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Navigation and Searches

This guide provides instructions on logging in, setting up a user account, requesting a password reset, and navigating the People Admin site.

The Home page of the site serves as the starting point for navigation. The Inbox is utilized to monitor all actions that users are responsible for approving and/or taking an action on to include position and postings. The Watch List is an optional tool that can be used to monitor a process or action.

Key to the basic navigation of the site, is that users will be able to transition between the Position Management and Applicant Tracking module. The Position Management module is used to view, establish new, and modify existing position descriptions. The Applicant Tracking module is used to create postings and review/process applicant flow.

Logging into PeopleAdmin

It is recommended to use either Chrome or Firefox as your web browser. From the web browser, go to the site: https://jobs.wm.edu/hr to login.

Click here to log in with your WMuserid

Click to login with your W&M user name and password

If you are using Guest User credentials to access a posting, enter that Username and Password.
The Home Page defaults to the Applicant Tracking module and is identical in the Position Management module.

**Inbox** - In the inbox the user will find tasks that you need to take an action on. An action indicates moving the posting or description to the next workflow state. Within the Inbox, the first tab, called Postings, presents posting tasks that need an action taken. The second tab, called Hiring Proposals, presents a hiring proposal requiring an action. The third tab, called Actions, will present position description tasks that need an action taken.
**Watch List** - This serves as a reference to monitor the workflow of postings and position description actions you wish to monitor. You are able to select specifically which actions to place in the **Watch List**.

<table>
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<tr>
<th>Watch List (0 items)</th>
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<tbody>
<tr>
<td>Postings (0)</td>
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<tr>
<td>Hiring Proposals (0)</td>
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<td>Actions (0)</td>
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**Shortcuts** - This section may be used to **Create a New Staff/PPF Posting** and to **Create a New Instructional/Executive Posting** from the **Home Page**.

**My Profile** - Provides access to user account details, including managing the account’s password, and editing account information.

**Help** - PeopleAdmin Help is an external site. It is encouraged to use the **My Links** section, found on the **Home Page**, to access further training materials.

**Logout** - The user may logout from any location within the system by selecting **logout** in the upper right corner of the page.
Switching Modules - To switch between the Applicant Tracking and Position Management modules, toggle over APPLICANT TRACKING and select POSITION MANAGEMENT.

My Links - This section allows the user to access Online Help, the Applicant Portal, training materials and the Classification/Compensation Review Form.
Creating a Personalized Saved Search

Searches can be created by the user for personal use. To create a customized search, start by modifying an existing saved search.

1. Select **More Search Options**.

2. The system now presents an **Add Column** drop-down providing fields that can be added to the search.
3. Highlight the desired field to be added such as “Last Updated”.

4. The newly added column will appear next to the Actions column.

5. To save the search, select **Save this search?**
Creating a Personalized Saved Search

6. Provide the search with a name.

   [Image: A form with options to make the search default and a field to name the search.]

   - Default search?
   - Name your search

7. Select the check next to **Make it the default search**? Select **Save this Search**

8. To access your saved search, Toggle over **Open Saved Search**, the new search created will now appear along with any other saved searches.

   [Image: A screenshot showing the saved search options.]

9. The search is also now open and appears as one of the tab options.

   [Image: A saved search titled "Filled/Canceled" with 21 items found.]
Features

Below is a Highlight of the site features.

Action Summary - Can be prompted at any time during an action and provides a preview of the work that has been completed thus far and what still may need to be completed.

Back Button - Internet browser Back Button is fully functional and the user can use this to navigate the system.

Comments - When working on a posting, users have the ability to first leave any comments for the next workflow state owner with regards to the creation of posting. Adding Comments is optional and viewable to anyone who has authorized access to the electronic file and cannot be erased.

Guest User Account - Guest Users are notified of their account access by an automated email when you add the guest users’ email.

HR Suite – refers to the Position Management and Applicant Tracking modules.

Inbox - The Inbox is found on your home page and presents the tasks within the HR Suite. This includes items that are specifically assigned to a user and reflects the current state which requires your action. The Inbox does not include items that are currently assigned to other users.

Ranking Criteria - Section is used for ranking candidates on established search criteria and works with the Search Committee tab.

Save Function - As a tab is completed, the system will save the work up to that point. You can exit the action at any time and the most recently completed tab will be saved. Selecting the Save button at the top or bottom of each page will also save the work before moving on to the next tab.

Search Committee – The Search Committee Member feature works with the Ranking Criteria tab to allow members of your committee to evaluate the candidates using the ranking criterion created by the originator or the posting.

Searches - Each user has access to Saved Searches, as well as the ability to create and save personal searches specific to the user’s account. Additionally, the data within these searches can be personalized to reflect the user’s needs.

Security of Data - To ensure the security of the data provided by applicants, the system will automatically log the user out after 60 minutes if it detects no activity. However, anytime the user leaves their computer, it is strongly recommend that the work in progress is saved and logout of the system by clicking on the log out link located on the upper right side of the screen.

Spell Check - After completing entries on a tab, make use of the Spell Check feature. This feature will highlight by underlining in red, the word(s) misspelled and you will then be able to change to correct spelling.

Summary - The summary page is provided as a document review of the posting to make sure you have completed all the required information before submitting further. An exclamation point is an indicator that a required field not completed in a section of the action. Editor link identifies the field(s) to be completed.

Take Action On Action - When working on a position description or posting Action, in order to move the action to the next step in the workflow. The user will always need to go to the Take Action on Action button to move the position description or posting to the next workflow state.
**Watch List** - The Watch List is found on the Home page and allows the user to determine what actions to “Watch”. It serves as an easy reference to monitor the workflow of certain processes that the user needs to be aware of, such as position description actions, postings or applicant flow.