 or 440-775-5576.