# Table of Contents

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating a Staff or Professional Posting</td>
<td>2 - 3</td>
</tr>
<tr>
<td>New Posting Settings</td>
<td>4</td>
</tr>
<tr>
<td>References</td>
<td>5 - 6</td>
</tr>
<tr>
<td>Accepted Application Forms</td>
<td>7</td>
</tr>
<tr>
<td>Posting Details Tab</td>
<td>8 - 9</td>
</tr>
<tr>
<td>Recruitment Request Form</td>
<td>10</td>
</tr>
<tr>
<td>Recommendations Tab</td>
<td>11</td>
</tr>
<tr>
<td>Supplemental Questions Tab</td>
<td>12 - 13</td>
</tr>
<tr>
<td>To Create A Supplemental Question</td>
<td>14 - 15</td>
</tr>
<tr>
<td>Sample Supplemental Question</td>
<td>16 - 17</td>
</tr>
<tr>
<td>Guest User Tab</td>
<td>18</td>
</tr>
<tr>
<td>Applicant Documents Tab</td>
<td>19</td>
</tr>
<tr>
<td>Search and Selection Plan</td>
<td>20 - 21</td>
</tr>
<tr>
<td>Staff</td>
<td>20</td>
</tr>
<tr>
<td>Professional</td>
<td>20 – 21</td>
</tr>
<tr>
<td>Internal Documents Tab</td>
<td>22 - 23</td>
</tr>
<tr>
<td>Ranking Criteria Tab</td>
<td>24 - 25</td>
</tr>
<tr>
<td>To Create a Ranking Criteria</td>
<td>26 - 27</td>
</tr>
<tr>
<td>Sample Ranking Criteria</td>
<td>28 - 29</td>
</tr>
<tr>
<td>Search Committee Member Tab</td>
<td>30 - 31</td>
</tr>
<tr>
<td>Summary Tab</td>
<td>31- 33</td>
</tr>
</tbody>
</table>
Creating a Staff or Professional Posting

To begin login to the site at https://jobs.wm.edu/hr. On the Home Page, from the Shortcuts box, select Create New Staff/PPF Posting.

This box will appear for you to choose select Create from Position Description
Creating a Staff or Professional Posting (continued)

Choose the Role Title or Position Title of the position you want to use to create this new posting and hover over Actions to View the position description.

Choose Create From
New Posting Settings

The Position Title will default from the approved Position Description. The Department field may be a drop-down depending on the user’s permissions. If you have more than one department as part of your user assignments a drop-down box will allow you to choose from those departments. If you have one department assigned, that department will default to the field.

Division should always be "Default Division"
References

You have the option to decide if the posting will accept references. If you check the box next to “Accept References” an email generated from the system will be sent to the referee to upload their letter of recommendation. This is a settings page which is required along with the Recommendations Tab when accepting References directly through the secure portal.

If References are accepted a drop-down box appears providing the option to choose at what point during the candidate workflow the references are notified.

This is an option however; if you choose to accept references this field must be completed. If nothing is selected, an email will not be generated to the referee.
You will also decide when Recommendations (References) have been provided, at what point to move the candidate in the workflow. Our recommendation is to leave this field “blank”. If you select a point in the workflow such as “interviewed” and the candidate has moved past that point, no references can be accepted. If you leave the field blank, letters of recommendation can be provided at any time.

You can also identify what type of recommendation will be allowed.

The above screen shot is our recommendation of how best to complete these fields if you are accepting references through the secure portal of the system.
Accepted Application Forms

The system will always default to accepting Online Applications and this should not be changed unless you choose not to accept applications or resumes. Special Offline applications instructions can be provided if necessary.

Depending on the type of position, choose the appropriate application form accepted for this posting.

Accepted Application Forms

- [ ] Staff/Hourly
- [ ] Executive/Professional

Then select

If you fail to choose an application form, this error message will appear in the top left corner.

⚠️ at least one accepted application form must be selected
Posting Details Tab

The Posting Details contains information which will default or automatically be filled in from the approved position description but will be in a “read only” status. The Position Summary field can be edited to describe the position for posting.

These fields will default from the approved position description.

<table>
<thead>
<tr>
<th>Required Qualifications</th>
<th>Experience with training.....</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preferred Qualifications</td>
<td>Prefer experience handling....</td>
</tr>
<tr>
<td>Hiring Range</td>
<td>$23,000 - $26,000</td>
</tr>
<tr>
<td>University Salary Range</td>
<td>U04</td>
</tr>
<tr>
<td>View Salary Range</td>
<td></td>
</tr>
</tbody>
</table>
The Job Open Date, Review Begin Date and Job Close Date are to be completed.

The following information will default to the posting:

- **Pass Message**: Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.
- **Fail Message**: Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions that interest you.
- **EEO Statement**: William and Mary is an Equal Opportunity/Affirmative Action/Equal Access employer and actively encourages applications from minorities, women, disabled persons and veterans.
- **Background Check Statement**: The College of William & Mary is committed to providing a safe campus community. W&M conducts background investigations for applicants being considered for employment. Background investigations include reference checks, a criminal history record check, and when appropriate, a financial (credit) report or driving history check.

Your name will auto populate but Multiple Hiring Officials can be added at the time of creation.
Recruitment Request Form

These fields will default from the approved position description.

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours per Week</td>
<td>Default</td>
</tr>
<tr>
<td>Role Code</td>
<td>19013</td>
</tr>
<tr>
<td>Position Status</td>
<td>Continuing</td>
</tr>
<tr>
<td>Employment Category</td>
<td>Operational FT</td>
</tr>
<tr>
<td>FLSA Status</td>
<td>Non-Exempt</td>
</tr>
</tbody>
</table>

These fields will need to be completed.

- **Date to Run**
- **Search is open to the following:**
  - [ ] W&M Employment Website
  - [ ] Chronicle of Higher Ed (DC)
  - [ ] Daily Press (Newport News)
  - [ ] Richmond Times Dispatch
  - [ ] Virginia Gazette
  - [ ] Washington Post
  - [ ] Graystone Group
  - [ ] Other (Please specify below)

- **Media Advertising**
  - [ ] can't be blank

- **Additional Advertising Sources**
  - [ ] can't be blank

- **Quick Link**

The Quick Link can be provided directly to an applicant providing them direct access to this posting in situations when it will not be published on our website.

Select **Save** then **Next>>** to continue.
# Recommendations Tab

Fill out this form if you want to request Reference Letters to be submitted directly through the secure portal. This must be completed along with the settings page information you previously completed.

![Recommendation and Requests Form](image)

- **Will this position accept reference letters?**
  - Yes

- **Minimum Number of Requests:**
  - Please enter the minimum number of reference letters that may be submitted
  - 0

- **Maximum Number of Requests:**
  - Please enter the maximum number of reference letters that may be submitted

- **Assigned Cutoff Date:**
  - Please enter the last date that reference letters can be submitted

- **Email Reminder Days:**
  - The number of days between each email reminder
  - 14

- **Instructions to Reference Provider:**
  - Include additional instructions to reference providers

If using the Assigned Cutoff Date, keep in mind the timeframe you intend to keep the position open to allow references to have access.

Instructions will appear at the end of the system generated email sent to the referee.

Select [Next>>](#) to continue.
Supplemental Questions Tab

Supplemental Questions can assist in screening and ranking your applicant pool. These questions can help the applicant qualify or disqualify their own knowledge, skills and abilities.

To add a question select

Add a question
Supplemental Questions Tab
(continued)

Click on the category to search for available questions or search by Keyword.

If you can’t find a question select “Add a new one”
To Create a Supplemental Question

Enter a Name for the item. This is the label that is presented when any user selects this type of question. The Name should be the same as the Question text.

Select the appropriate Category if available.
To Create a Supplemental Question (continued)

Create the question and select the type of Possible Answers.

Open-Ended Answers give applicants a free-text field for answering the question.

Predefined Answers give applicants a yes/no or multiple choice question for answering.
Sample Supplemental Question

Questions defined here will be "pending" approval and will not be available for use in other areas of the system until they have been approved.

Name *

Category

Knowledge

What is your knowledge of generally accepted accounting or budgeting principles?

Possible Answers

© Open Ended Answers

Predefined Answers

Empty answers will be excluded. Click and drag possible answers to reorder them.

Possible Answer 1: Basic

Possible Answer 2: Intermediate

Possible Answer 3: Advanced

Possible Answer 4: None
Sample Supplemental Question (continued)

The question you just created will appear as “pending”. You need to indicate if this question will be required to be answered by the applicants by checking the box under “Required”.

To Assign Points or Disqualifying Responses: Click on the question for a dropdown menu to appear. Instructions are provided for each step which is highlighted in this example in blue.

Assign the appropriate points and disqualifying responses before clicking on Save.

Note: Questions will remain in a pending status until reviewed and approved by Employment. This question will be added to the Library available to all Hiring Officials.
Guest User Tab

To create a Guest User select Guest User button.

On this screen the Username is created by the system as well as the password.

You are able to change the password.

Password

You can also notify the members of the review committee by adding their email address.

The Update Guest User must be selected for this to be activated.

When finished select the button to continue.
Applicant Documents Tab

Applicant Documents can be included by selecting “Included?” but to require the documents both “Included?” and “Required?” must be selected.

You can “drag and drop” the documents to re-order after making your selections.

Select [Save] [Prev] [Next] to continue.
Search and Selection Plan

Staff Searches:

Provide the Names and Titles of your Interview Panel Members.

Professional Searches:

Provide Name, rank/position, ethnicity, gender, veteran or disability status for Search Committee Members.

Provide the Policy on Quorum
Decision-making procedures
Criteria used in evaluating applicants
Search and Selection Plan
(continued)

Professional Searches: (continued)

Search and Selection Plan

| List names of other institutions/laboratories/list serves/programs to be notified of vacancy: |
|                                                                                           |

| List dates and names of recruiters attending major professional meetings and conferences: |
|                                                                                           |

Select to continue.
**Internal Documents Tab**

If an Internal Document listed is appropriate for your search, please hover over the button next to the document type.

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Name</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Advertisement Copy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search Waiver/Modification Request</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following drop down choices will appear for you to select.

- Upload New
- Create New
- Choose Existing

If you select **Upload New**, this will allow you to upload a document by browsing for that file to be uploaded and then select submit then confirm.
If you select **Create New**, this will allow you to write the document using the system format editor. Once you are finished select Submit then Confirm.

If you select **Choose Existing**, this will allow you to select a document that was previously attached by selecting the document, then Submit then Confirm.

Your Previously Uploaded Documents

There are no documents in this list.
Ranking Criteria Tab

Ranking Criteria is a feature used in combination with the Search Committee Tab. Ranking Criteria allow interviewers to provide subjective assessments of applicants on specific items at specific points in the workflow or recruitment process.

To access the list of ranking criteria click on “Add a Criterion”.

Ranking Criteria Tab
(continued)

You can click on the category to search for available criteria or search by Keyword.

If you can't find the one you want select “Add a new one”
To Create a New Ranking Criteria

Enter a Name for the item. This is the label that is presented when any user selects criteria. The Name should be the same as the Label.
To Create a New Ranking Criteria (continued)

Select the appropriate Category if available and Possible Answer type of either Open Ended or Predefined.

Open-Ended Answers give applicants a free-text field for answering the question.

Predefined Answers give applicants a yes/no or multiple choice question for answering.
Sample Ranking Criteria

Add a Ranking Criterion

- Name: Overall presentation of skills & knowledge.
- Label: Overall presentation of skills & knowledge.
- Category: Please select a category
- Description: Please evaluate the candidate's overall presentation during the interview of their skills & knowledge.

Possible Answers

- Open Ended Answers
- Predefined Answers

Empty answers will be excluded. Click and drag possible answers to reorder them.

Possible Answer 1: Poor
Possible Answer 2: Fair
Possible Answer 3: Satisfactory
Possible Answer 4: Good
Possible Answer 5: Excellent
Possible Answer 6: 
### Sample Ranking Criteria (continued)

To Assign Points or a Weight: Click on the question for a dropdown menu to appear.

<table>
<thead>
<tr>
<th>Included Evaluative Criteria</th>
<th>Description</th>
<th>Weight</th>
<th>Workflow State</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Uncategorized</strong></td>
<td>Please evaluate the candidate's overall presentation during the interview of their skills &amp; knowledge.</td>
<td></td>
<td>Draft</td>
<td>pending</td>
</tr>
</tbody>
</table>

**Possible Rankings**
- Poor
- Fair
- Satisfactory
- Good
- Excellent

Assign the appropriate points and weight before clicking on **Save**

**Note:** Criteria will remain in a pending status until reviewed and approved by Employment. This criterion will be added to the Library available to all Hiring Officials.
Search Committee Member Tab

The Search Committee feature works with the Ranking Criteria tab. To provide a member of your Search Committee access to this posting to complete the ranking criterion for candidates, they must have a “Search Committee” user status and be linked to your posting.

Note: Search Committee Members are assigned per posting. If an employee is selected as Search Committee Member to three separate postings, the employee must be linked or assigned to each of the three postings individually by the creator of the posting.

Select to continue.
Search Committee Member Tab
(continued)

After searching to find if your Committee Member has this user status, you find that Panel Member 1 and Panel Member 2 have the user status of Committee Member, simply click on “Add Member”.

To select a member as the Committee Chair, click on the box. A Committee Chair is able to view each Committee Member’s evaluations and you can choose multiple members as the Chair.

Select to continue.
Summary Tab

The Summary Tab provides the opportunity to review the posting request and make any changes before submitting to Employment.

This section provides information on the Posting such as Type of Position, Department, who created it and the Owner of the posting at this point.

This section allows you to decide what action to take.
Summary Tab
(continued)

After selecting to Move to Employment a Comment Box appears allowing you to provide comments. Please keep in mind these comments will appear in the email sent to Employment and will become a permanent part of the recruitment file and cannot be removed.

Information regarding the posting will appear at the top such as:

Posting was successfully transitioned