PeopleAdmin
User Guide
For Postdoc Searches

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Equal Opportunity Procedural Checklist

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INTRODUCTION

Welcome to the IU School of Medicine Faculty and Other Academics Applicant Tracking System. The Office of Faculty Affairs and Professional Development has implemented this system in order to automate the academic job posting, application, interview, and offer processes and approvals.

You will use this system to complete these tasks:

1) Create Postings
2) View Applicants

Throughout these processes, you will be able to communicate electronically with IUPUI and IUSM administrators, applicants, and others involved in your hiring process.

PeopleAdmin SelectSuite® supports the following browsers:

- Chrome (self-updating)
- Firefox versions currently supported by the vendor
- Internet Explorer version 9 and later
- Safari versions currently supported by the vendor

When an issue arises with a supported browser version, PeopleAdmin will consider fixing it in an upcoming release. Issues related to browser versions that are no longer supported will not be addressed.

The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

Security of Applicant Data:

To ensure the security of the data provided by applicants, the system will automatically log you out after 60 minutes if it detects no activity. However, anytime you leave your computer we strongly recommend that you save any work in progress and log out of the system by clicking on the logout link located on the bottom left side of your screen.
GETTING STARTED

After entering the URL [https://indiana.peopleadmin.com/hr/](https://indiana.peopleadmin.com/hr/) the “login screen” for the system will appear and should be similar to the following screen:

![Login Screen]

You will need to click the single sign on option (circled at the top and bottom of the screenshot) to be routed through CAS authentication.

The Welcome Screen appears after you log in, and should appear similar to the following screen:

![Welcome Screen]

This page is a dashboard to help you keep track of actions and postings:

- Items in your Inbox require your attention.
- Items on your Watch List are things you have selected to keep an eye on during the approval process.
Creating a New Posting

On the home page, make sure to select “IUSM Initiator” from the “Current Group” drop down. Only IUSM Initiators can create new postings.

Click the “Create New School of Medicine Posting” under the home page’s shortcuts menu.

Entering Posting Information

You will be prompted to select from the following:

- Create from Position Type: this means create from scratch
- Create from Posting: this means create from a previous PeopleAdmin posting. Only postings previously created in PeopleAdmin will be available, so if this is your first time posting the job in PeopleAdmin, you will choose “Create from Position Type.”

TIP: Fields with an asterisk (*) are required, so if you do not include information in the field, an error message will appear and you will be required to complete it.
Once the posting type is selected, the New Posting page will appear. On this page you will input:

1) Title – you may use a descriptive title, but the School Approver may edit for clarity or accuracy
2) Department – this is a drop down list in alpha order. If you are initiating for a division, each division is listed under the department (e.g. IUSM – Medicine – Cardiology)
3) Applicant Workflow – the default is to place applicants in the Application Received workflow. If you would like to receive email notifications each time someone applies to the position, choose Application Received with Email instead.

Note: this will turn on notifications for all users with the IUSM Initiator role for your department. If you have initiators in your department that do not wish to receive these emails, they can opt out of them in the ‘Manage Emails’ section of their profile.

4) References – optional. We recommend not requesting references at time of application

Once complete, click the orange Create New Posting button. Next you will add detailed posting information on the Posting Details page. Certain fields you enter on this screen will appear on the applicant site exactly as you enter it on this screen, so please proofread carefully.
Posting to HERC

The Higher Education Recruitment Consortium (HERC) is a non-profit consortium of over 700 colleges, universities, hospitals, research labs, government agencies, and related non- and for-profit organizations. Consortium members share a commitment to hiring the most diverse and talented faculty, staff, and executives.

We have partnered with HERC to automatically post our faculty positions to a number of national job boards at no cost to your department. To add a position to HERC, follow the steps below.

1. Create posting as normal.
2. In the Post to HERC dropdown, choose yes.
3. Check the boxes for HERC categories you would like your position to post to.

Note: If you choose not to post your position to HERC, you will need to choose ‘Don’t Send to HERC’ in the Category field.
Adding Screening Questions

Screening Questions are individual questions that can be used to qualify/disqualify candidates, or rank applicants based upon a score. You may create those questions in this section.

If you are not adding any Screening Questions, click the Next button.
To add a Screening Question to this Requisition, click on the Add a Question button, which returns the following page.

The first step is to search existing questions. You can enter a keyword to search the question text. The system will return a list of all questions that have been entered previously. Select one of the questions from the list if it is appropriate for this Requisition.
If you do not find an applicable sample question from the list, you may create a question from scratch by clicking on the Add a New One link at the bottom of the Search Results screen. Only the IUB system administrator will be able to change the status of question; all other user groups will have their question in a “Pending” status awaiting system administrator approval.

To add a new question:

1) Enter the information you wish to ask all candidates who apply to this Posting. 
2) Select either Open Ended or Predefined Answers: 
   a. Closed Ended questions require a multiple-choice answer. For example: 
      *Do you have experience working in an office environment?*
      Possible Responses: Yes or No
   b. Open Ended questions do NOT require a multiple-choice answer. For example: 
      *Describe any work experience relevant to this position.*
3) Click Submit at the bottom of the screen..
From this screen you may continue to add more questions by clicking the **Add a Question** button. You may also delete a question by clicking the x next to the relevant question.

You can **Require** an applicant to provide an answer to the question you added. The applicant will not be allowed to proceed without answering a question with the “Required” status. To require the question, check the required box.

When you have finished adding screening questions for this Requisition, click the **Next** button.

**Documents Needed to Apply**

On this screen, you will designate the documents that will be necessary for applicants to apply to this posting. You can make this determination on a posting by posting basis. If a document is optional, select the Optional radio button; if it is required, select the Required radio button.
Posting Documents

For Postdoc jobs, none of the items on this page are required.

Search Committee Members

While a search committee is not required for Postdoc searches, the PI or Hiring Authority should be added to the committee in order to review applications.

1) Click “Add Existing User” and type in the name of the user you wish to add.
2) Committee members who are not in the system can be added manually by clicking “Add New User.”

Review Posting
After adding additional reference details if applicable, the system will then bring you to a summary page where you can review the posting and take the following actions:

1) If you need to make changes, click “Edit” next to the posting title or in posting details. IUSM approvers are screening for contact person for questions, minimum qualifications like credentials, and inclusive/exclusive ad language.

2) If you are ready to send it for approval, click the orange “Take Action on Posting” and Send to Department Approver for Anesthesia, Medicine and Pediatrics or For All Other Departments Send to School Approver.

Once the position has received approval, it will be posted and you will receive a notification.

**Edit a Posted Position**

Sometimes you will need to make an edit to a position that has already been posted. Some examples include:

- Changing the priority application deadline
- Updating which materials are required for application
- Spelling and grammar edits

These changes will not cause the position to be re-routed for approval and will be live on the website once you have completed the following steps.

⭐ Note: this option should not be used to change posting details in order to accommodate a hire type not included in the original posting. For example – you may not use this method to change the track from Postdoc to Research Assistant in order to appoint a candidate that does not meet the original requirements of the position. If you have questions about this, please contact Liz Whitaker at whitakea@iu.edu.

1. Select the ‘Postings’ tab from the navigation pane at the top of the screen.
2. Click on the title of the position you would like to edit.
3. Click ‘Edit’ next to Posting Details.
4. Make the necessary edits and click **Save**.
5. When all edits are complete, navigate back to the summary page from the menu on the left.

6. From , select ‘Publish changes for this posting to the Applicant Portal’.

7. In the popup comment box that appears, outline what changes you have made and click .
Applicant Management

There is no pre-review of applicants to ensure they meet minimum qualifications performed at the school level (like there is in the Staff version of PeopleAdmin), so all applicants for a position will be available in the ‘Applicants’ tab for each position. The only exception to this is when an initiator includes screening questions on the application and applicants do not provide the acceptable response.

While not required, we hope that you will move applicants in the workflow to indicate their status. This provides us with good data and in some cases provides applicants updates on the search automatically.

Reviewing Applicants

1. Select the ‘Postings’ tab from the navigation pane at the top of the screen.
2. Search for/locate the posting for which you need to review applicants. Hover over and select View Applicants from the drop down.

To view an applicant’s documents one at a time

1. Locate the applicant of interest from the complete list of applicants on the posting.
2. Select the document of interest.

To view one applicant’s application materials as a single file

1. From the ‘Applicants’ tab on the posting, click More Search Options.
2. From the ‘Add Column’ dropdown menu, choose ‘Combined Document’ and wait for the page to refresh with the new column.
3. Identify the applicant whose materials you would like to view and click Generate.
4. After the page refreshes, click View.

To view a collection of applicant documents

You can select and review more than one applicant document at a time.

1. From the ‘Applicants’ tab on the posting, check the boxes to select the applicants of interest.
2. Do one of these things:
   - To see the selected applicants’ materials together: From Actions, select ‘Download Applications as PDF’. In the dialog box, select the types of documents you want to view, then Submit.
- See the selected applicants' materials separately: From , select Create Document PDF per Applicant. The system creates a PDF containing all the documents that you request.

Important Note: each applicant will have a history and workflow status that is independent from those associated with the posting.

Workflow State Types

Pre-interview Options

System Screened (Supplemental Questions) – if your posting includes Supplemental Questions and you have selected to have those questions screen candidates, applicants who do not select the desired option will be automatically moved to this workflow state.

Review List - use this option if the pool is going to be narrowed before committee review.

Basic Qualifications Not Met – move the candidates not being forward to the committee for review to this workflow state.

Select for Interview, OEO Review – move any candidates that the committee chooses to interview into this workflow state. This option not used for Postdoc positions.

Not Interviewed, Not Selected – use this for applicants reviewed by the committee, but not selected for an interview.

Withdrawn – if an applicant no longer wishes to be under consideration, move them to this workflow state.

*OEO ONLY* Approved for Next Steps – Upon approval of the applicant/interview pool, OEO will move the applicant to this workflow state.

Post-interview Options

Applicant Declined Interview – this is similar to withdrawn, but indicates that the withdrawal happened after receiving an interview invitation.

Short List – these candidates have been interviewed and are still in the running.

Interviewed, Not Selected – applicants who have interviewed for, but are not being offered the position should be moved to this workflow state.

Request Reference Letters – move applicants to this workflow type if you required that applicants include a list of references on their application. If you chose this workflow state when setting up your posting, PeopleAdmin will automatically request letter from the individuals indicated on the application.
Interviewed, Ready to Submit Hiring Proposal – move the applicant that you would like to offer this position to into this workflow state.

Declined Offer – if the applicant declines the offer, move them to this workflow state.

Moving Applicants in the Workflow

Moving a Single Applicant
1. From the Applicants tab on the posting, click the name of the applicant you wish to view/move.
2. From the orange Take Action on Job Application drop down menu, select the desired workflow state.

Moving Multiple Applicants to the Same Workflow State

This is the suggested, but not only way to use this function.

1. From the Applicants tab on the posting, check the box next to the name of the applicants you wish to move.
2. From , select ‘Move in Workflow’.
3. From the Change for All Applicants drop down menu, select the workflow to move all candidates in the list to.
4. Save changes
Closing Postings

To close a posting once a candidate has been selected and hired:

1. Initiator moves all applicants to final workflow states (rejections for all but the successful candidate who will move to **Hired**).
2. Move the Posting to ‘Posting Filled’
Troubleshooting
Viewing Draft Applications for a Position

It may be helpful sometimes to know if anyone has started the application process for a position and not submitted.

1. Go to the posting and click ‘Applicants’.

2. Click ‘More Search Options’ and check the box next to ‘Draft?’. Then hit the ‘Search’ button.
3. You will now see a list of any applications that have been started for the position.

4. Select the applicant you would like to review. You will see their entries into the application along with the missing or incomplete items, which will be designated by ![-icon]

<table>
<thead>
<tr>
<th>Full Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
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<td>How do you know this reference?</td>
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<td>Email Link</td>
<td><a href="http://indiana.peopleadmin.com/ref/new/263836/d554a2b1ae62df10d183f44dd4832458b030">http://indiana.peopleadmin.com/ref/new/263836/d554a2b1ae62df10d183f44dd4832458b030</a></td>
</tr>
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</table>

**Certification**

This Application has not yet been certified and submitted.

**Required Documents**

<table>
<thead>
<tr>
<th>Document Type</th>
<th>Name</th>
<th>Conversion Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Curriculum Vitae</td>
<td>Curriculum Vitae 03-09-17 12:20:53 (600 KB)</td>
<td>PDF complete</td>
</tr>
<tr>
<td>Letter of Application</td>
<td>Letter of Application 03-10-17 12:14:36 (21.5 KB)</td>
<td>PDF complete</td>
</tr>
</tbody>
</table>
1. In the search area of the posting's applicants list, add the "Document Conversion Status" column to this search view to see whether any applicants have submitted documents that did not convert properly to PDF. If an applicant uploads a document that fails to convert to PDF, the application will need to be reactivated so the applicant can provide a new document. See Helping Users and Applicants in the Online Help for instructions.