People Admin User Guide

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Creating a Staff/Union position for posting:

Before you begin…
Have the following information ready to streamline entry:

- Position Number (call budget office if you do not know the number or need a new one)
- Grade
- Budgeted Salary
- FOAPAL(s)
- Position title
- Job Description & Basic Requirements

To log into People Admin go to the Human Resources website http://www.wpi.edu/offices/hr.html and click on People Admin Login

You should be under the Position Management Module (orange) and your user type should be administrator, supervisor/manager, or department head depending on your position. If you change your user type, be sure to click on the refresh button next to the box. Click on Position Descriptions – and select Staff to begin.
Go to Create New Position Description and choose New Position and Posting
Enter the title of the position, select your division and department then click on Start Position Request.
***Do not select Clone and existing position description*** if you are creating a new position description.

The system will let you know about required fields. Complete each section and click “Next”. The action of clicking “Next” and moving to the next page saves your information. You’ll be able to edit before submitting.
Enter Principle Duties and Responsibilities next. You can add multiple duties by clicking on the Add Principal Duties and Responsibilities button. Click on next when finished.

Enter Position Requirements next. You can also add multiple requirements by clicking on the Add Position Requirements Entry button. Click on next when finished.

Enter budget details for the position. Enter the budgeted salary. Then click on the “Add Budget Information Entry” button to list the FOAPAL, department, percent and position number. If the position is funded from more than one FOAPAL, click “Add Budget Information Entry” until all FOAPALs are listed. Of course, they must add up to 100%. Click on next when finished.

*** The Add Budget Information Entry button is a required field. The position description will not be moved along until this information is complete.
Enter Posting Information: List the desired posting date and a closing date, if applicable. You may also check the box “Open until Filled. There’s a space for special instructions for applicants and a box to list desired external advertising sources. Positions are not automatically posted to the sites listed. You will have to email human-resources@wpi.edu to have positions posted externally.

** Important! If you enter a closing date the system will automatically remove the posting from the web site on that date.

This section will carry over to the posting created by HR.

<table>
<thead>
<tr>
<th>Budget</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested Salary Range</td>
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</tr>
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</table>

Enter budget information by clicking on the Add Budget Information Entry button.

<table>
<thead>
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<th>FOAPAL</th>
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<tr>
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<tr>
<td>Percent</td>
<td>100</td>
</tr>
<tr>
<td>Position #</td>
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</tr>
</tbody>
</table>

** Remove Entry?

[Add Budget Information Entry]
Applicant Documents allows the parameters for documents that must be uploaded. Check the “Required” box for mandatory documents. If an item is marked “required” the applicant will not be able to submit their application without attaching these documents. Check optional if you would like these documents but they are not required. They can still apply without attaching optional documents. Click on next when finished.

Supplemental questions can be as simple as finding out where someone heard about the position to as complex as assigning points or disqualifying points. Specially tailored questions can be added. To add a question click on the “Add a question” box.
Reference letters can be handled through the system, which will generate emails to the references listed on the employment application. Leaving this box marked “No” will keep the current practice of checking references manually. This function is applicable to faculty searches. Click on next when finished.

When all the information has been entered, a summary will be available. Any missing information will be highlighted with an exclamation mark. Sections can also be edited. If you make a change, be sure to save it. If all information is complete you will see the check marks next to each section. You will not be able to submit to your Supervisor/Department Head unless there are all checkmarks.
At the top of the page click the down arrow on the box that says, “Take Action On Position Request”. Send to your supervisor, department head or division head whichever is the next level of approval for you.

A box will appear to take action. You may add a comment that the next approver will see. Check off “Add this position request to your watch list” and you will be able to view it from your inbox to check on the workflow status at all times.
Once this reaches Human Resources they will then send to Budget Office and approve and post the position.

Please call us at 508-831-5470 or email human-resources@wpi.edu if you need assistance!

Creating a Faculty posting:

Before you begin...
Have the following information ready to streamline entry:
• Position Number (call budget office if you do not know the number or need a new one)
• Grade
• Budgeted Salary and startup expenses, if applicable
• FOAPAL(s)
• Position Title
• Job Description & Basic Requirements
• Will this posting accept reference letters, if yes, how many? When do you want the references? At time of applying or when asked to provide?
• Search Committee Members (if known)
• Evaluative Criteria for search committee
• Any supplemental questions you want asked at the time of applying

Getting Started:
To log into People Admin go to the Human Resources website http://www.wpi.edu/offices/hr.html and click on People Admin Login.
You should be in the Applicant Tracking Module (blue). Click on Create New Faculty/Research Posting and Create from Position Type.
Next fill in the position title, division and select your department from the drop down list. Leave Applicant Workflow State as “Under Review by HR”.

If you would like to accept references letters for this posting click on “Accept references”. This will open up more options. Change Reference Notification to “Under Review by Department” which means when an applicant is moved to the status of “Under Review by Department” (performed by HR at time of applying for ALL applications) an email will be sent to the references provided in the applicant’s application. If you prefer to solicit the references at a later time you can select “Reference Checking” from the drop down list. The hiring department will need to go to the applicant list and change the applicant’s workflow state to “Reference Checking” which will then generate and email to the references listed on the applicant’s application. Once all the references are provided the department will need to change the workflow state back to “Under Review by Department” or another applicable workflow state from the drop down list.

Next always select “Reference Letter” under Recommendation Document Type.

You can also enter any special offline application instructions. Click on the orange box “Create New Posting”
Posting Details:

You should see a green-highlighted message “Posting was successfully created”. Now you will enter all the required information. As you progress, the box to your left, a type of checklist, will also show you where you are in the posting. You can click on next when each section is complete. Make sure you click on the gray “Add Principal Duties and Responsibilities Entry” and “Position Requirement Entry”. You may add additional entries to each.
Budget:

Enter the Requested Salary Range then click on the gray “Add Budget Information Entry” to add your FOAPL, Department or Grant Name, Percent and Position Number.

*This is required in order to move this posting forward in workflow.

If you have multiple funding sources, click “Add Budget Information Entry” again to include additional funding sources.

When budget information is entered click on Next.

Faculty Position Information:

Complete as much information as you can about associations that will be notified of the opening, the screening process, any special expectations, advertising and recruiting costs, start up and support salaries, etc.

The posting date can be today’s date.

You should leave the Closing Date blank: if you enter a date the posting will drop off the website on that date regardless of the status. Click “yes” for “Open until Filled.

Any “Special Instructions to Applicants” can be entered here. This will show up on the posting.

The advertising sites listed are only a guideline. You should submit your ad and sources to the Provosts Office for approval who will work with HR to place your ads.

Click Next when finished.
Applicant Documents:

Fill in the radial button on each item. Not Used, Optional, Required.

*If an item is “required”, the applicant will not be able to complete the application process if a required item is not uploaded.

*There is no need to require a List of References if you are using the reference checking section. You could make this optional if you want additional references not listed on the applicant’s application.

Click Next when finished.

Supplemental Questions:

You may choose questions from a list for prescreening candidates by clicking on the orange “Add a question” box. If you would like to create your own question, click on Add a new one.

Click Next when finished.
Reference Letter:

This section manages the automatic emails that will go out to reference providers that were listed on the applicant’s application. The “Will this position accept reference letters?” box should be checked Yes. Follow the prompts for the number of days between reminders and a cutoff date. You may set a minimum and maximum number of references. We recommend 7 days between reminders. Any special instructions to the references can be added here also.

Guest User:

Guest Users can be added to view the posting. Click on gray Guest User button. Enter their email addresses. A username and password will be created and emailed to each user listed when the posting is active. Guest users will only be able to view the posting and see and print applicant documents.
Search Committee:

This feature allows the setup of a search committee for the posting. Follow instructions listed in People Admin in this section. You may search from existing users or create new accounts. If you search and do not find the user, enter a request and you’ll receive the message “An account for the member has been requested”. HR will receive and approve the request. Their name will be added to the list. You can designate a chair also.

Search Committee Members

No Search Committee Members have been assigned to this Posting yet.

Search

Find a User to assign as a Search Committee Member.

First Name
Last Name
Email Address

Search

New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member. Required fields are indicated with an asterisk (*).

Account Information

Please enter the following information to create an account for a new Search Committee Member:

^ First Name
^ Last Name
^ Email
^ Username

Submit

Evaluative Criteria:

Click on the button labeled "Add a Criterion". A pop up section will appear where you can add an existing criterion or create a new one. There are two ways to search for approved criterions to add to the job being posted. You can filter using the key word search or filter by criterion category. Select which one you want or create a new one.

Assign Points: Click on the criterion that has been added and a dropdown menu will appear where points can be associated to each answer on the criterion.
Workflow State: Select the workflow state in the applicant process when you would like for Search Committee Members to begin rating applicants for the selected criterion.

Criterion Weight: You can designate the weight of a criterion relative to others in the weight field. It is recommended your total weights add up to 100 in order to easily use this function. (The system will not check nor force you to have your total weight equal 100).
The search committee will then be able to evaluate the applicants.

Summary:

Review all your entries and edit if needed. **If you see an exclamation mark that means required information is missing.** Click on edit and enter the information and click on save. Once everything is complete and you see all check marks then click on orange “Take Action On Posting”. Depending on your office policy, submit to Supervisor, Department Head or Dean. Add comments if you wish. If you keep the “add this posting to your watch list?” box checked, you will see the position each time you open PeopleAdmin.

will need to review this section and make necessary corrections before moving

Posting Details  Edit

Posting Details

Posting Number

Position Information

<table>
<thead>
<tr>
<th>Position Title</th>
<th>Test</th>
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</thead>
<tbody>
<tr>
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<td>Faculty Title</td>
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<tr>
<td>Tenure Track</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>ACADEMIC AFFAIRS</td>
</tr>
</tbody>
</table>
Check list for posting:

- Review ad summary for how many references are required.
- Go to settings tab and make sure the “accept references box” is checked. Reference notification should be “Under Review by Department”. Recommended document type should be “Reference Letter”.
- Accept on-line applications should be checked off.
- Make sure applicant document types are correct (required vs. optional) on the summary.
- Reference letter section should say “yes” – will accept reference letters
- Email reminders should be 7 days.
- Minimum and maximum number of requests should coincide with what is required in the ad summary.
- Search committee members should all have approved status.

**Search Committee Tips**

To log into People Admin go to the Human Resources website [http://www.wpi.edu/offices/hr.html](http://www.wpi.edu/offices/hr.html) and click on People Admin Login.

**Getting Started!**
You want to be in the “Applicant Tracking” module in the upper right hand corner. The background for this module is blue. Next, select the “Postings” tab and click on Faculty/Research. Make sure your user type is set to “Search Committee Member” then refresh. You will then be able to see the postings in which you were assigned Search Committee status.
Viewing Applicants:

Next click on the posting you want to view and select the applicants tab. You will be able to see a list of applicants. You can view each applicant by selecting actions or clicking on the last name of the applicant. Their application materials including references will be available for you to view, print or email.
Evaluating Applicants:

Should your search committee be asked to evaluate applicants, you may do so from the actions button at the top of the applicant list and select “evaluate applicants”. A list of applicants will appear with the evaluative criteria you need to score the applicant. Fill in your score and comment. Then save.

If you are the Chair of the subcommittee you will be able to view and download all the search committee’s applicants evaluations by going to the Actions button and selecting “Download Applicants Evaluations”. There is also an expanded search feature which will allow you to customize your search and save and download to an excel spreadsheet. You can go to “more search options” and add an item from the “add column” list. This will show up as a column header below. You can choose “export results” from the actions tab and an excel spreadsheet will be created.

Please call the Office of Human Resources if you have further questions on this section.
Modifying a Position Description (or filling an existing position for posting):

To log into People Admin go to the Human Resources website http://www.wpi.edu/offices/hr.html and click on People Admin Login

You should be under the Position Management Module (orange) and your user type should be supervisor/manager, or department head depending on your position. If you change your user type, be sure to click on the refresh button next to the box. Click on Position Descriptions – and select Staff to begin.

A list of position descriptions will appear that report to you. Click on the Position Title to open up the position description that you want to modify.
Click on Modify Position (Post if Applicable)

This message will appear – click on start

Enter the action you wish to take and the reason for your action. Click on next when finished.
This will move you to the next step which is position title/classification. This is NOT the position title but it is the classification which the title falls under. Make sure the appropriate one is selected and click on Next.

Update any needed information in this section and click on Next when finished.
You may add or change information in this section by selecting the Remove Entry box, deleting and typing in the Principal Duty and Responsibility box itself and/or clicking on the Add Principal Duties and Responsibilities button. Your changes will be tracked throughout the process and viewable to the approver.

You can do the same with the requirements section. Click next when finished.

Make sure all the budget information is included. Click next when finished.
The next sections (Posting Information, Applicant Documents, Supplemental Questions, Reference Letter) are if you intend to post this position. If you are doing a modification you skip and go directly to Position Request Summary.

If you are going to post this position to fill an existing position you will need to enter the Posting Information.

Enter Posting Information: List the desired posting date and a closing date, if applicable. You may also check the box “Open until Filled. There’s a space for special instructions for applicants and a box to list desired external advertising sources. Positions are not automatically posted to the sites listed. You will have to email human-resources@wpi.edu to have positions posted externally.

** Important! If you enter a closing date the system will automatically remove the posting from the web site on that date.
Applicant Documents allows the parameters for documents that must be uploaded. Check the “Required” box for mandatory documents. If an item is marked “required” the applicant will not be able to submit their application without attaching these documents. Check optional if you would like these documents but they are not required. They can still apply without attaching optional documents. Click on next when finished.

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When all the information has been entered, a summary will be available. Any missing information will be highlighted with an exclamation mark. Sections can also be edited. If you make a change, be sure to save it. If all information is complete you will see the check marks next to each section.
At the top of the page click the down arrow on the box that says, “Take Action On Position Request”. Send to your supervisor, department head or division head whichever is the next level of approval for you.

A box will appear to take action. You may add a comment that the next approver will see. Check off “Add this position request to your watch list” and you will be able to view it from your inbox to check on the workflow status at all times.
Once this reaches Human Resources they will then approve the position and post if applicable.

Approving a Position Description or Position Modification:
To log into People Admin go to the Human Resources website http://www.wpi.edu/offices/hr.html and click on People Admin Login

You should be under the Position Management Module (orange) and your user type should be supervisor/manager, or department head or division head depending on your position. If you change your user type, be sure to click on the refresh button next to the box. Click on Position Descriptions – and select Staff Position Requests to begin.

A list will appear. Find the position that needs approval and click on the position title to open the position description.
This will bring you to the summary of the position description. Review the information. Sections can also be edited. If you make a change, be sure to save it. At the top of the page click the down arrow on the box that says, “Take Action On Position Request”. Send to your department head, division head or human resources, whichever is the next level of approval for you.

A box will appear to take action. You may add a comment that the next approver will see. Check off “Add this position request to your watch list” and you will be able to view it from your inbox to check on the workflow status at all times.
Once this reaches Human Resources they will then approve the position and all changes will be updated.

Managing your posting in PeopleAdmin

Now that you your open position has been approved and posted on the Human Resources website along with any additional external sites you will be receiving applications to review. To locate your applications you will need to log into PeopleAdmin via the Human Resources website [http://www.wpi.edu/offices/hr.html](http://www.wpi.edu/offices/hr.html) and click on People Admin Login.

You should be in the Applicant Tracking Module (blue). Click on Postings and select either Staff, Faculty/Research or Union whichever opening you have.

Your posting will be listed below. Click on the position title and it will open up the posting. Once the posting is open you will see the following tabs:
Click on the Applicants tab and a list of the applicants will open up. Click on the applicant’s last name and it will open up their job application where you can view any required documents such as their resume and cover letter if required.

You will also be able to view multiple applicants at a time by clicking on the check box before each applicants name and going to the actions button above the actions column. You can also click on the check box next to “Last Name” in the column header to view all the applications at once. This will open up a PDF.

Select Download Applications as a PDF and you will be able to select which documents you want to see. Hit submit and a pdf will created.
Completing a Hiring Proposal:

Congratulations! You have decided on the applicant for your open position. You will move through the workflow to create a Hiring proposal, which, when complete, will result in the Office of Human Resources & Payroll extending a job offer with start date.

Begin with the Posting. Click on the Applicant List. Select the Applicant you wish to hire by checking off the box before the Last Name and select Move in Workflow from the Actions button above the Actions column.
Change the workflow state to “Request to Hire” and click Save Changes.

You will now see the status has been changed in the applicant list. Click on the last name of the applicant.

The application is now open. Click on the green “Start Hiring Proposal”

The position you are looking to hire will be listed and the button should already be selected. Click on “Select Position Description”
The hiring proposal will open up and the information for the position will be prefilled. Review the information and fill in empty boxes (required fields) - specifically the start date, actual starting salary and title and orientation date. This will ideally fall on a Monday so that the new hire can begin with New Employee Orientation. Select Next.

Next you will need to attach reference checks. Click the down arrow next to Actions and select Upload New (they can be uploaded from a saved document) or Create New (you can type them in). They should include all the details of a reference. When all references have been uploaded, click Next.
The Hiring Proposal Summary will appear. Make sure all information is include and there are no exclamation marks. If you have all check marks you are good to go. Then, click the orange box “Take Action on Hiring Proposal” to send to the next level for approval.
Once the hiring proposal is received in Human Resources we will call the candidate to make the official offer, verifying salary and start date. An offer letter will be generated and an offer packet mailed to the applicant’s home address.

**Closing out a search:**

Now that you have submitted a hiring proposal and the official offer has been sent from Human Resources you will need to update your applicant list by changing the statuses of the remaining applicants in the queue. By doing this an email will be generated from Human Resources notifying the applicants that they have not been selected.

**NOTE***No emails will be released until the official offer has been accepted and returned to Human Resources***

**Staff Postings – Your user type should be “Supervisor”**

**Faculty Postings – Your user type should be “Administrator”**

Start by opening up the posting and selecting the applicants tab. The list of applicants will appear. Go to More Search Options and select “Under Review by Department” from Workflow State (this will allow you to bulk move candidates). Select Last Name and Move in Workflow from the Actions button above the actions column.
Select Not Hired from the drop down list and select a reason from the drop list on why this candidate was not selected. This information is used and gathered for Affirmative Action/EEO reporting.

NOTE: If you do not want an applicant to get the rejection email, you can change their status to “Not Hired-Do Not Send Email”. A reason for not hiring will still need to be selected.

**Applicants do not see the selected reasons.**

Select Save Changes.

The applicant list will now show only the person hired. The remaining candidates have been moved to inactive status. You will be able to view them if needed by clicking on More Search Options and selecting Inactive.

You have now successfully completed a search. Human Resources will mark it filled and the candidates will be notified.