# Academic Personnel Recruit

## USER MANUAL

Produced by UCIrvine's Office of Information Technology — January, 2015

### ABOUT RECRUIT

Faculty recruitment has long been a paper-intensive process, creating an unnecessary administrative burden both to increasingly over-assigned staff and faculty committees juggling multiple priorities. In 2011, the University of California selected UCI's AP Recruit system—used on that campus since 2006—for system-wide deployment at all ten UC campuses.

Recruit provides for secure online academic employment recruitment management, supporting the entire recruitment workflow from early approvals, opening recruitments, applications, reference gathering, reviewing by the search committee, and, finally, selecting a hired candidate. Reports are built-in to the system, providing for an easy way to create the reports that the University of California's Office of the President uses to ensure all campuses meet their requirements as equal opportunity employers. Recruit also ensures the security and integrity of all applicant, reference, and related recruitment data.

## How To Use This Manual

The purpose of this manual is to document RECRUIT's functionality in order to aid Recruit Administrators and for trainers to help other users of the system. Permission is granted to copy, distribute and/or modify this document for your educational use. Please refer to the UC Recruit Project Website at **http://sites.uci.edu/ucrecruit** for recent product updates that may not be included in this edition of the guide.

- UC Irvine's RECRUIT Development Team

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The use of a double asterisk (**) denotes an **internal UC San Diego process/function** and not a platform-wide use or function.

- UC San Diego Office of Academic Diversity and Equal Opportunity (OADEO)

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## What You Need to Know Before You Start

### Operating Systems & Browsers

**Recommended operating systems:**
Microsoft Windows (7, 8) and Apple Mac OS X 10+
Other: Recruit's responsive design is compatible with up-to-date mobile devices.
**Supported browsers:**
Automatic updates are always recommended to ensure a secure and modern browsing experience, as certain technologies may lead to a degraded or otherwise suboptimal browsing experience. Each of the latest browsers are supported along with backwards compatibility for one full version still supported by the vendor:

Google Chrome
Mozilla Firefox
Apple - Safari
Internet Explorer

### How to Log Into Recruit

To access Recruit you must have a UC San Diego Business Systems account, sometimes referred to as Single Sign On (SSO), UC San Diego's authentication system for the campus community. If you have never activated your SSO, instructions are available at — **http://blink.ucsd.edu/technology/network/access/#**

Log into to Recruit here — **http://apol-recruit.ucsd.edu/**

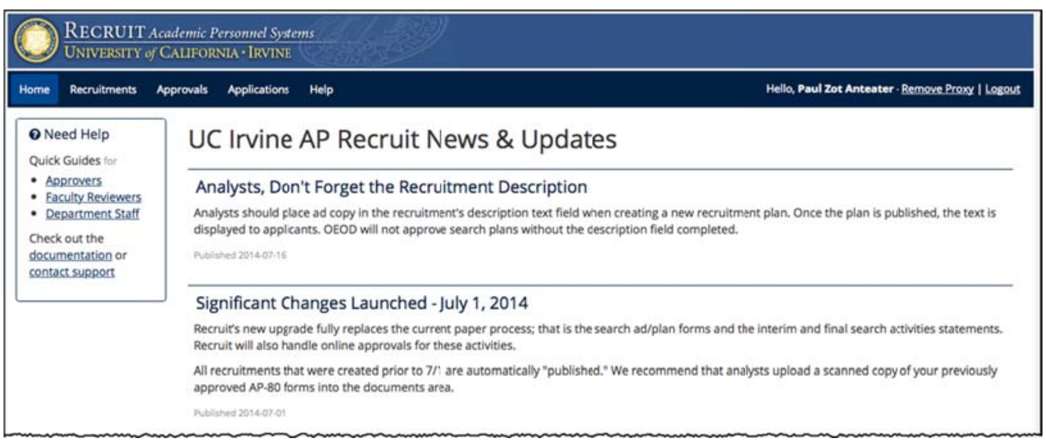
A link to Recruit is also available on UC San Diego's Academic Personnel homepage — **http://academicaffairs.ucsd.edu/aps/apol/index.html**

All trainees will use Recruit's training site at— **https://apol-recruit.ucsd.edu/training**

1. Click on “UC San Diego Faculty & Administrators.”
2. When prompted, authenticate with your UC San Diego SSO and password.


## The News & Updates Page

The Home page with news and updates is the same for all faculty and administrator roles.




All users know they are logged into Recruit by looking to the right on the menu bar. This is also how users log out of the system:


The top menu choices will differ depending on the user’s role in Recruit. For example, Analysts and Recruit Administrators will have the **Recruitments** menu while other users will not. If you only see News & Updates, you have not been assigned any role and should contact the Recruit technical support team, **acthelp@ucsd.edu.**.


## User Roles in Recruit

Recruit Administrators and User Managers are the primary supporters for end-users and they will manage most role assignments. *Committee chairs*, *editors*, *reviewers*, and *approvers* are assigned their roles on a recruitment-by-recruitment basis by the *department analyst* who is in charge of administering the recruitment.
**The role you are assigned in Recruit determines the tasks you can perform.**

**Recruit Administrators** are the primary supporters for all other users and have the most Admin tool access and all the access rights of the roles listed below.

**Recruit User Managers** act as gatekeepers, assigning, editing and removing user roles for others.

**Department Analysts** administer all aspects of the recruitment from start to finish. They create the recruitments for their departments, complete the search plan, publish the recruitment, assign search committee roles, manage the applicant files and generate reports.

**School Analysts** have the same access rights as the Department Analyst but on the School level.

**Committee Chairs** review the applicants. Chairs have slightly more access rights to the applicant pool than the committee reviewers. Chairs can review incomplete applications and can manage applicant files (although this is generally left to the Analyst).

**Committee Editors** have the same access rights as Chairs. Editors are generally staff and assist the department analyst in managing the applications.

**Search Committee Reviewers** have viewing rights to completed applications for a given recruitment and may comment on them and flag applicants.

**Equity Advisors** have access to view completed applications for a given recruitment and can create diversity reports. These roles are often part of the approval workflow for the search plan and reports.

**Central AP Analysts** have access to download a number of reports to provide to UCOP.

**Diversity Analysts** have viewing rights to completed applications for given recruitment. They may also view and create diversity analysis reports.

**Trainer** is a role that gives permission to create fake recruitments for use in the Recruit training site. This timesaving admin tool also creates a pool of fake applicants along with sample applicant files to help emulate the online application process.

**Approvers** are the newest roles in Recruit and are responsible for overseeing the Search Plan, Diversity Reports, and the final Search Report. Approvers are either system-assigned or assigned by analysts on a recruitment-by-recruitment basis. Listed below are the Approver titles that may be chosen for a workflow:

Committee Chair, Faculty Principal Investigator, Affirmative Action Reviewer, Department Chair, Department Director, Equity Advisor, Dean’s Analyst, Dean, University Librarian, Diversity Office, Central AP Office, Academic Senate, Budget Office, Vice Provost, Provost, Executive Vice Chancellor, Chancellor.

# Table of Contents

# Part 1: Recruitment Management

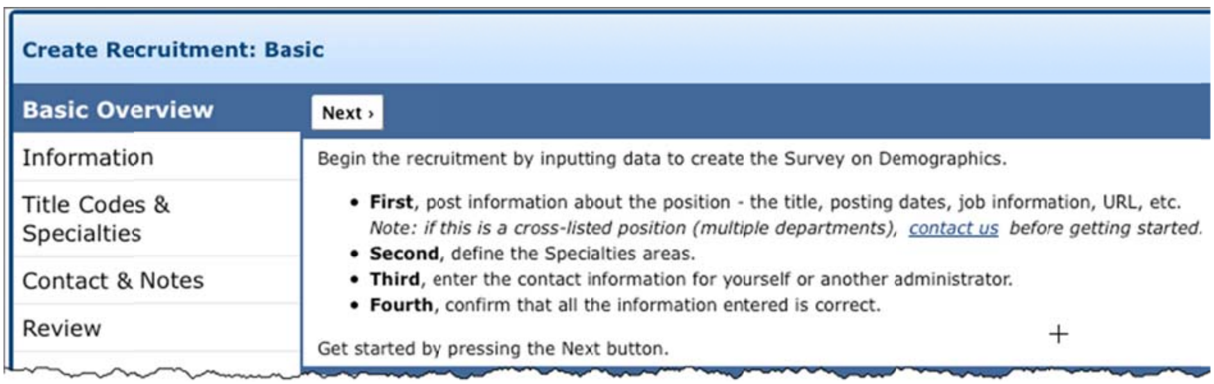
## Create the Basic Recruitment

The analyst begins by creating the *Basic* recruitment — inputting the position name, application submission dates, title codes, specialties, etc. This simultaneously builds the survey on diversity, an important component of Recruit.

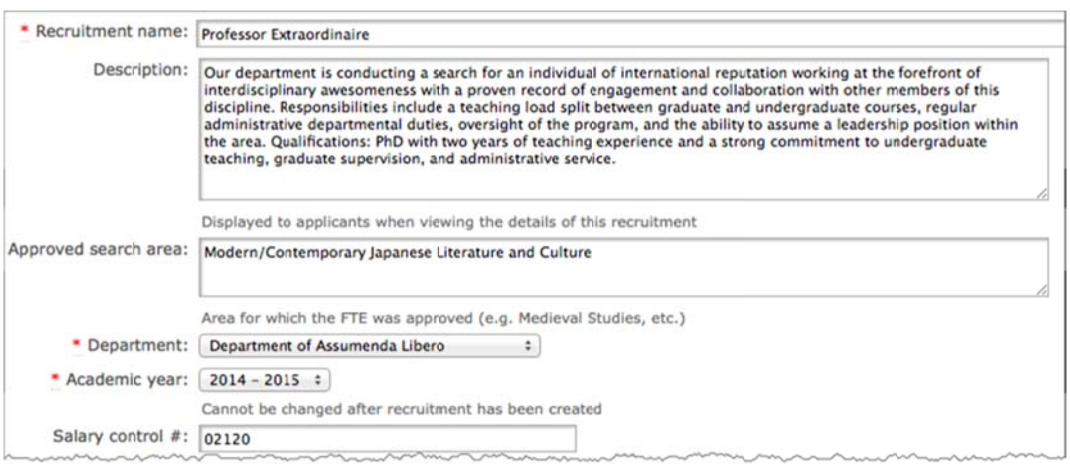
1. Click **Recruitments** in the top menu bar.


2. Click the button, **Create New Recruitment Plan**.


3. Read the Basic Overview page and then click the **Next** button.




4. Fill in the basic information about the recruitment:




- **Recruitment name:** Type in the name of the recruitment. This should match your ad. The name will help distinguish similar recruitments from each other. For example, you may want to hire multiple HS Clinical Professors and each position is specialty specific.  If each recruitment has an identifying name, you (and the applicants) will be able to distinguish the positions by the specialties. **The UC San Diego Office of Academic Diversity and Equal Opportunity requires the following naming convention with the inclusion of the e-Recruitment Plan Number: **10-XXX Position Title – Department/Area**(**)

- **Description:** Insert the ad text. This appears on the corresponding ad page for applicants. Your description text will also be used when posted to Higher Education Recruitment Consortium (HERC), Diverse Education / DiverseJobs.net, etc. Remember to include the *URL for Applicants* that the system will auto-assign. Then return to this section to add the URL for applicants once your recruitment is set up.

- **Approved search area:** Optional, editable field to document the area in which the FTE will be approved. (e.g. Medieval Studies)

- **Department:** Select your department from the drop-down menu. If this is a cross-listed position (multiple departments or schools), finish creating the recruitment and edit the department field afterward.

- **Academic year:** Refers to the academic year in which the search is conducted. This field is not editable, as it ties into reports. Contact the Recruit technical support team, acthelp@ucsd.edu if you make the wrong selection.

- **Salary control #:** This optional field may help you with tracking.

## Open/Closed/Final Recruitments vs. Pool Recruitments

**Open/Close/Final Recruitments —**are one-time searches that will complete when the vacant spot(s) are successfully filled. The most common type of recruitment. Easily editable.


**Open date:** (editable field )The anticipated date when applicants can begin applying.

**Close date:** (editable field )The date that no new applications will be accepted.

**Final date:** (editable field )The last date for existing applicants to modify their applications. Use this as an optional grace period, otherwise make it the same as the close date.

**IRD/ Open Until Filled** — a long-running search in which pools of applicants are gathered and evaluated separately at different times. When applicants apply to an IRD recruitment, they are told that they must complete before their review window closes in order to receive full consideration by the committee.


**Open date:** (editable field) The anticipated date when applicants can begin applying.

**Initial review date:** Marks the closing of the first pool of applicants. O*nce the recruitment is posted, the IRD cannot be changed —this is designed to keep the advertisement and submission dates in sync.*

**Review date** After the Initial review data has passed, subsequent review dates may be set. See next section, “Specifying Additional Review Dates”

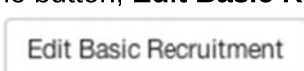
**Private date (checkbox)** Optionally add an internal review date that will not be shown to applicants.

**Final date:** The last date when applicants can apply. If you add an additional review date that is after the final date, the final date automatically moves forward to accommodate it.

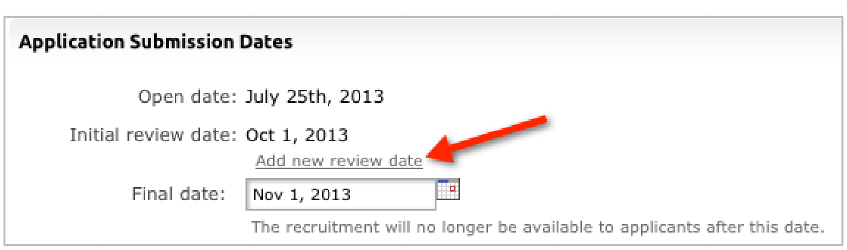
## Specifying Additional Review Dates (IRD Recruitments Only)

**Open Until Filled, or “IRD”** As you learned in the section above, these types of recruitments are an ongoing and collect pools of applicants separated by review dates. Once a review date has lapsed, analysts can then add additional review dates.

- Find the recruitment and click on the link, “Recruitment Details**”**.
- Click the button, **Edit Basic Recruitment**.




- In the **Application Submission Dates** field, click the link, “Add new review date.” If this link doesn’t show, then the initial review date has not lapsed and you will have to wait to specify additional review dates.



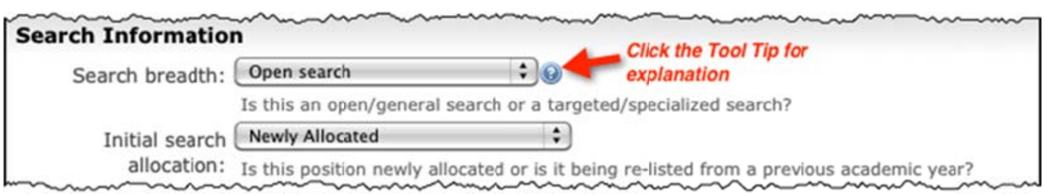

- Specify a new review date in the field provided. If you check the “Private date” box, the new review date will not be shown to applicants.


In the example shown above, the new review date will place any new applications completed by Oct 25, 2013 into the existing pool of applicants already in the review bin. Oct 25 acts as the last modification date for this new group of applicants and Recruit will automatically send reminders to applicants in this group about the last day to modify their applications. If they ignore the date and complete their application after Oct 25, they will be told on their application dashboard that they may not be reviewed or considered for the position.

- **Search Information**

After completing the dates section above, now complete the Search Information section:

1. Choose whether this position advertised broadly or specifically targeted.
2. Choose whether this recruitment is newly allocated or if it is being re-listed from a previous academic year. This is for UCOP and the need to analyze applicant diversity data.

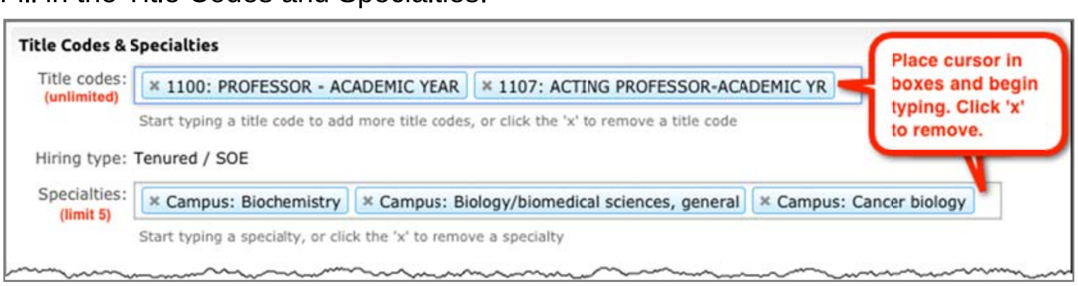



- **Optional Information Link**

Provide the URL if this recruitment is advertised on your school or department jobs website and Recruit will display the link to applicants when they apply.


5. When satisfied with the Information section, click the **Next** button.

6. Fill in the Title Codes and Specialties.



**Title Codes:** Start typing a title code in the box. You may also enter part of the code's name, for example, "Prof", and the system will provide a menu of title codes to select. There is no limit on the number of title codes. Click the 'x' to remove a title code.

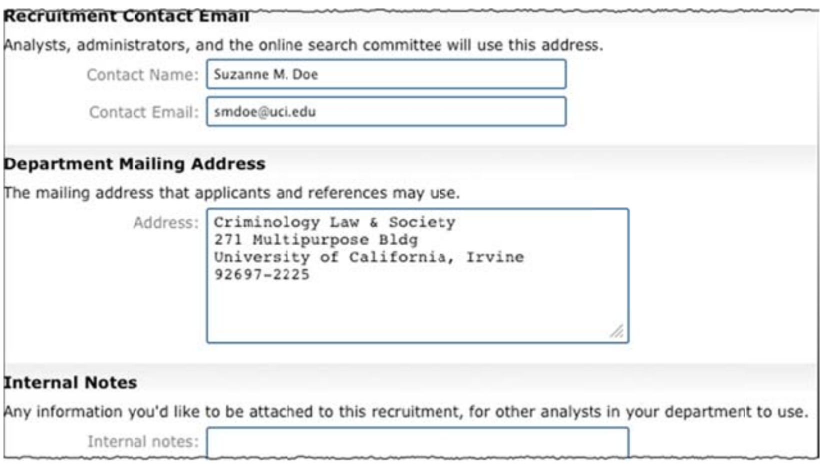
**Hiring Type**: This section is automatically filled in for you, based on the Title Code(s) chosen.

**Specialties:** The specialties are used when generating the diversity reports, a core feature of Recruit. All applicant pools must be compared against national averages, which is associated via the specialties. Start typing a specialty into the box. Recruit will present you with a list to select from. Add up to 5 specialties. Click the 'x' to remove a specialty.
**If you can't find a specialty needed:** Choose a more general category. This data originates from the Survey of Earned Doctorates (provided by NORC). Specialties with smaller numbers are purposely folded into larger ones.

7. Click the **Next** button.

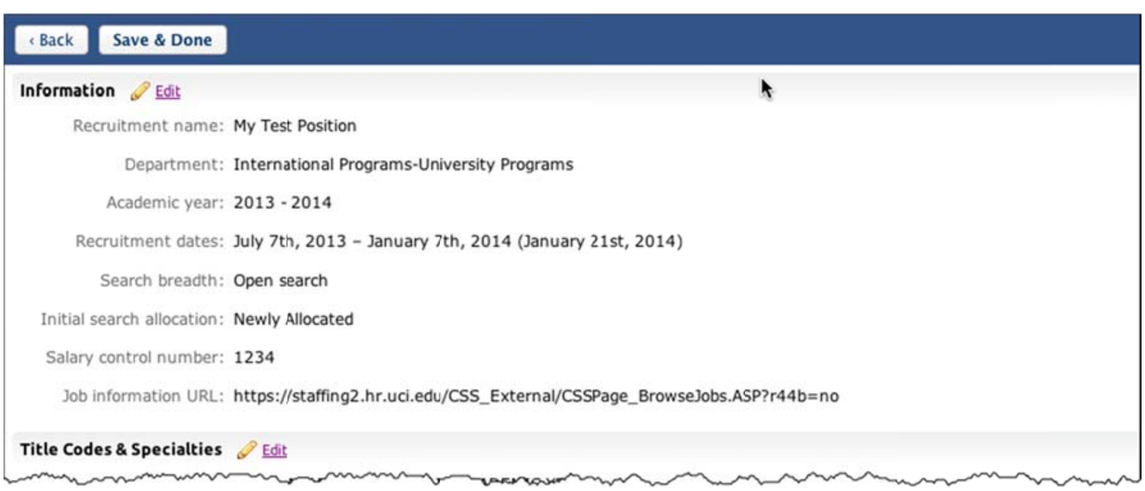
8. Complete the Contacts & Notes page.

**Contact Email & Department Mailing Address:** Complete your contact name and email address. Verify your department mailing address (shown to applicants).




9. **Internal Notes:** Use the Internal Notes field as you would a Post-It note on a paper file. Other analysts assigned to this recruitment can see your note.

10. Finally, look over the information for accuracy and click the **Save & Done** button.

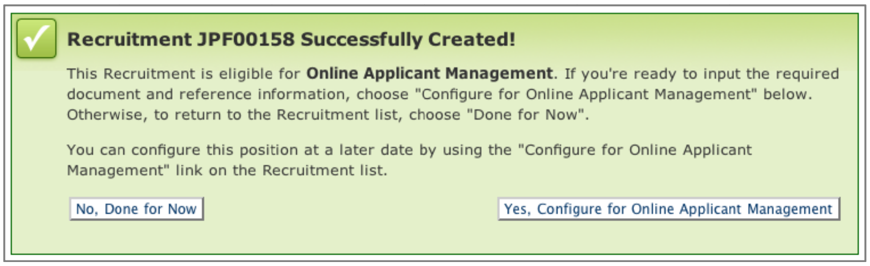


### Basic Recruitment Completed

The Basic recruitment is completed but you will need to configure it for applicants to apply online! All recruitments must be configured for Online Applicant Management.

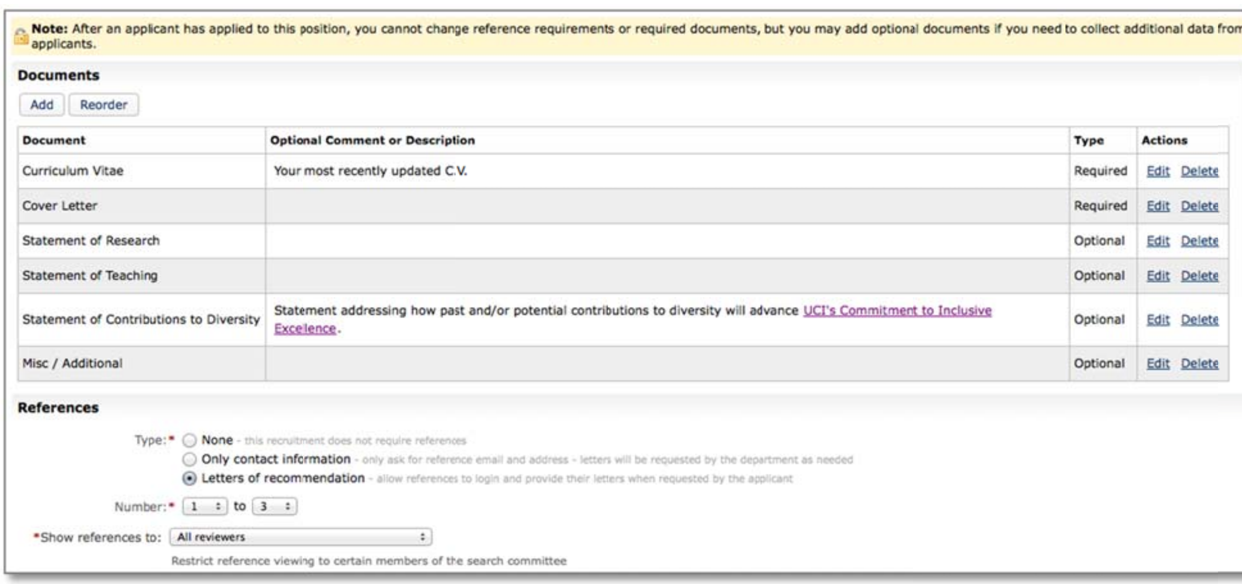
## Configure the Recruitment for Online Applications

After entering the basic recruitment information, click **Yes, Configure for Online Applicant Management** in the confirmation box:




1. Read the Online Overview page and click the **Next** button.

2. Define the required and optional documents, as well as the number and type of requested references.




**Documents Requirements.** Define the required or optional documents to be provided by the applicants. The applicants will see any description you decide to provide (204 characters limit). **Required Components can be found at the following link http://academicaffairs.ucsd.edu/aps/adeo/recruitment/procedures/ad-text.html**

**Add:** Define any additional documents, make them required or optional, and add a description.
**Reorder:** Adjust the order in which the requirements are listed for the applicants.
**Edit:** Change the name of a document, add a description, and switch it from required or optional.
**Delete:** Remove a document from the requirements.

***IMPORTANT:*** *Once the first applicant has applied, editing the requirements is purposely restricted! It will only be possible to add optional documents if you need to collect additional data from applicants. You have been warned!*

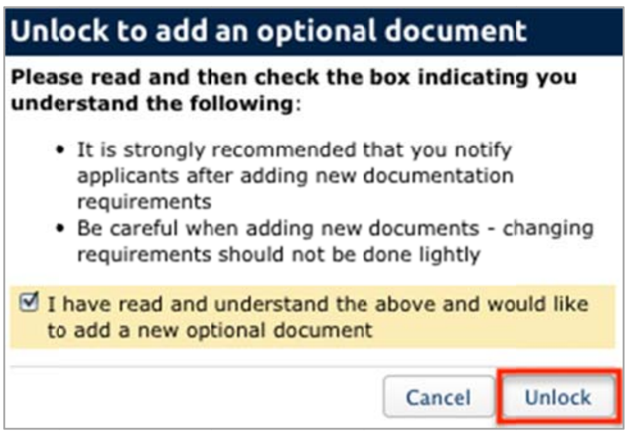
### Adding an Optional Document (after applicants have applied)

After your first applicant has applied, you can ***only*** *add* ***optional*** documents. The newly added document requirement cannot be edited/changed after being added.

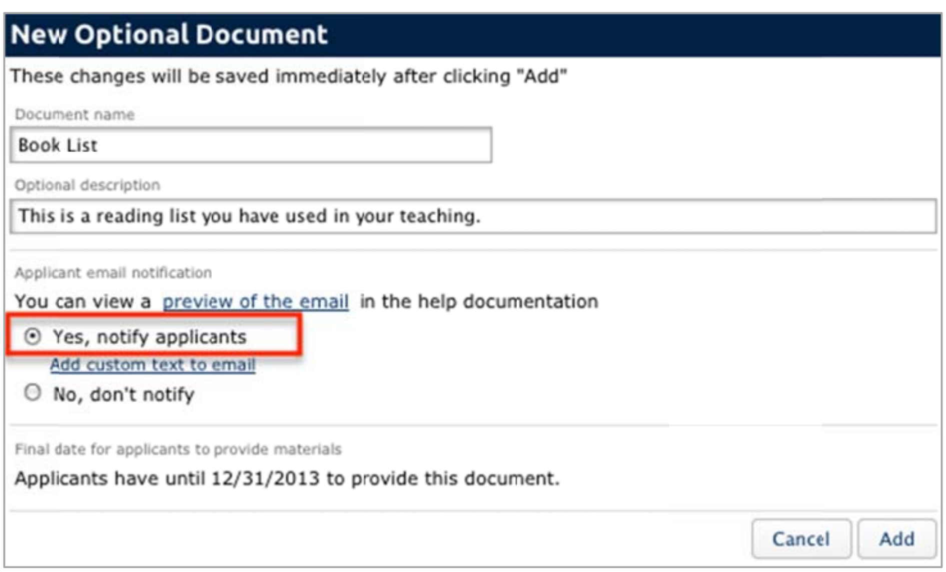
1. Find the recruitment and go to the **Recruitment Details** screen.
2. Click the button, **Update Online Applicant Requirements**.


3. Click the **Unlock** button  …and read the following warning:






4. Name the new document requirement and add a description. We strongly recommend that you send the email to applicants notifying applicants that a new document is needed. You may add custom text to the email template.



5. Click the **Add** button. The new document appears in the requirements list.

**References Requirements.** You may choose to have your applicants provide self-solicited reference letters OR reference contact information with their application OR nothing at all. The reference requirements cannot be changed once the first applicant applies.

**Type:** Choose None, Only contact information, or Letters of recommendation.

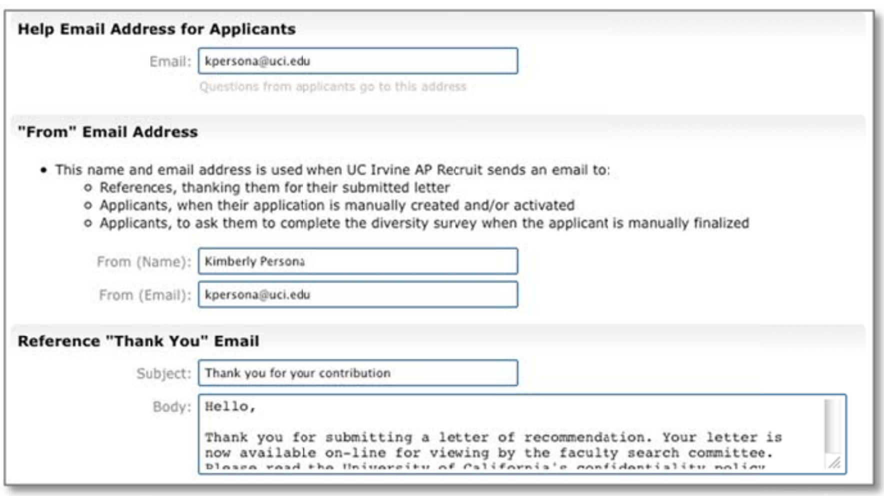
**Number:** For contact information or letters, choose the minimum-to-maximum range required.

**Search Committee Reference Viewing Rights:** You may restrict who sees contact information or letters to certain search committee members: (1) All reviewers, (2) Only faculty members, (3) Only assistant, associate & full professors, (4) Only associate & full professors, or (5) Only full professors. This flexibility is important if departments wish to exclude any graduate students who may be serving on their search committee.

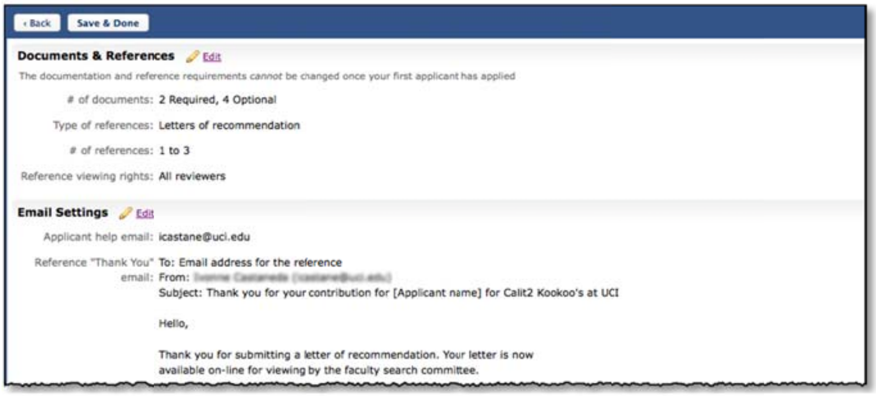
3. Click the **Next** button and complete the information on the next page:

**Help Email Address** is the address where questions from applicants will be directed. This address is also used in the "From" line in a number of other correspondences between the department, applicants, and references. Refer to the text on the screen for those specific situations.

**"Thank You" Email Sent to References** is a fully customizable template that Recruit sends to references after their letters of recommendation are uploaded into the system. *See Appendix B for the default wording of this email sent to References.*




4. Look over the information for accuracy and then click the **Save & Done** button. A green, success box appears next, alerting you of what to do next.

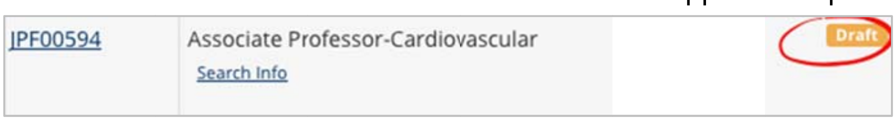




## Find and View Recruitments

1. Click the **Recruitments** in the top menu bar. Analysts will always find their recruitments listed here.


A new recruitment remains in a **Draft** state until it is approved & published. This is indicated by the icon.




Use the filter panel to fine-tune your list of recruitments:


**Submission Dates:** Check which recruitments you want displayed. By default, you will see all, regardless of the submission date status.

**Dates:** This filter displays all recruitments based on their open, close, or final dates.

**Academic Year:** This filter shows all your recruitments by their academic year. By default, the two most recent academic years will be checked.

**Recruitment Type:** Do you want to display only recruitments that have been configured for online applicants or only basic recruitments? By default, both will be checked.

**Hiring Type:** Decide whether you display recruitments with Tenured title codes or those without. By default, both are checked.

**Other:** Filter for those recruitments with applicants vs. those without. Or filter for all Inactive recruitments.

**Reset:** *Your recruitment filters stay the same on this page as you move throughout Recruit. Click Reset when necessary.*

### Other Tools to Find Recruitments

Use the toolbar at the top of the columns:


**Change Columns**. Add or reduce the information about the recruitments. Hint: Click directly on the column headers to sort the list.

**Download as CSV.** Recruit will create a comma-delimited file, "**recruitments-yyyymmdd.csv**" consisting of all the data within the columns on the page. Depending on your web browser, the file will: (1) open automatically in Excel, (2) go to a download directory on your computer, or (3) present a message asking you to either open or save the file.

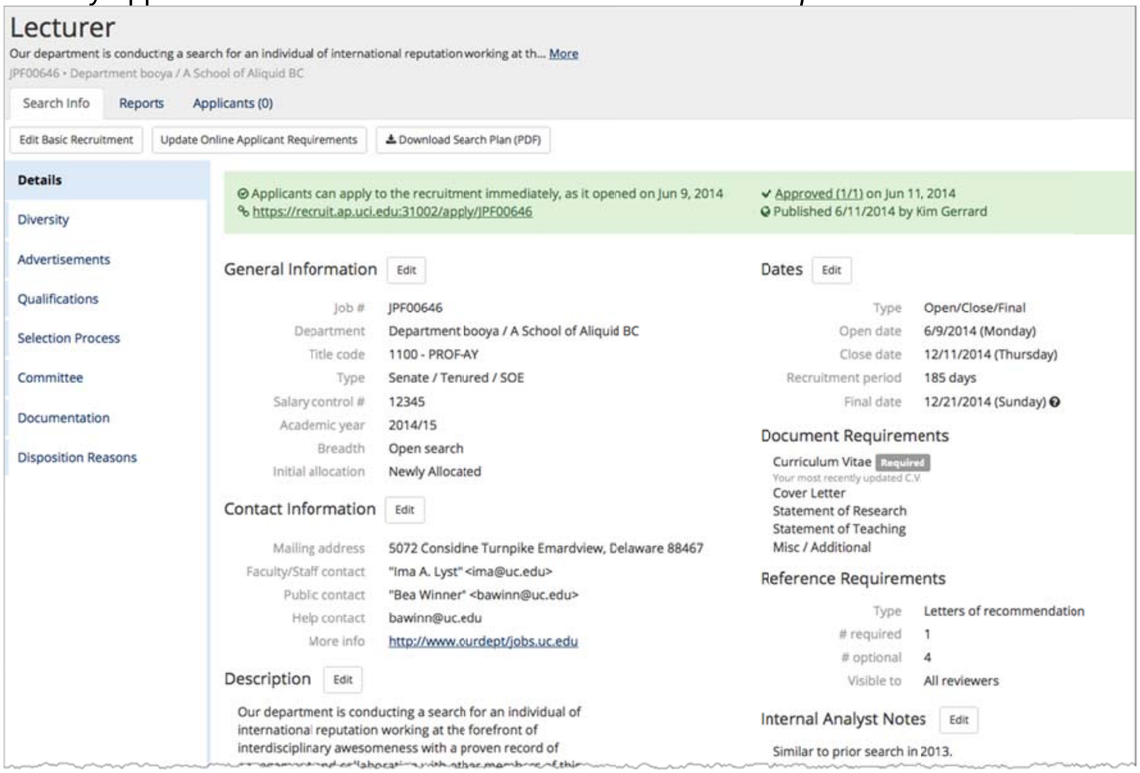
**Search**. Zero in on the Recruitment you are looking for by typing in a search word **or the eRP 10-XXX Number** and pressing return.

## Working with the Search Plan

Find your recruitment and click either the "Search Info" link or the Job number.


### Details

The Details section summarizes the recruitment. Other analysts, committee chairs, editors, reviewers, and any approver named in the search *Plan* and/or search *Report* can view this section.

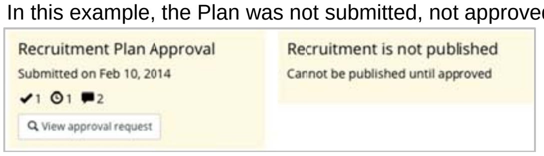



### The Details section includes:

**URL for Applicants:** A unique URL is revealed for all recruitments that have been configured for online applicants. Use this link for job ads, postings, electronic mailings, and links on other websites. OADEO requires the link in the text in the Description field.

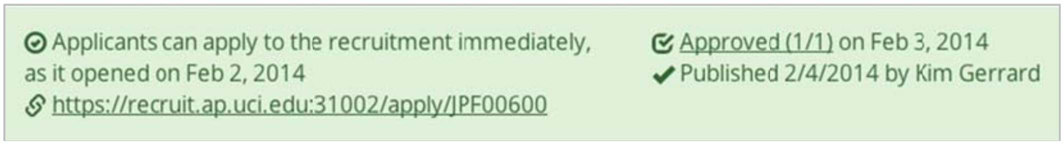
**The Status of the Plan:** Dynamically changing status boxes appear at the top of the Details screen. The following show various states for a recruitment.


In this example, the Plan was not submitted, not approved, and not published. Note that a specific URL has been assigned.



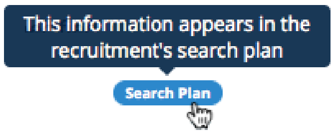

In this example, the Plan was submitted and waiting for approval(s). Not published.


In this example, the Plan was approved.  Ready to publish.



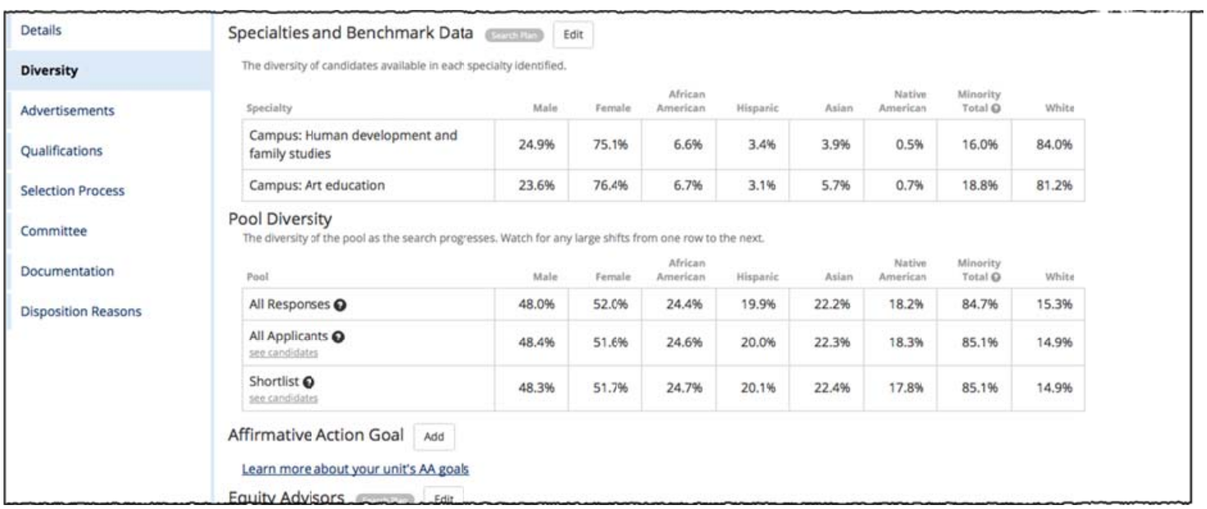

In this example the Plan was submitted, approved, and published! Applications are being accepted.

**Note:** All sections beyond *Details* display "badges." These are indicators telling you whether the information is part of the search ***Plan*** or search ***Report***. Roll over a badge with your mouse to reveal the helper text as shown here:




## Diversity

Committee chairs, editors, reviewers, and any approver named in the search *plan* can view this information but cannot edit it.

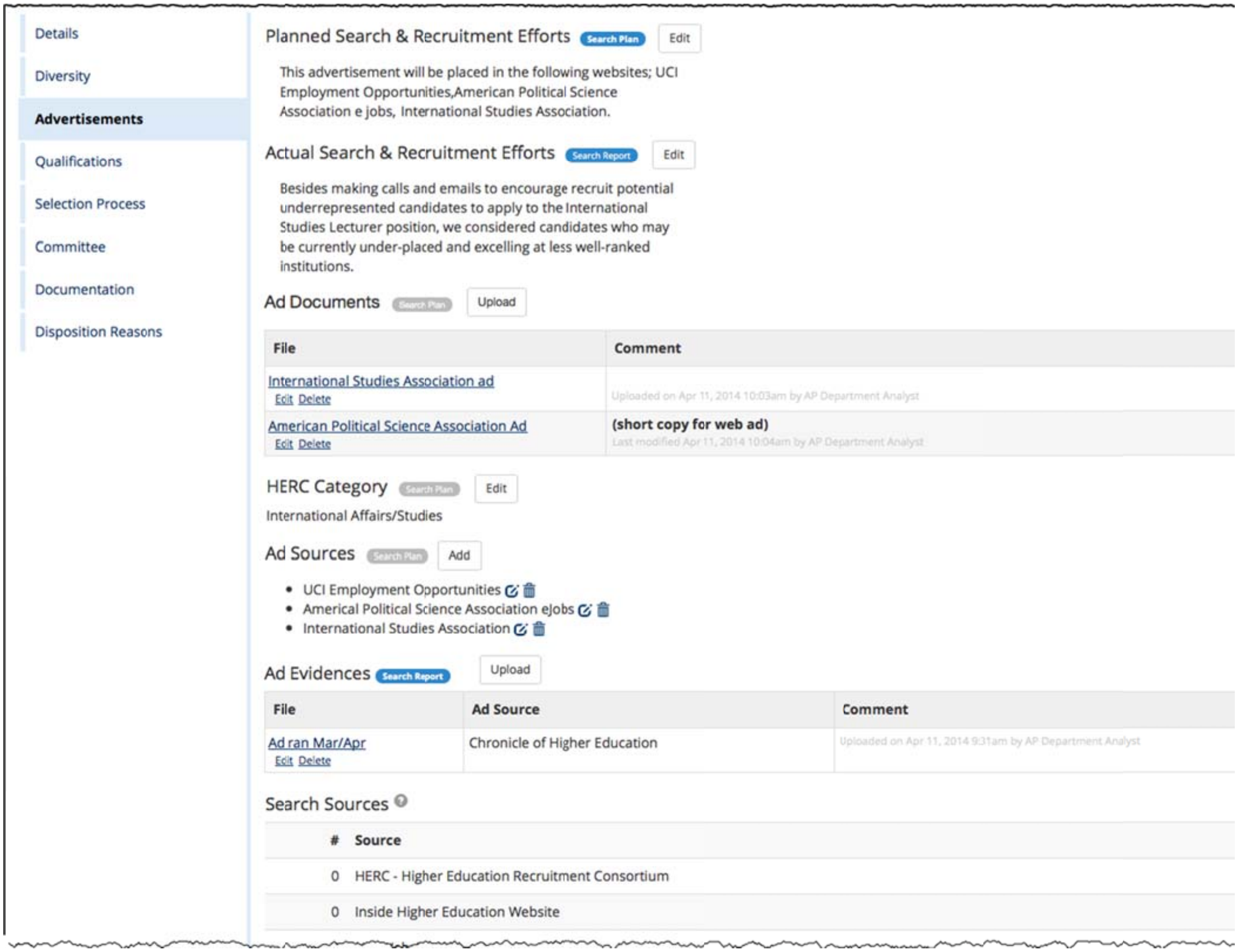



**The Diversity section includes:**

1. **Specialties and Benchmark Data:** lists the recruitment's specialties and the corresponding national availability data that is provided via the UC Office of the President to Recruit.
2. **Pool Diversity:** This table enables search committees charged with ensuring a diverse applicant pool to better perform that task. **Note:** When there are less than 5 responses to the first two rows, the percentages are suppressed. Equity Advisors, Diversity Analysts, and Recruit Admins have access to personally identifiable race and ethnicity via their "See candidates" link.
3. **Affirmative Action Goal:** Identify the affirmative action goal for the title series in the campus academic affirmative action plan by indicating which groups are underutilized on the campus for the specific job grouping.
4. **Equity Advisors:** The name(s) of the department and/or school Equity Advisor that has been designated by a Recruit administrator will appear here. If not designated, this area will be blank.
5. **Equity advisor role:** Use this field to write a description of the role the above stated equity advisor will play in this search.

## Advertisements

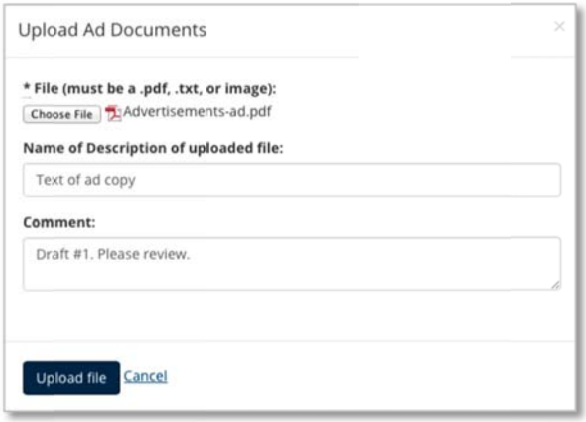
This section is for all documentation related to advertising. Approvers who are named in the search *plan* can view this information but cannot edit it.




**The Advertisement section includes:**

1. **Planned Search and Recruitment Efforts:** As part of the Search *plan*, describe all *planned* efforts to reach a broad and inclusive applicant pool. (Help caption is included in this field.)
2. **Actual Search & Recruitment Efforts: Return to this field later to enumerate all efforts taken to reach a broad and inclusive applicant pool. The information here will be included as part of the Search *report*. (Help caption is included in this field.)**
3. **Ad Documents: Upload your ad drafts and final ad copy here. Files must be a PDF, TXT, or an image. The comments field may be used in any way that may be helpful for your approvers.**

   **Navigate to your file on your computer, optionally add a comment, and click Upload file.**

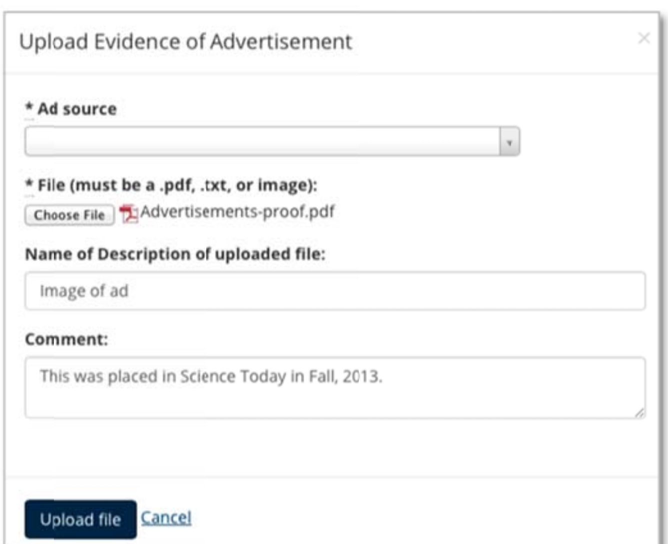



4. **HERC Categories:** Select which category and area of expertise best fits the recruitment from the list of choices. This selection ensures the best visibility for your job posting in HERC.

5. **Ad Sources:** Simply list the various places where your recruitment will be advertised.


6. **Ad Evidence:** Return to this area when you can provide proof that an advertisement was placed. For OFCCP (Federal audits), copies of actual ads will be needed. **Note:** The badge indicates this information will be included in the recruitment's search *report*.

   Choose your ad source from the drop-down menu. **Navigate to your file on your computer, optionally describe the file and add a comment if you want. Then click Upload file.**

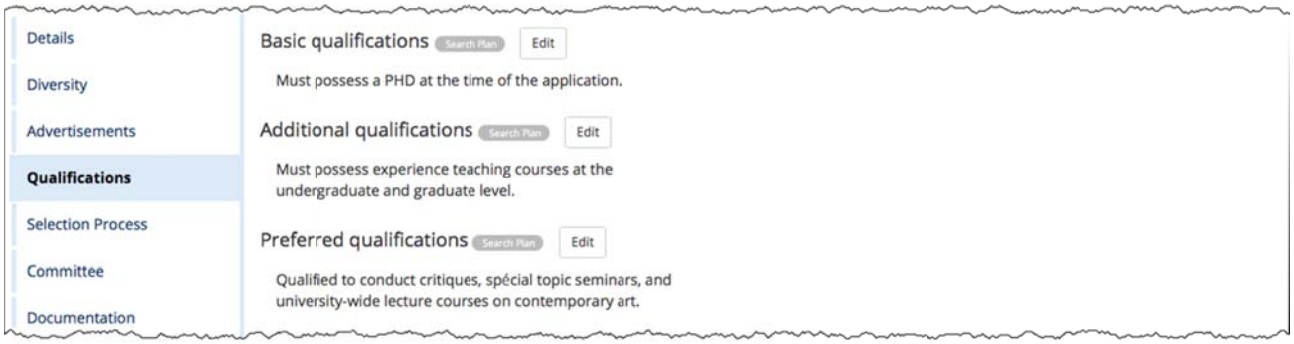



7. **Search Sources:** This hard-coded list corresponds to the choices on the applicants' diversity surveys. As applicants submit their surveys, the number of responses displayed here will

change dynamically, assisting you in your outreach efforts.

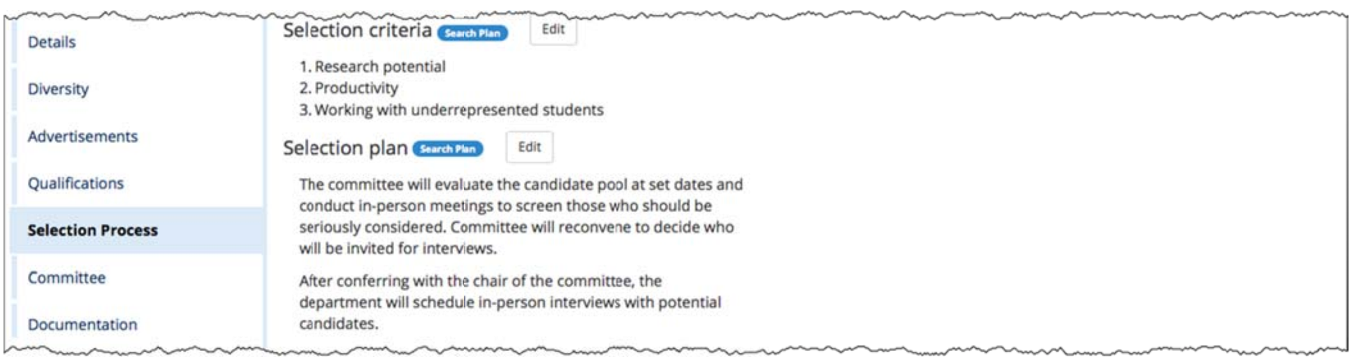
## Qualifications

This section is an area for analysts to document the basic qualifications, additional, and preferred qualifications along with the selection process for the search plan. Committee chairs, editors, reviewers, and any approver named in the search *plan* can view this information but cannot edit it.




## Selection Process

This section is for analysts to document the job related criteria and the committee's plan for the selection of candidates. This information can often be found within the position's description. Committee chairs, editors, reviewers, and any approver named in the search *plan* can view this information but cannot edit it.




**The Selection Process section includes:**

1. **Selection criteria:** This area is to provide a detailed description of the selection criteria to be used in evaluating candidates in priority order.

2. **Selection plan:** This is a free-form field to document how the search committee will evaluate the applicants and select the shortlist and finalist (screening process, interview procedures, role of the search committee, etc.

## Committee

Analysts assign committee roles on a recruitment-by-recruitment basis so when the members log into Recruit, they will have access to review the applications. Any committee member and any approver named in the search *plan* can view this section but cannot edit it.

### About the Committee Roles:

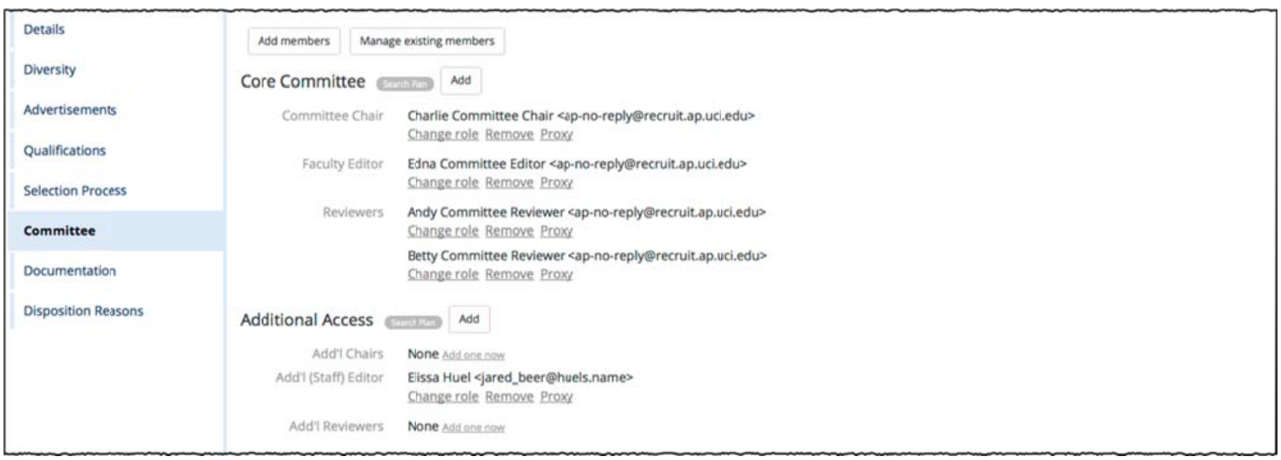
The designation between "Core" members and "Additional" members helps to satisfy annual reporting requirements for the Office of the President regarding applicant pools and search committee demographics. Identify the *core* committee as part of the Search plan.

- **Committee Chairs** will see all applicants, regardless of whether the applications are complete or not. Chairs have complete management rights to the applicant's files, although these tasks are generally left to the analyst and editor. **Add'l Chairs** may be added later (e.g. after plan approval) and will have the same access rights as their counterpart.
- **Faculty Editors** have the same access rights as committee chairs and are able to assist the analyst in managing the applications. **Add'l (Staff) Editors** may be added later (e.g. after plan approval) and will have the same access rights as their counterpart.
- **Reviewers** have read-only rights to *only* completed applications. **Add'l Reviewers** may be added later and will have the same access rights as their counterpart.

## Setting up the Search Committee—Quick Add

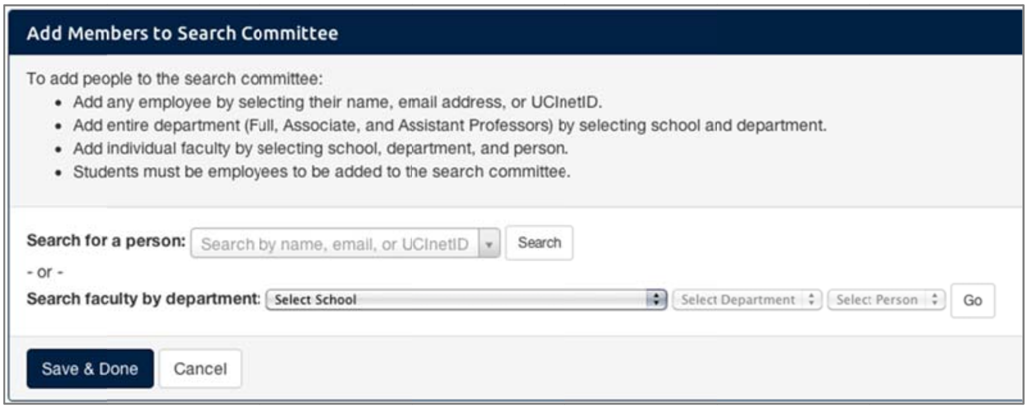
The **Add** button is a quick way to add members one at a time. Click the **Add** button in the Core Committee part of the page.

1. Choose a role and then start entering the person's first or last name, email address, or campus ID into the search box.
2. Click the Add Button after selecting a role and a finding a user.
3. The name will be added in the appropriate section.



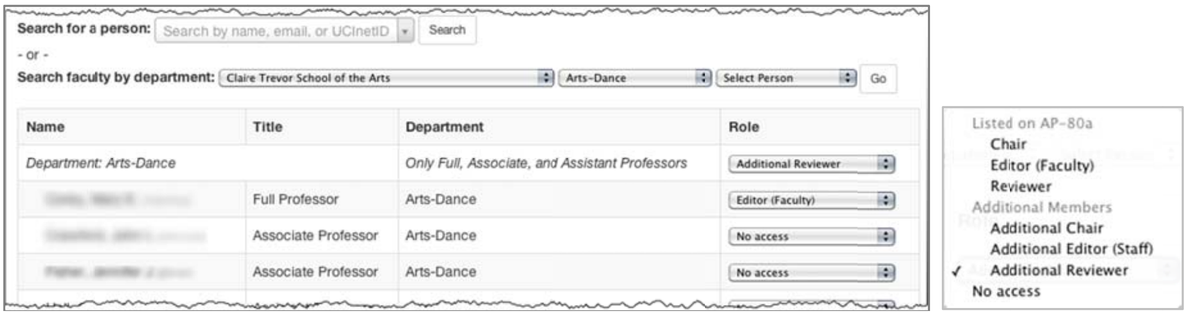

## Setting up the Search Committee – Adding members in bulk

1. To add members using an extended search click the **Add members** button. In this view, you can add faculty from entire Schools and Departments at once.




An extended search allows for quick assignment of all faculty roles by school/department.

2. Designate each person's role in the committee using the drop-down selector. Click **Save & Done** when finished.

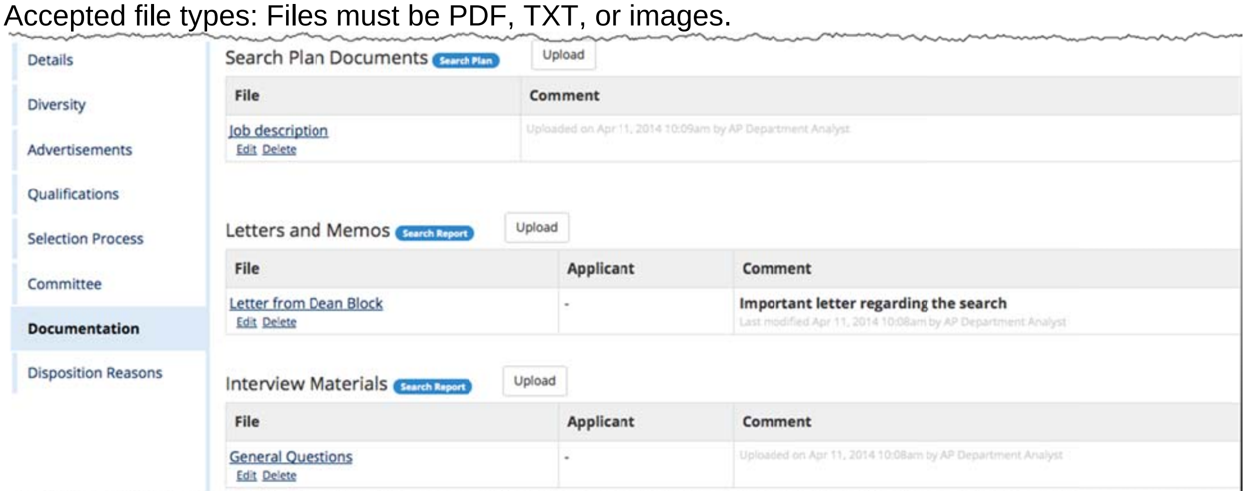



To edit, click "Change role" or "Remove" below the names OR click, **Manage existing members**.


## Documentation

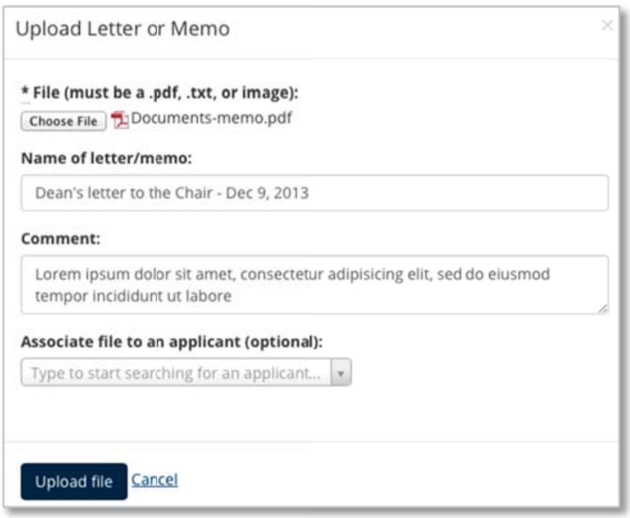
Archive and retrieve various materials associated with the recruitment. Approvers who are named in the search *plan and/or* can view this information but cannot edit it.

Accepted file types: Files must be PDF, TXT, or images.

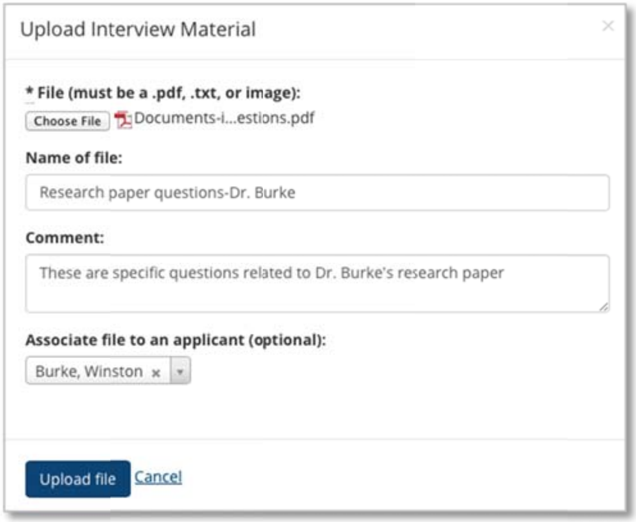


**The Documentation section includes:**

1. **Search Plan Documents:** Store any miscellaneous documents associated with the search that needs to be kept for the electronic record. As the badge indicates, this section will be included in the search *plan*.
2. **Letters & Memos:** The documents you upload here will be part of the permanent record and included in the final search report, viewable by any approver named.
   a. Click **Upload** and choose the file from your computer.
   b. Enter the name of the letter/memo.
   c. Add a comment if needed.
   d. Optionally associate the letter/memo with an applicant.
   e. Click **Upload File**.

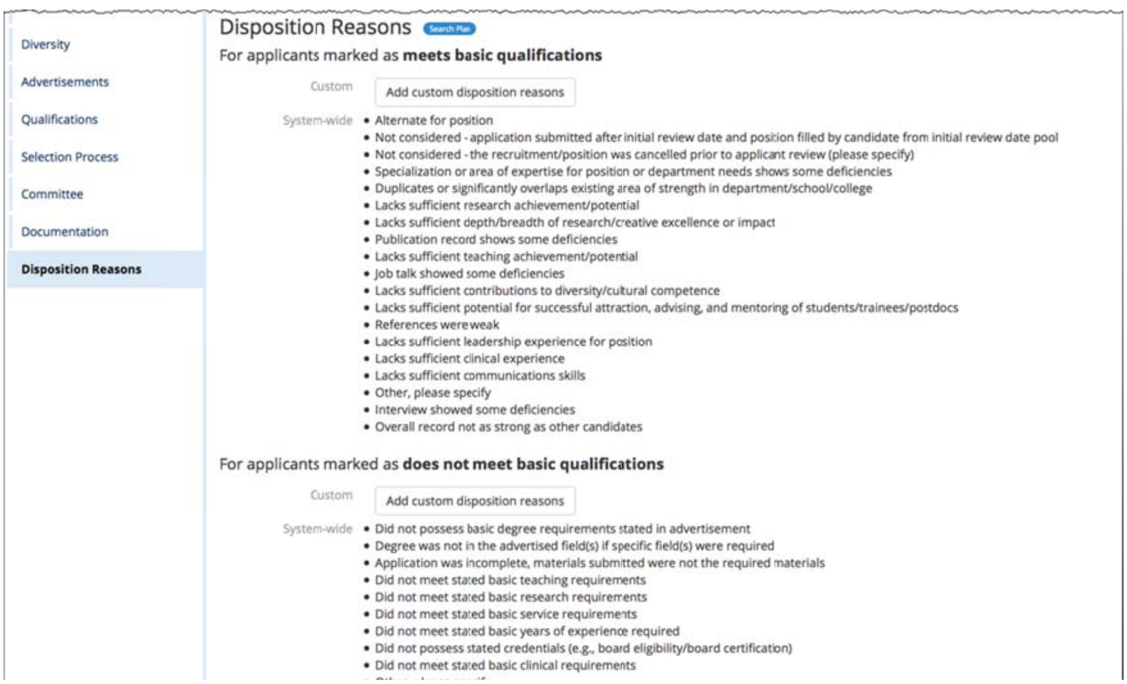



3. **Interview Materials:** Include materials such as: interview questions, committee notes from interviews, interview schedules for on-campus visits, notes about meetings, etc. The documents you upload here will be part of the permanent record and included in the final search report, viewable by any approver named.
   a. Click **Upload** and choose the file from your computer.
   b. Give the item a name.
   c. Add a comment if needed.
   d. Optionally associate the item with an applicant's name using the drop-down selector.
   e. Click **Upload File**.




## Disposition Reasons

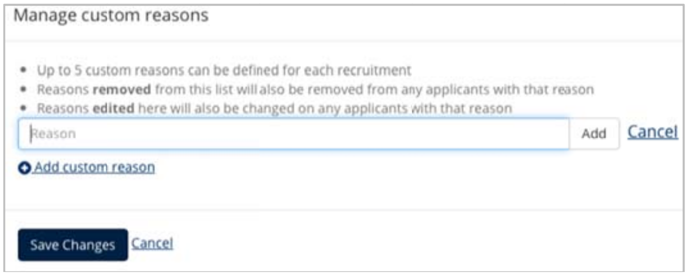
This section displays the system's default disposition reasons that will be used later to assign to applicants. Disposition reasons justify why applicants didn't move forward in the hiring process and will be an important component of the final Search Report. Any approver named in the recruitment can view this information but cannot edit it.




**Customize disposition reasons:** Analyst may customize the lists per recruitment if the default reasons do not meet their needs. After the first applicant applies, only the Recruit administrator may customize the lists.

1. Click the button, **Add custom disposition reasons**.

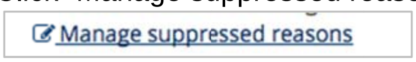

2. The custom reasons dialog box opens. Click "Add custom reason."




3. Type a customized disposition reason and click the "Add" button beside it.
4. Add up to 5 custom reasons.
5. Save Changes.
6. The custom reason appears at the top of the list of disposition reasons.
7. To edit, click "Manage custom reasons."


**Suppress disposition reasons:** Analysts may suppress any of the reasons to trim the list if needed. After the first applicant applies, only the Recruit administrator may suppress reasons.

1. Click "Manage suppressed reasons."




2. Uncheck a reason to suppress.
3. Save Changes.
4. To edit the disposition reasons click "Manage suppressed reasons."

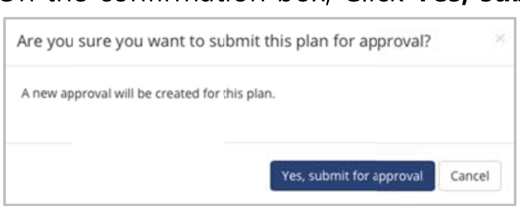
## Search Plan Approvals

After you provide all necessary information based on your search business practices, submit the search plan for approval(s).

### Submit the Plan for Approvals

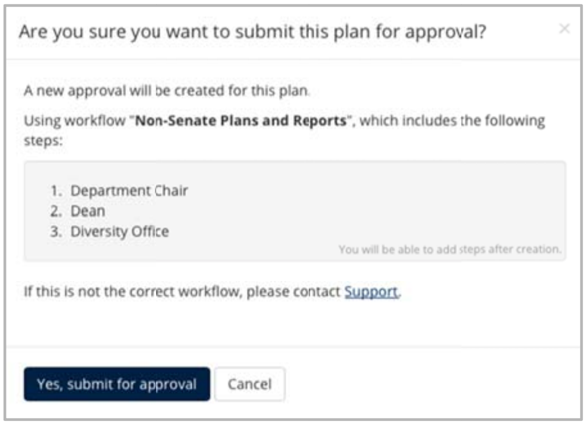
1. Return to the recruitment's **Details** section and click the button, **Submit plan for approval**.


2. On the confirmation box, Click **Yes, submit for approval**.

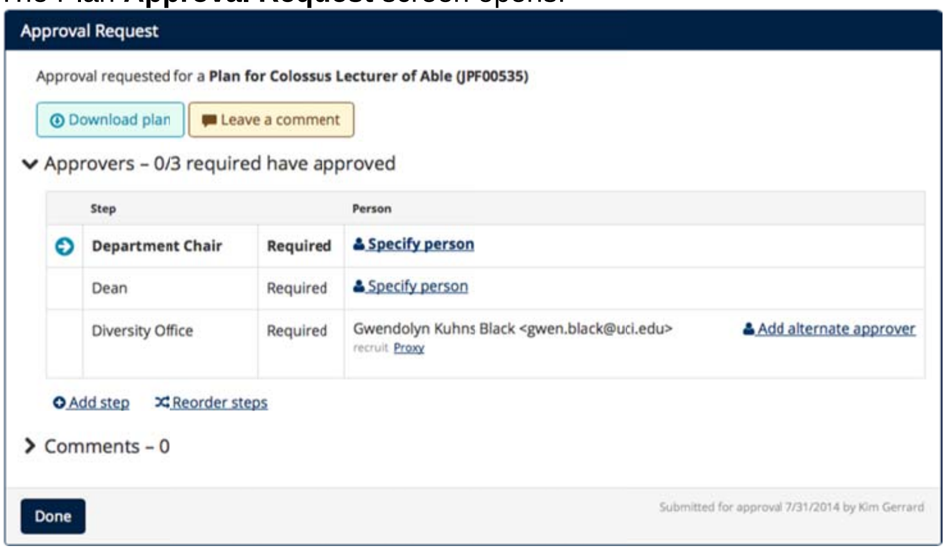



3. The system *may* assign approval workflows containing lists of steps. When this has been done, a chain of approver's roles will be displayed (see next image below.)

4. Click **Yes, submit for approval**. If you think this is not the correct workflow, stop here and report this using the contact link.

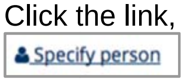



The Plan **Approval Request** screen opens:




**Specify person.** Each step *must* have at least one specified person. In some cases, the system automatically assigns the person. For those steps not assigned:

1. Click the link, “Specify person.”

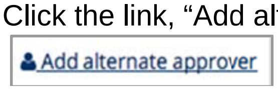
2. Enter the person’s Name or UC San Diego email address into the box.
3. Click **Add**.

**Remove specified person**. (ex: “I typed the wrong user name here; let me fix that.”) To remove a name you have specified:

1. Click the “Remove” link beside the person’s name.
2. ***Note:*** Analysts cannot remove those users that were automatically assigned by the system.

**Assign alternates** (ex: “I know he’s on sabbatical; let me fill in the interim chair.”) If you name an alternate approver, only one person needs to approve. In other words, both “signatures” are not necessary.

1. Click the link, “Add alternate approver.”

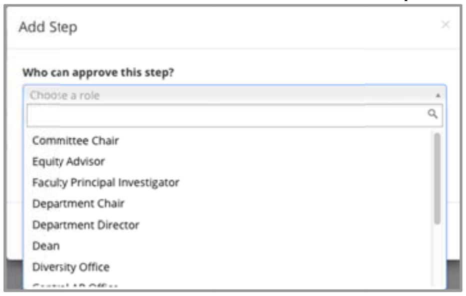
2. Enter the person’s email address or UCInetID into the box.

3. Click **Add**.

**Augment steps with additional steps** (ex: “we also need the Principal Investigator’s vote”).

1. Click the link “Add step.”


2. Choose a role from the list and place into position within the workflow.




3. Once  added, don’t forget to specify a person for the new step!


**Reorder Steps**. (ex: “let’s not bother the Dean until the Principal Investigator says yes”).

1. Click the link, “Reorder steps.”


2. Place your cursor over the icons and drag the step into place.
3. Click “Save changes.”

**Comments**. Communicate with approvers via the comments section.

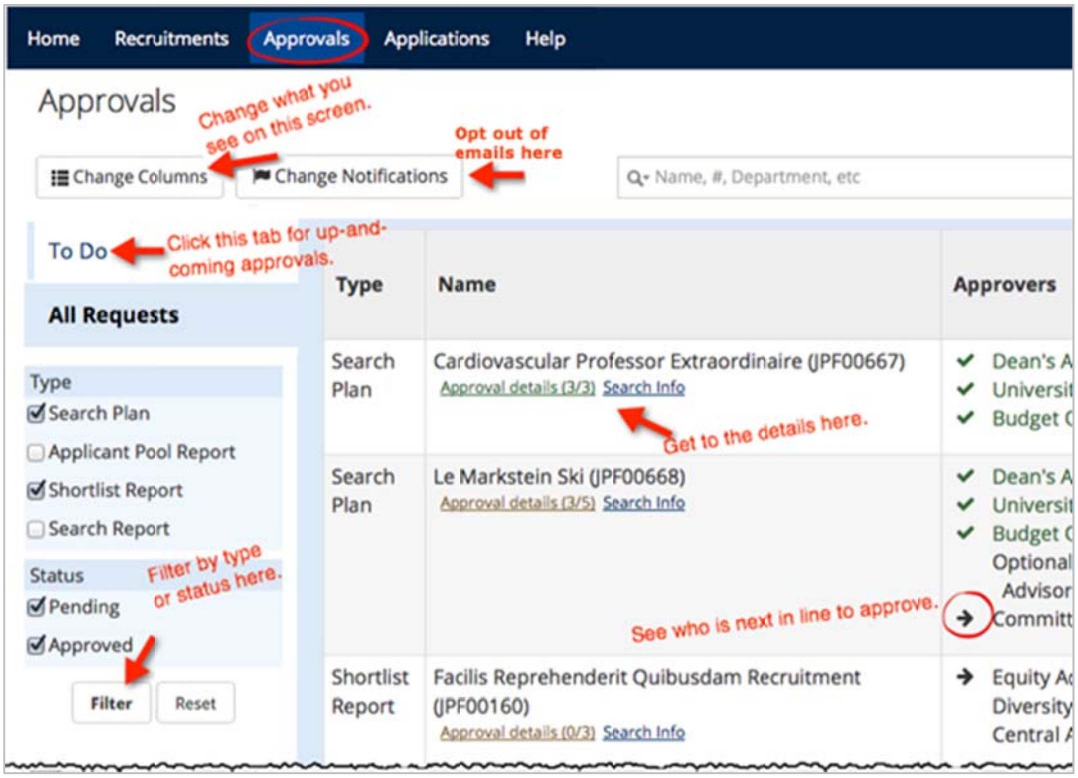
**Download Plan.** Take a look at the PDF of the plan. This is what your approvers will be reviewing.

**Approver Emails.** Automatic email notifications are sent to approvers and cc’d to analysts submitting the plan. The notifications include a direct link to the approval screen where approvers may download the plan, comment, and approve. See Appendix A, “How Approvers Use Recruit” and *Appendix B, “Notifications Sent to Approvers.” Here are other details about how the approval emails work:*

- *Approvers who are next in line in the workflow receive an email. (The arrow points out the step.) A copy is also sent to the analyst who submitted the approval.*
- *If a step is approved before it is the current step, the email is suppressed.*
- *If there are multiple people listed in a step (alternates), all receive the email simultaneously.*
- *The email template for optional approvers have slightly different wording:  “Your approval is **requested”** rather than “**required**.”*
- *When a current step is approved and if the next step is marked as optional, all approvers for the subsequent mandatory step are sent an email.*
- *Recruit doesn't nag! Approvers are never emailed twice for the same request. It remains up to the analyst to monitor approvals in progress and check for comments left by approvers.*

### Monitor Approvals In Progress

Use the top menu **Approvals** link to monitor approvals in progress:

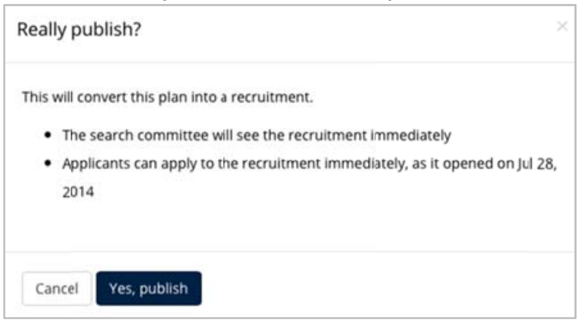



## Publish the Approved Plan

Publishing will control whether the recruitment is in a Draft state, or ready to be shown to applicants. When a recruitment is not published, it will not be shown to applicants under any circumstances. If it is, then the recruitment will be shown to applicants within the specified open/closed dates.

1. Return to the recruitment's Details screen. If the plan has completed its approvals workflow, a **Publish** button appears. Click **Publish**.

2. Confirm that you would like to publish the recruitment.




***Do not forget to publish! Unpublished recruitments mean that the recruitment will languish! Unpublished recruitments make the URL for applicants unreachable, leaving applicants no way to apply through Recruit.***

## Editing the Recruitment

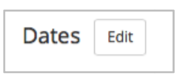
To edit the search Plan fields, return to the sections described earlier in this guide.

Use the inline edit buttons on the Details page to quickly edit any field surrounding the basic recruitment.

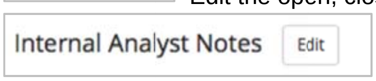

Edit the position name, department, title codes, salary control #, etc.


Customize how various parties can inquire about the recruitment.


Update that public-facing, important field.




Edit the open, close, final dates, add review dates, or change submission date type.




Edit your recruitment notes field.

### Editing Department Names: Cross-listing Recruitments

Sometimes academic positions are shared between units (Departments, Schools, Divisions, etc.) and this is often described in the advertisement. Recruit can "cross-list" recruitments, which will result in:

- The recruitment is displayed beneath the name of the home department and also beneath the cross-listed unit(s) on Recruit's Apply page.
- The applicant's dashboard displays the name of the home department and also the cross-listed unit(s).
- Once a candidate is selected, Recruit's Offer Proposal form displays each unit for the analyst to indicate the allotment of salaried time. This information will be part of the Search Report.

Analysts may cross-list between units for which they have access. For example, School analysts may cross-list between any departments within their school.

1. A lead analyst first creates the recruitment. This recruitment now belongs to a home department.
2. Return to the Details section of the recruitment.

3. Use the inline Edit button beside General Information.

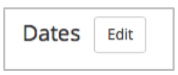

4. Click the link, “Add crosslisted unit.”


5. Place the cursor in field and select from the drop-down list of unit names.
6. Click Save Changes.
7. **Note:** If the list doesn’t show the unit you wish to cross-list, contact a Recruit Administrator at the Academic Personnel Office for assistance.

## Editing Submission Dates: Changing the Recruitment Type

Be sure to review the section Open/Closed/Final Recruitments vs. Pool Recruitments to learn the difference between types of recruitments in regards to their submission dates. *Once applicants have applied to the position, only Recruit Administrators may switch between OCF and IRD.*

1. Click the inline Edit button beside Dates.




2. The Edit Dates modal editor opens. Click the link, "Change recruitment type." You may roll your mouse over the tool tip to learn the difference between the types.


3. You'll be required to enter a Close date when changing from an IRD to an OCF.
4. You'll be required to enter an Initial Review Date when changing from an OCF to an IRD.
5. Once the dates are set, click the button "Change to Open/Close/Final" or vice versa to make the switch.
6. The Details screen will note the new type in the Dates section - either Open Closed Final or Review Dates.
7. The changed submission dates will display correctly to applicants on the Apply page and on application dashboards.
8. You may also use "Change recruitment type" as a toggle. For example, if the IRD dates are amiss, try changing the type to OCF, then back to an IRD and fix the dates accordingly.

**Note:** Changing the recruitment type may have an impact on the applicants. Please consider carefully before making the switch and consider notifying existing applicants using Recruit's bulk email feature.

## Editing an Approved Plan

The flexibility of Recruit allows the analyst to edit any area of the plan, even after approvals — and the PDF will be updated accordingly. But be advised, once a role has approved the plan, there is no re-approving it *for that role*. In other words, if your Dean has approved the plan and then you make a change, Recruit does not provide a way for you to resubmit the plan for approval to the Dean a second time.

## Editing a Published Recruitment

Once published, the final PDF of the approved plan is available for download. This is a snapshot in time; a historical record of what was approved. If you make changes to the recruitment of any kind after it is published, the change will not be reflected in the PDF unless you first Unpublish the recruitment. Your own department's business practices should dictate when it is prudent and necessary to edit information that has already been approved and/or published, just as you would in a paper process.

### To Unpublish a Recruitment

This action pulls the recruitment back to a draft state. Unpublishing does not remove any prior approvals. The "Unpublish" button appears up until the first applicant applies.

1. Return to the Details section of the recruitment.
2. Click the Unpublish button located on the far right side of the screen.

# Part 2: Applicants & Applications

The Search Plan has been approved, published and applicants have begun applying. Analysts locate the applicant pool either on the **Recruitments** page or the **Applications** page.


**Reaching the Applicant List from the Recruitments page** (Analysts only). Analysts can reach the applicant list directly from their recruitments page via the link beneath the name of the recruitment. The number in parenthesis is the total number of people who have *applied*.


Locating the applicants from the main Recruitments page.

**Reaching the Applicant List from the Applications page** (Reviewers). Committee reviewers will use their top applications menu link to see all recruitments in their purview. The number in parenthesis is the total number of people who have *completed* their application.


Locating the applicants from the Applications page.

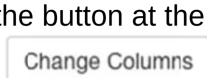
## Tools to Use with the Applicant Lists

**Column Sorting.** Click directly on most column headers to sort the applicant list.

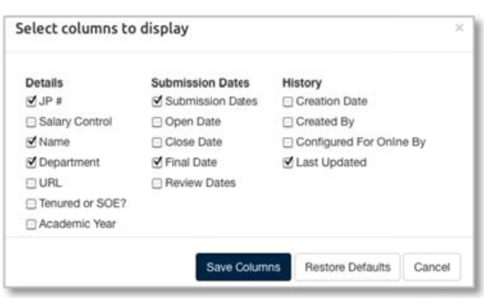
**Search Box**. Zero in on the applicant you are looking for by typing in a search word and pressing return.

**Change Columns**. Add or reduce the information about the applicants.

- Click the button at the top of the list of names, "Change Columns".




- Check information you want to display on your screen
- Click the button, **Save Columns:**



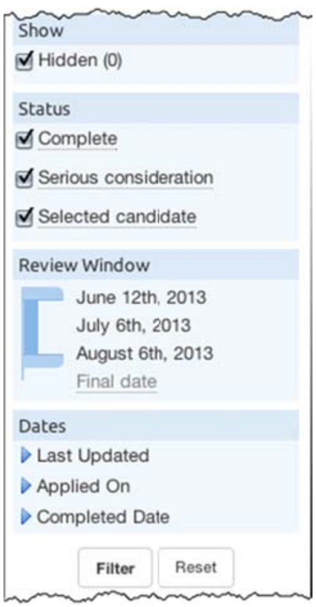

**Download Applicant Data:** This is a useful tool used to create lists of applicant names, addresses, and other column criteria to take to a meeting or use for mail merges.

Recruit will build a comma-delimited file consisting of the applicant/applications list and the data fields that have been pre-selected from the column options.

- Click the button, **Download This Data** for all column data displayed.
- Or for a simpler list, click **Download Names & Addresses.**
- Depending on the web browser —
  - the file will download to the usual download area on the user's computer OR
  - the file will open automatically in Excel OR
  - the browser will present a message asking the user to either OPEN or SAVE it.

**The Filter Panel:** Use the advanced filter panel to fine-tune your list of applicants.

1. Use "Reset" when you want to restore the applicant list to the default state.
2. If you click away from this screen, your filters will persist.
3. Committee reviewers do not have the **Show Hidden** filter.




Filtering the list of applicants.

**Show:** Set a filter to show applications that have been hidden from the committee.
- Check the box and click the Filter button at the bottom of the panel.

**Status:** This filter allows you to pick and choose which applicants to display based on the applicants' various statuses.
- Make your selection
- Click the Filter button at the bottom of the panel.

**Review Window Slider Mechanism (available only for IRD recruitments):** Adjust the sliders if you want to see only those applicants who applied by a certain review date. If you want to see everyone, move the two thumbs as far apart as you can – as illustrated here. Think of it like opening the window to see the widest possible view. Remember, Committee Reviewers see only completed applicants.

**Dates:**
- Choose: Last Updated, Applied On, or Completed Date.
- Choose a date range: On or before, On or after, On, or Between.
- Choose a date.
- Click the Filter button at the bottom of the panel.
- Adjust the columns to see the results of the date filters.

***NOTE:*** The following actions will trigger the time/date stamp change in the "Last Updated column":
1. Any change made to the documents provided.
2. Any change made to the references (removal, contact info changed, etc).
3. When a reference letter has been uploaded into the system.
4. Any change made to an applicant's personal information.
5. If you manually complete the applicant (and if you revert back again).

**Mark as Read:** This is a way to quickly put a checkmark next to applicants that have been reviewed. The feature is available to all users with applicant viewing rights but the checkmarks are private and not viewable by one another.
1. Locate the applicant or applicants in the list and put a check in the empty box beside the name(s).
2. Then click the "Read" button in the row at the top of the list of names.


3. A green indicator will appear in the applicant’s row.

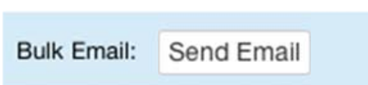
**Application modified since marked as read:** If an application was updated since you marked it as read, an alert icon will cue you.

- Locate the applicant in the list.
- If modified since you marked it as read, an alert icon will appear:

**Hide / Unhide an applicant:** Occasionally an applicant will contact Recruit or the department requesting we remove their application. While it is not possible to permanently remove an applicant’s application, analysts can hide it from the committee reviewers. Chairs and editors also have this tool.

1. Locate the applicant in the list and put a check in the empty box beside the name.
2. Then click the "Hide" button in the row at the top of the list of names.
3. Committee reviewers will no longer see this applicant.

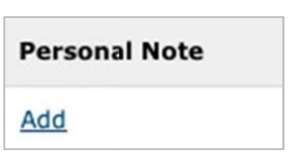

**Send bulk email:**
1. First, put a check in the empty box beside the name(s) of applicants you wish to email.
2. Then click the “Send Email” button in the row at the top of the list of names.




3. A template will open where you will be able to compose one message to send to a group of people.
4. You may insert optional variables into the subject line and message body: ApplicantFirstLastName, UserName, CompletionDate, RecruitmentName, ApplicantAddress, RecruitmentAddress, ContactAddress.

**Add Personal Note:** This is a way to jot yourself a note about an applicant. The feature is available to all users with applicant viewing rights but notes are private and not viewable by one another.

1. Click the link, "Add" in the Personal Note column beside the applicant's name.



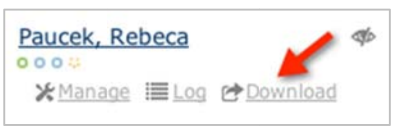
2. Notes may have up to 255 characters.
3. Click "Save".
4. To *read* the entire note, roll over it with the mouse.
5. To *edit* the note, roll over it with the mouse and click.
6. Click "Remove" to delete the note.

**Manage the applicant/application:** Only analysts, chairs, and editors have the manage link below the name of each applicant. Managing applicants/applications is covered in another part of this manual.


**Check the Applicant's Log:** Check the time-stamps of all the actions that have taken place on/within an applicant's application.

•Click the "Log" link below an applicant's name.
•Read the log and close it when you are finished.


**Download the applicant's documents:** Obtain a PDF bundle of all an applicant's documents with one click. Click the "Download" link found beneath their name.




**Progress dots:** Roll over the color-coded dots beneath an applicant's name for a list of what requirements are in and what is still missing.


**A Cue to Know When an Applicant is not visible to the Reviewers:** Roll over this icon to quickly determine why that applicant is not being shown to the search committee.


## Manually Add an Applicant

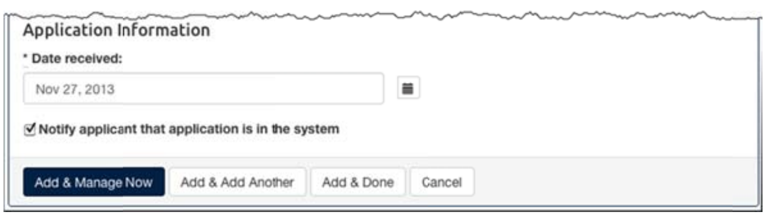
Occasionally Analysts may need to create an application on behalf of someone. For example, this may be useful for high-level searches, such as those for Deans.

1. Locate the recruitment's list of applicants.
2. Click the button, **Add applicant** located on the horizontal bar at the top of the list.


3. Fill in the form: Applicant's contact information, degree information, current employment, etc:


4. **Optional:** At the bottom of the form, check the box to send a notification to the applicant that an application has been established on their behalf. *See Appendix B, "Application is in the system."*

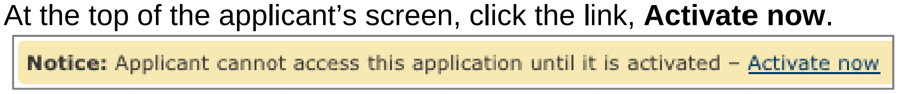

5. Finally, click the button, **Add & Manage Now**.




Bottom section of the Add Applicant form.

**Granting Access to the Applicant.** This important action sends another email to the applicant that grants the applicant access with login and Diversity Survey instructions. *See Appendix B, "Access your application."*

1. At the top of the applicant's screen, click the link, **Activate now**.




2. Look over the applicant's information and click the button, **Activate applicant access**.


Notifying the applicant that an application has been submitted in their behalf sends the login information and Survey instructions.

3. Before the email is sent, verify the email address for the applicant is correct.


## Basic Qualifications

Because of the proliferation of online applications that exist throughout the nation, the U.S. Department of Labor/ Office of Federal Contractor Compliance Programs considers only those individuals who meet the advertised basic qualifications as “applicants.” You will need to mark your applicants in order to produce an accurate Diversity Report that meets the requirements of the OFCCP.

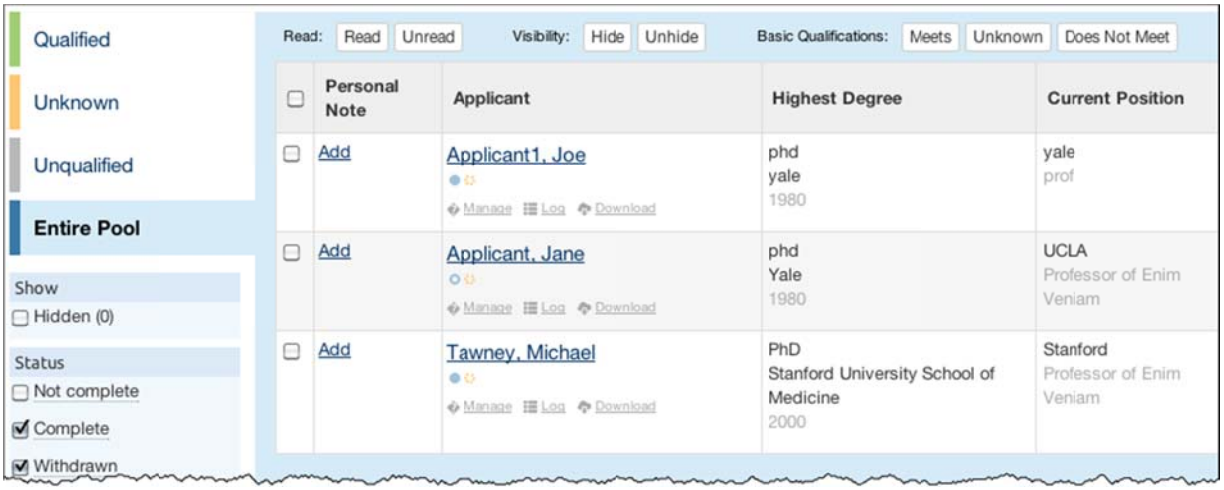
***IMPORTANT! Always use objective, non-comparative, relevant, and verifiable criteria. Contact UC San Diego’s Office of Academic Diversity and Equal Opportunity for any help deciding which applicants meet or do not meet basic qualifications at adeo@ucsd.edu.***

**Entire Pool view:** The entire pool tab, color-coded blue, lists all applicants. (Committee reviewers will see only completed applicants).

You may mark applicants from the Entire Pool view. Say, for example a PhD is a basic qualification. Look in the Highest Degree column, then…

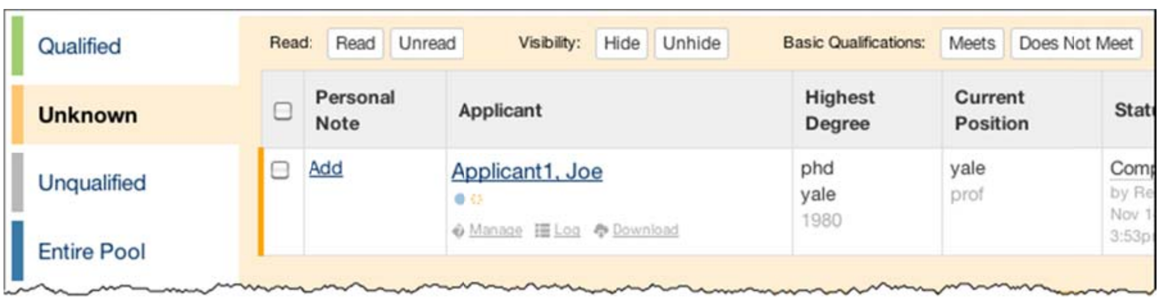
1. Find a completed applicant (only completed applicants’ qualifications can be judged).
2. Put a check in the empty box in the applicant's row.
3. You may select multiple names and click the master checkbox at the top of the row.
4. Click **Meets**, **Unknown** or **Does Not Meet** to move the applicant to the appropriate category.

The *Entire Pool* view respects any filters the user has set. If you see unexpected results, then take a look at your filters and clear them if necessary. At the bottom of the list, you'll be reminded about any filters you may have set and you can clear them with the button, **Remove all Filters**.



All applicants will be found on the Blue tab.

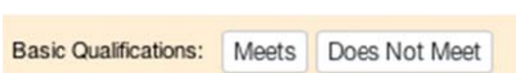
**Unknown applicants view:** As soon an applicant applies, Recruit places them in the **Unknown** category, color-coded **Orange.** The *Unknown* view respects any filters the user has set. If you see unexpected results, then take a look at your filters and clear them if necessary. At the bottom of the list, you'll be reminded about any filters you may have set and you can clear them with the button, **Remove all Filters**.



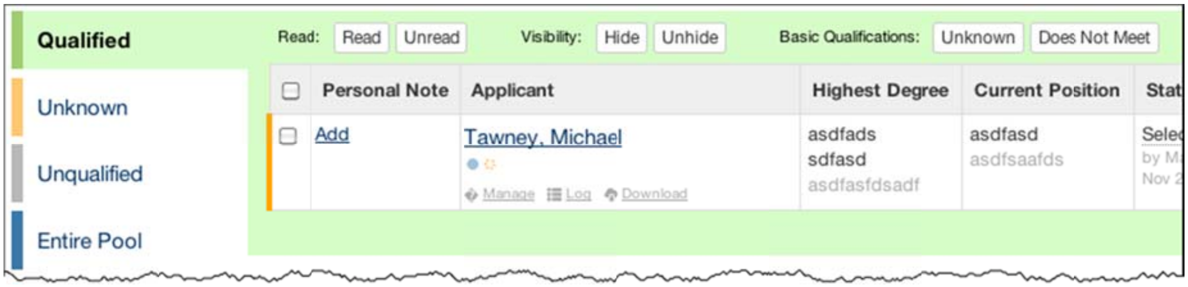
Applicants who have not yet been marked appear on the Orange tab.

**To mark applicants as Qualified or Unqualified from the Unknown view:**

1. Find a completed applicant (only completed applicants' qualifications can be judged).
2. Put a check in the empty box in the applicant's row.
3. You may select multiple names and click the master checkbox at the top of the row.
4. Click the button at the top of the list of names **Meets** or **Does Not Meet** to move the applicant to the appropriate category.




**Qualified applicants view:** Applicants found in the Qualified/**Green** category are those who have been marked as meeting the basic qualifications. These applicants' diversity data will be used in the diversity analysis reports produced later.



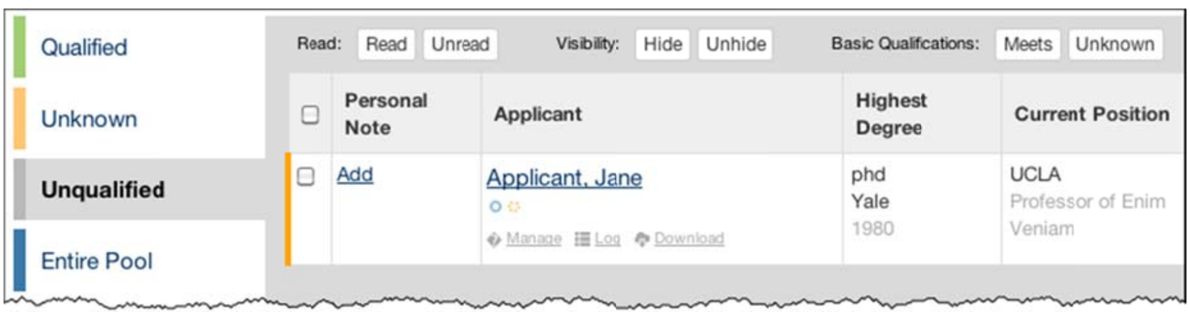

Applicants marked “Meets” appear on the Green tab.

**To move an applicant back to Unknown or to mark them as Unqualified:**

1. Put a check in the empty box in the applicant's row.
2. Click "Unknown" or "Does Not Meet."


**Note:** You can revert a *Qualified* applicant back to *Unknown* if you discover required documents have been deleted from the application. If the required document is re-uploaded, the applicant will automatically move back to “Qualified.”

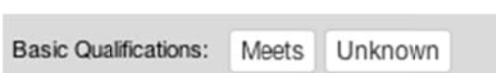
**Unqualified applicants view:** The Unqualified/**Grey** category contains applicants who have been marked as "Does not meet basic qualifications.”




Applicants marked “Does Not Meet” appear on the grey tab.

**To move an applicant back to Unknown or to mark them as Qualified:**

1. Put a check in the empty box in the applicant's row.
2. Click **Meets** or **Unknown**.




***What does the search committee see?*** *Reviewers will have the same color-coded categories. They will see all applicants who are completed and categorized accordingly. However, reviewers will* ***not*** *have the ability to mark the applicants as Meets/Does Not Meet or move them to a different category.*

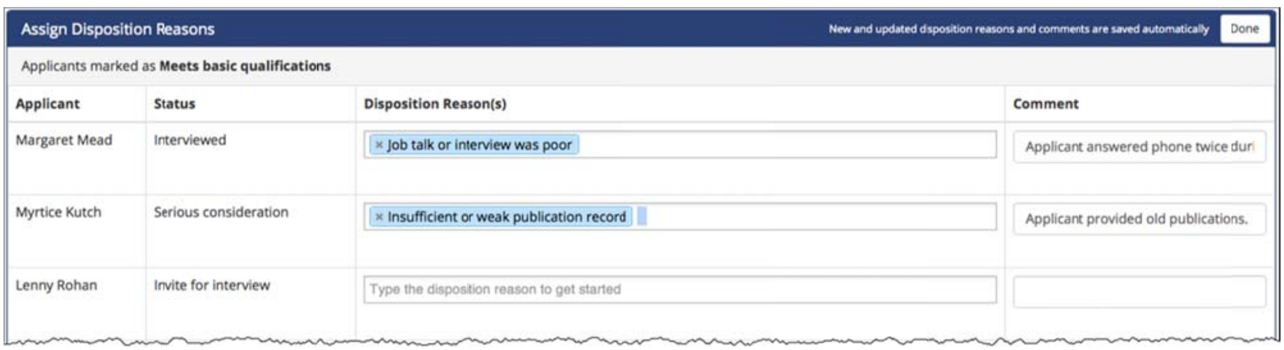
## Disposition Reasons

Assign reasons why applicants did not move forward in the hiring process. Disposition reasons are an important component of the final Search Report.

### Assign disposition reasons to qualified applicants

1. Go to the “Qualified” tab and click the button at the top of the list, “Disposition Reasons: Assign Reasons.”


2. For each applicant, place your cursor in the box and choose from the drop-down menu of reasons.
3. Optionally add one comment per applicant.




### Assign reasons to unqualified applicants

1. Go to the “Unqualified” tab and click the button at the top of the list, “Disposition Reasons: Assign Reasons.”


2. Place your cursor in the box for each applicant and choose from the drop-down menu of reasons.
3. Optionally add one comment per applicant.

## Statuses and Shortlisting

### Updating Applicants’ Statuses

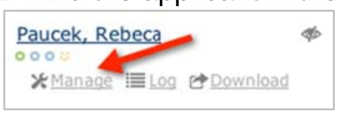
Keeping an applicant's status up to date will make sure that the search committee is always aware of the current status and it also satisfies annual reporting requirements by the Office of the President.

Definitions of statuses are clearly defined by rolling over the applicant’s status in the status column:


**Which status is considered "shortlisted?"** Shortlist consists of all statuses beyond Serious consideration. Those include: Recommend for interview, Interviewed, Proposed candidate, Offered, Accepted offer, Declined offer, Hired, Withdrawn, and Campus declined.

***** Serious consideration is NOT a shortlist status.

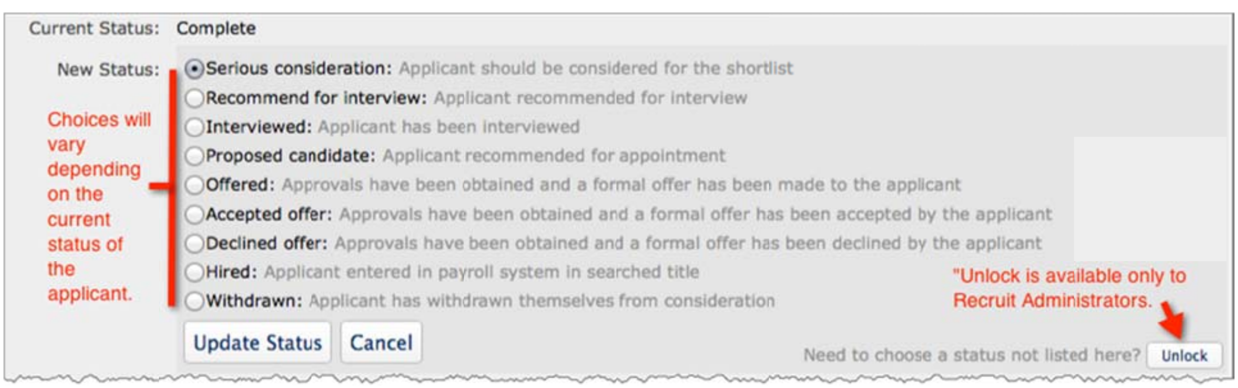
1. Find the applicant in the list and click the "Manage" link:



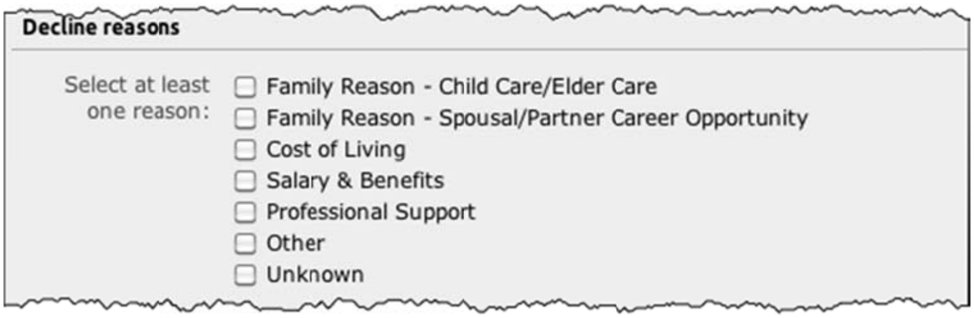

2. Click the **Update status** button at the top of the application:


3. Recruit suggests the next logical status:


4. Or click "Choose another status…" and select a status from the defined list. **Note:** You may only select statuses in a forward-moving progression. If a mistake has been made and you are unable to roll back, contact a Recruit Administrator at the Academic Personnel Office to unlock the statuses.




If a status is changed from **Selected candidate** to **Withdrawn**, choose a reason from the list provided. The same choice list appears when updating the status to **Declined**.

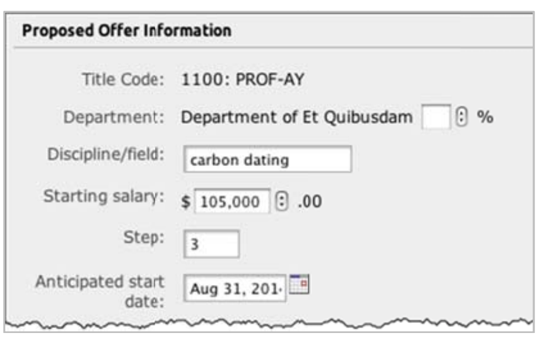



Select a reason why the selected candidate withdrew.

## Offer Proposals

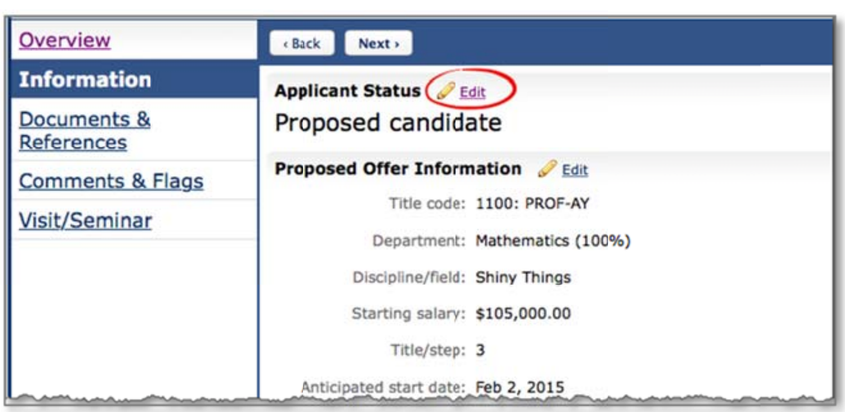
When updating to **Proposed Candidate** and beyond**,** click **Enter proposed offer information**.


Fill in the form and Save Changes. When multiple title codes have been assigned to the recruitment, you will be able to select the title code to associate with the applicant. If the recruitment was cross-listed between departments, you will be able to select the main department to associate with the applicant.





The offer information is editable from the applicant's information section:



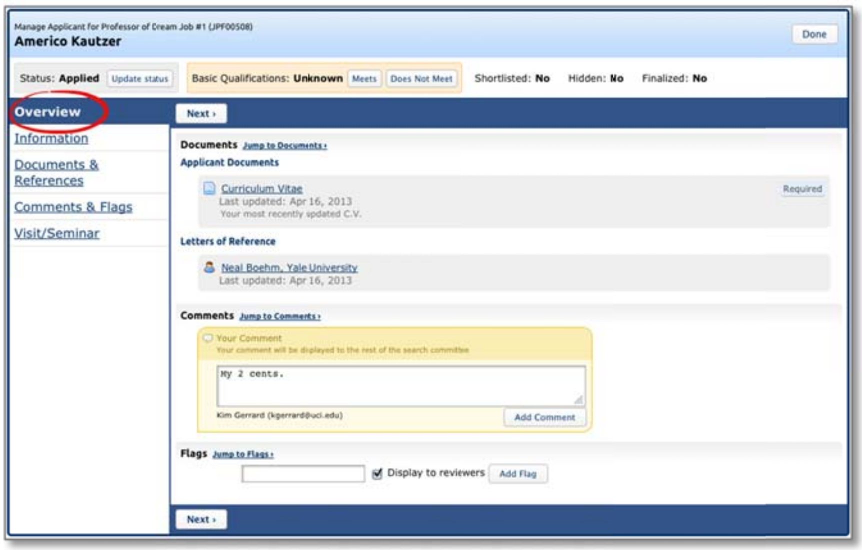
# Manage the Applications

Analysts, chairs, and editors all have the ability to manage the applications although the analyst and editor generally do the tasks that are involved.

Click the **Manage** link below the name of each applicant:


## Overview

Click “Manage” beneath an applicant’s name and the application’s Overview screen opens:




Manage applicant: The overview of an applicant’s file.

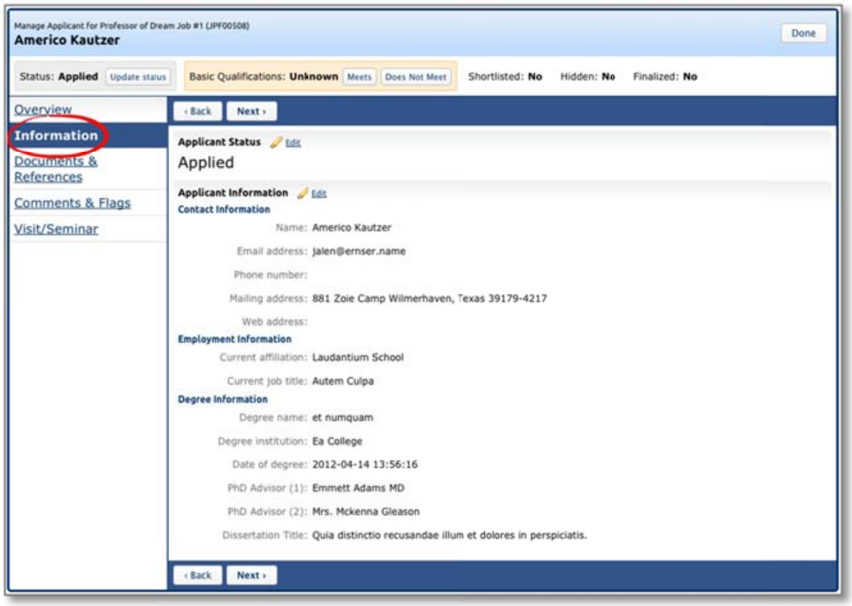
**The Overview section includes:**

**Applicant Documents.** Click the hyperlinked filename to download them to your computer.
**Letters of Reference.** Click the hyperlinked name of the reference to download their letter.
**Comments.** View, post, or update a comment to share with your search committee peers.
**Flags.** View, add, or update one or multiple flags and decide whether to display it to reviewers.

## Information

View or update the applicant’s address, email, username, personal web site, employment, and degree information.

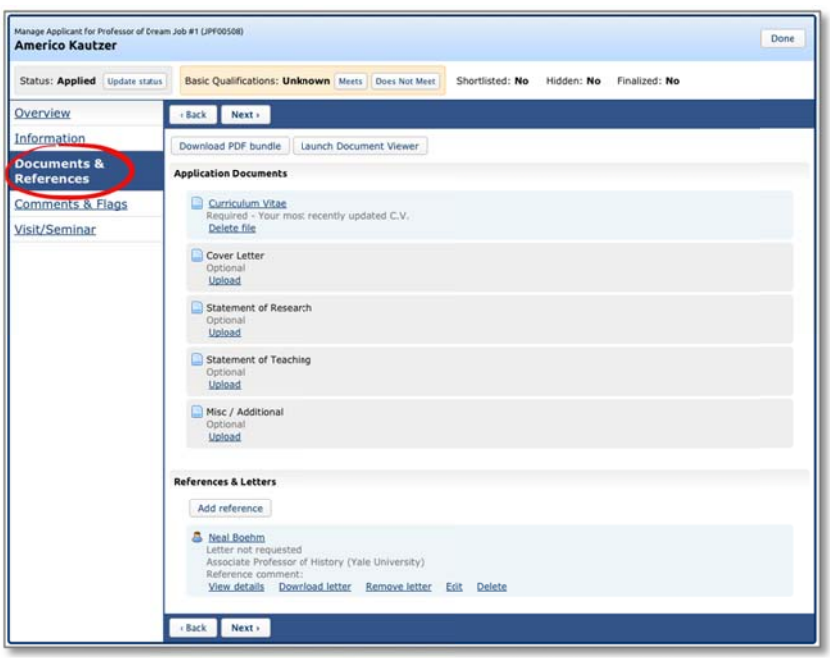
**The Overview section also includes:**
**Applicant Status.** Another way to edit the status or return to the offer proposal.




Manage applicant: The information screen.

## Documents & References

**Manage the Applicant's Documents.** Fully manage the applicant's required documents; **View**, **Upload** or **Delete** them if necessary. Documents may be uploaded as PDF files. Other valid file types include: zip, jpg, rar, tif, mov, bmp, 3gp, png, wmv, m4v, mp3, mp4, psd, swf, tiff.




Manage applicant: Full control over documents and references.

**Upload.** Click the "Upload" link and navigate to the electronic file on your system. Or else, check the box "Document received outside of the UC Recruit application." This will create a placeholder document with a notation that the actual physical document is housed outside of Recruit. A description field is provided to cue the committee that the material exists and where to physically locate it.  This action will be logged and time-stamped.

**Delete.** Click the "Delete" link to permanently remove an applicant's document from their application. This action will be logged and time-stamped.

## Manage the References & Letters

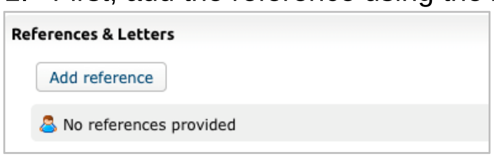
Recall when your recruitment was configured, references requirements were set to one of the following:

- **None** (the applicant is not required to provide references)
- **Only contact information** (the applicant is required to provide their reference's names, etc)
- **Letters of recommendation** (the applicant is required to provide references AND notify their references that a letter of recommendation is requested)

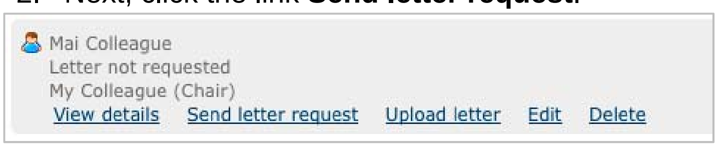
Department analysts, chairs, and editors have complete manage rights regarding references and the letters of recommendation per applicant. You may Add, Edit, or Delete a reference. You may **Upload** letters that arrive outside the system. You may Send a letter request to references if the requirements are "Contact Information Only" or "None". *See Appendix B: Notifications Sent to References (department-initiated).*

**Send a letter request** to references in cases #1 and #2 outlined above.

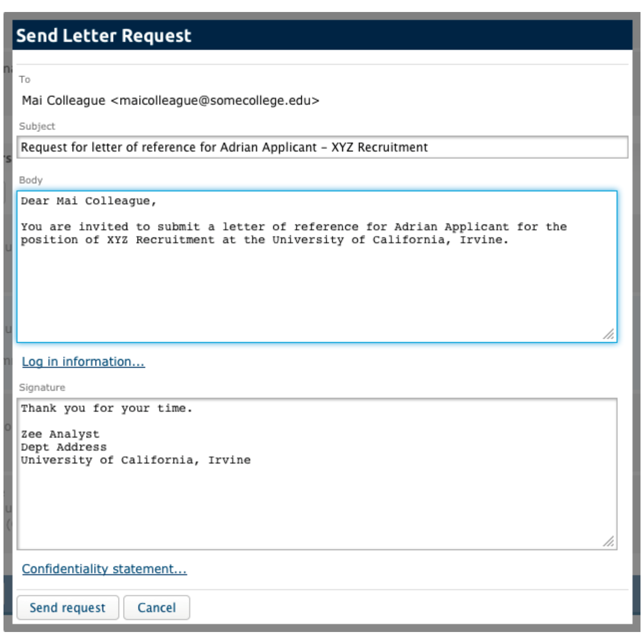
1. First, add the reference using the **Add reference** button.



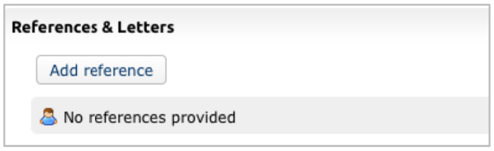

2. Next, click the link **Send letter request**.



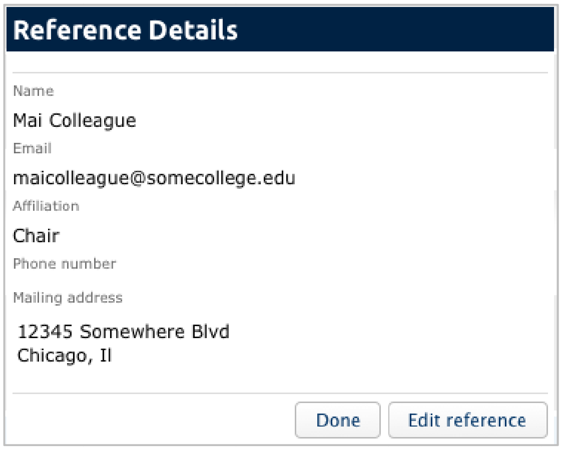

3. The following email template opens. All fields are editable except the Confidentiality Statement (The University of California confidentiality policy).



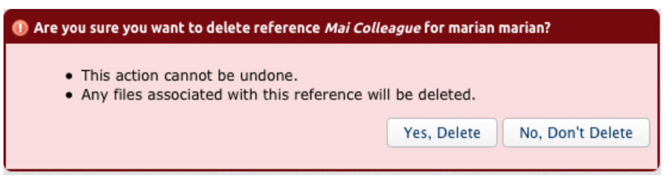
**Add a reference** for an applicant using the **Add reference** button. This button appears in all 3 cases outlined above.



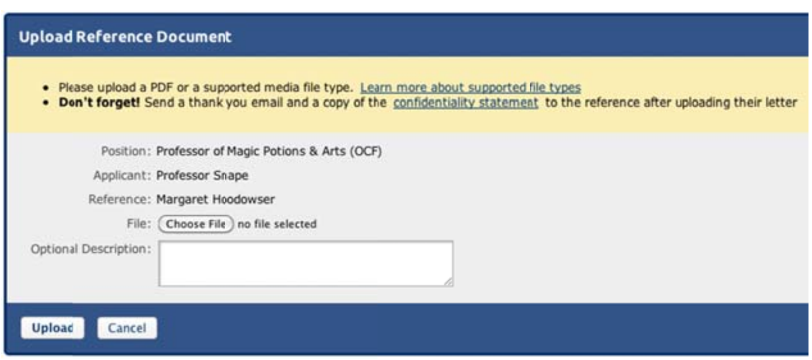

**View the details** of any reference and edit this information. This capability is possible in all 3 cases outlined above.




**Delete a reference or a letter** in any of the 3 cases outlined above. A confirmation/warning appears:




**Upload a letter** into the applicant's file if the letter arrives outside of Recruit (via U.S. Post or via email) in any of the 3 cases outlined above. Please remember to thank the letter-writer and send a copy of the confidentiality statement, which you will find via a link on the upload screen.




## Manage the Applicant's Comments & Flags

Manage applicant: Comments, and Flags

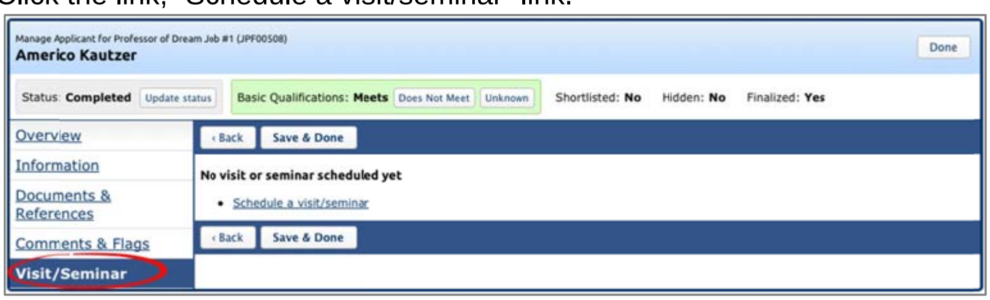
**Flags.** To flag an applicant, type a descriptor. Remember to click the button, **Add Flag**. Analysts, Committee Chairs, and Editors can view this information. Use the checkbox if you wish to hide the flag from reviewers.

**Comments.** Comments should be written as considerately as words spoken in face-to-face meetings. Analysts, Committee Chairs, Editors, and Committee Reviewers may always view one another's comments. Click **Add Comment**.

### Schedule a Visit or Seminar.

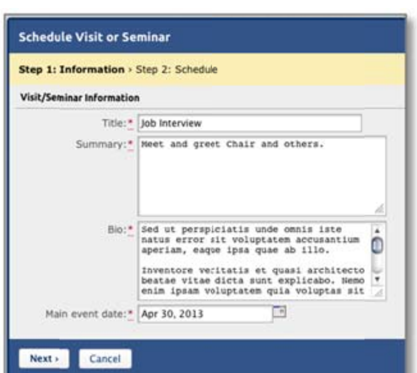
Schedule or edit applicant visits for viewing by the search committee. Add abstracts and biographies into the summaries. Optionally schedule additional events associated with the visit.

1. Click the link, "Schedule a visit/seminar" link.

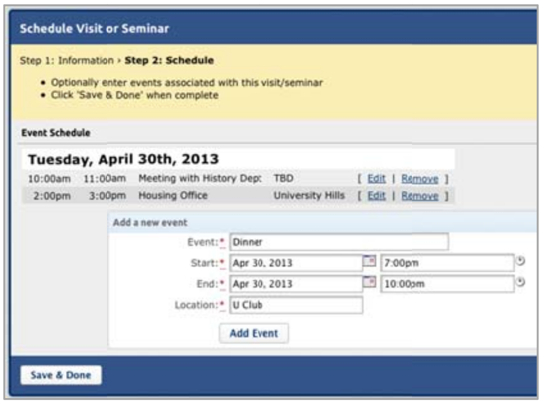


Manage applicant: Optionally schedule the candidate's visit/seminar in Recruit.

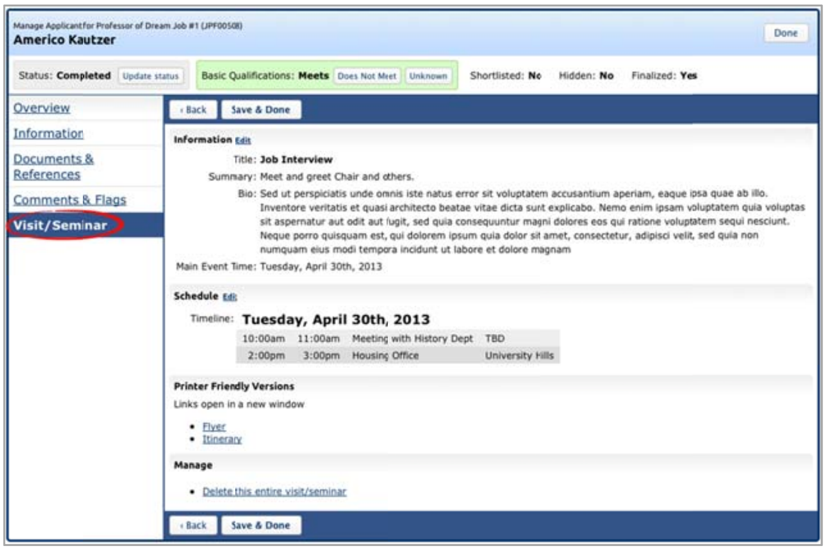
2. In the form that follows, add a title, summary, bio of the applicant, and the main event date and click **Next**.




3. Schedule any associated events that may occur during the visit/seminar and click **Save & Done**.




4. After saving, you are returned to the main Visit/Seminar screen. This is where you find links to a flyer and a formatted itinerary that you may print and distribute.



The completed visit/seminar information.

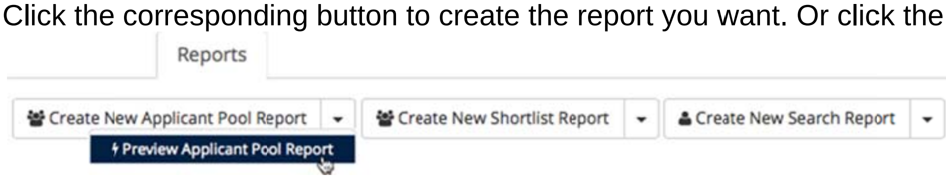
# Part 3: Reporting

## Applicant Pool and Shortlist Reports

Analysts may generate two types of diversity analysis reports and solicit approvals by key people whom they will identify through a roles list. Analysts, equity advisors, and diversity analysts may create the reports at any time or multiple times, even after the recruitment is closed.

1. Find the **Reports** link on the main Recruitment screen, the applicant's screen, or on any of the Search Info screens.


2. Click the corresponding button to create the report you want. Or click the down arrow to preview.



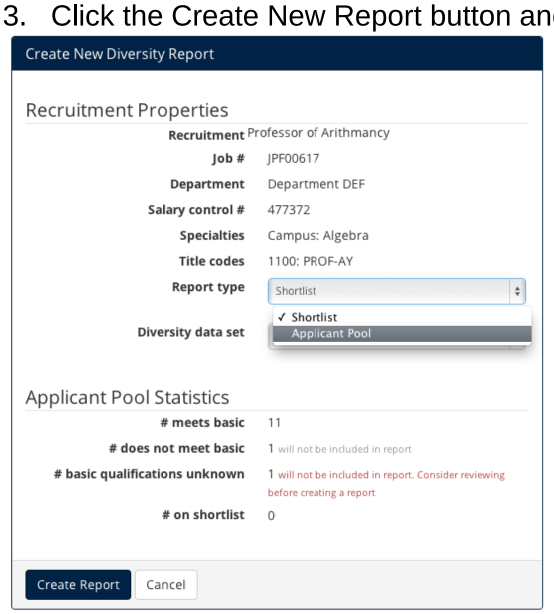

### The Applicant Pool Report

The Applicant Pool report may be thought of as an interim report. It shows aggregated results from the diversity data collected from applicants who completed their applications, took the survey, and have been marked as "Meets Basic Qualifications." Their responses are compared against national averages. This report is intended to be reviewed and approved before anyone is put on the shortlist.

### The Shortlist Report

The Shortlist diversity report shows the same results that are in the Applicant Pool Report ***plus the aggregated diversity data for the short listed applicants.*** Any approver will have access to this confidential information on this report.

3. Click the Create New Report button and a summary appears:



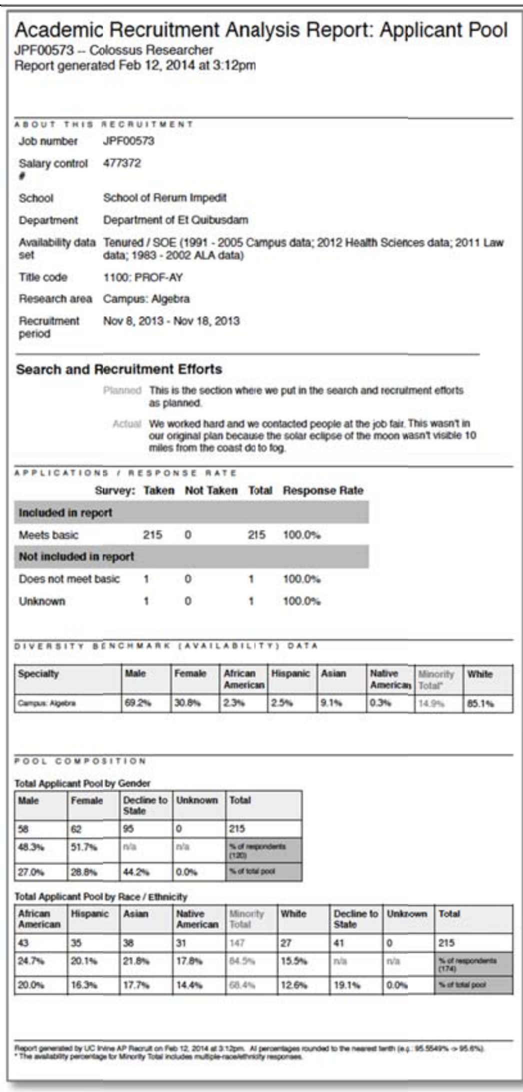

**Report Type**. Drop down menu shows either Applicant Pool or Shortlist.

**Applicant Pool Statistics.** This region displays the number of *completed* applicants who have been marked as "Meets Basic Qualifications" and have submitted their survey on diversity. These survey-takers will be the only applicants in aggregated results, making this report in compliance with the US Department of Labor. If the count is zero, you must go back and mark the applicants who meet the basic qualifications. The count for shortlisted applicants is shown in this region too.

***Note:*** For Basic recruitments (those that have not been configured for online application management), a field is provided for the Analyst to type in the number of applications received outside of Recruit:

4. Back on the **Reports** page, Applicant Pool, Shortlist, and Search Report tabs separate the various reports.

   - Color-coded boxes at the top indicate the status of the particular report's approvals.
   - The "Date Generated" column keeps a running tally of all reports created throughout the search.
   - The "Download" link opens a PDF of the report. The samples below show the two types of diversity reports: Applicant Pool report (left) and the Shortlist report (right).



Academic Recruitment Analysis Report: Applicant Pool
JPF00573 -- Colossus Researcher
Report generated Feb 12, 2014 at 3:12pm

ABOUT THIS RECRUITMENT

| | |
|---|---|
| Job number | JPF00573 |
| Salary control # | 477372 |
| School | School of Rerum Impedit |
| Department | Department of Et Quibusdam |
| Availability data set | Tenured / SOE (1991 - 2005 Campus data; 2012 Health Sciences data; 2011 Law data; 1983 - 2002 ALA data) |
| Title code | 1100: PROF-AY |
| Research area | Campus: Algebra |
| Recruitment period | Nov 8, 2013 - Nov 18, 2013 |

Search and Recruitment Efforts

Planned: This is the section where we put in the search and recruitment efforts as planned.

Actual: We worked hard and we contacted people at the job fair. This wasn't in our original plan because the solar eclipse of the moon wasn't visible 10 miles from the coast do to fog.

APPLICATIONS / RESPONSE RATE

| Survey: | Taken | Not Taken | Total | Response Rate |
|---|---|---|---|---|
| **Included in report** | | | | |
| Meets basic | 215 | 0 | 215 | 100.0% |
| **Not included in report** | | | | |
| Does not meet basic | 1 | 0 | 1 | 100.0% |
| Unknown | 1 | 0 | 1 | 100.0% |

DIVERSITY BENCHMARK (AVAILABILITY) DATA

| Specialty | Male | Female | African American | Hispanic | Asian | Native American | Minority Total* | White |
|---|---|---|---|---|---|---|---|---|
| Campus: Algebra | 69.2% | 30.8% | 2.3% | 2.5% | 9.1% | 0.3% | 14.9% | 85.1% |

POOL COMPOSITION

Total Applicant Pool by Gender

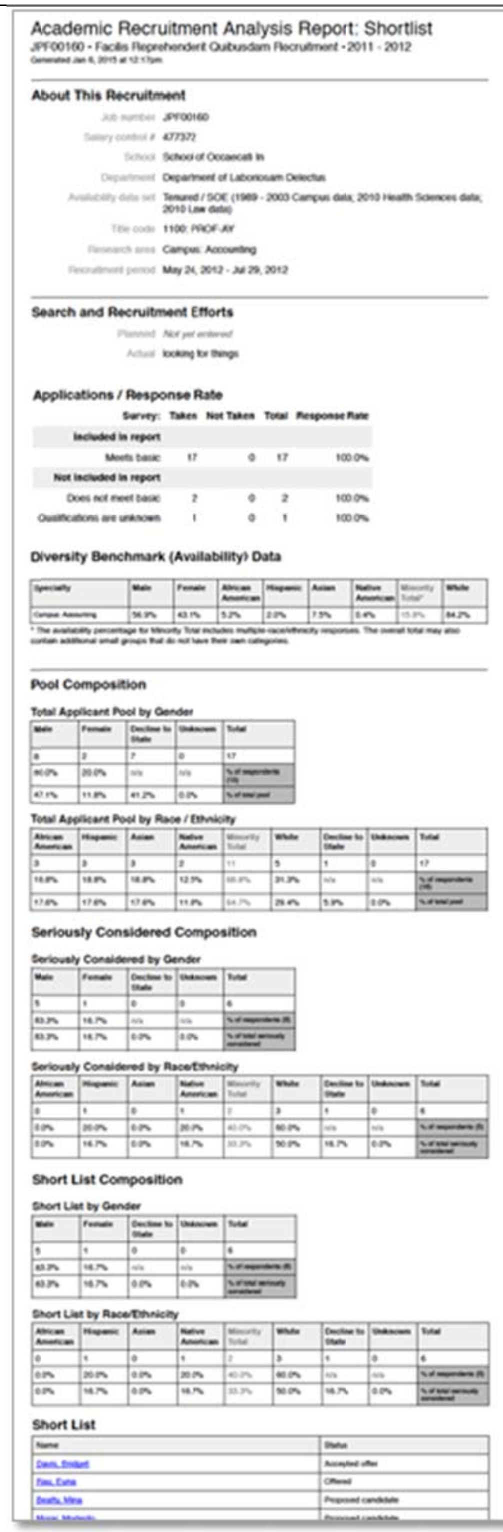
| Male | Female | Decline to State | Unknown | Total |
|---|---|---|---|---|
| 58 | 62 | 95 | 0 | 215 |
| 48.3% | 51.7% | n/a | n/a | % of respondents (120) |
| 27.0% | 28.8% | 44.2% | 0.0% | % of total pool |

Total Applicant Pool by Race / Ethnicity

| African American | Hispanic | Asian | Native American | Minority Total | White | Decline to State | Unknown | Total |
|---|---|---|---|---|---|---|---|---|
| 43 | 35 | 38 | 31 | 147 | 27 | 41 | 0 | 215 |
| 24.7% | 20.1% | 21.8% | 17.8% | 84.5% | 15.5% | n/a | n/a | % of respondents (174) |
| 20.0% | 16.3% | 17.7% | 14.4% | 68.4% | 12.6% | 19.1% | 0.0% | % of total pool |

Report generated by UC Irvine AP Recruit on Feb 12, 2014 at 3:12pm. All percentages rounded to the nearest tenth (e.g.: 95.5549% -> 95.6%).
* The availability percentage for Minority Total includes multiple-race/ethnicity responses.

**Note:** The minority total column in the Diversity Benchmark section includes applicants who reported multiple race/ethnicity. That is a separate category in the data derived from The National Opinion Research Center (NORC). Those who selected multiple race/ethnicity are not included in the other individual race/ethnicity groups (not in AfAm, Hisp, Asian, NaAm), so the only place they are counted is in the minority total. Therefore: Minority=AfAm+Hisp+NaAm+Mult.



Academic Recruitment Analysis Report: Shortlist
JPF00160 - Facilis Reprehenderit Quibusdam Recruitment - 2011 - 2012

About This Recruitment

| | |
|---|---|
| Job number | JPF00160 |
| Salary control # | 477372 |
| School | School of Occaecati In |
| Department | Department of Laboriosam Delectus |
| Availability data set | Tenured / SOE (1989 - 2003 Campus data; 2010 Health Sciences data; 2010 Law data) |
| Title code | 1100: PROF-AY |
| Research area | Campus: Accounting |
| Recruitment period | May 24, 2012 - Jul 29, 2012 |

Search and Recruitment Efforts

Planned: Not yet entered

Actual: looking for things

Applications / Response Rate

| Survey: | Taken | Not Taken | Total | Response Rate |
|---|---|---|---|---|
| **Included in report** | | | | |
| Meets basic | 17 | 0 | 17 | 100.0% |
| **Not included in report** | | | | |
| Does not meet basic | 2 | 0 | 2 | 100.0% |
| Qualifications are unknown | 1 | 0 | 1 | 100.0% |

Diversity Benchmark (Availability) Data

| Specialty | Male | Female | African American | Hispanic | Asian | Native American | Minority Total* | White |
|---|---|---|---|---|---|---|---|---|
| Campus: Accounting | 56.9% | 43.1% | 5.2% | 2.0% | 7.5% | 0.4% | [illegible] | 84.2% |

* The availability percentage for Minority Total includes multiple-race/ethnicity responses. The overall total may also contain additional small groups that do not have their own categories.

Pool Composition

Total Applicant Pool by Gender

| Male | Female | Decline to State | Unknown | Total |
|---|---|---|---|---|
| 8 | 2 | 7 | 0 | 17 |
| 80.0% | 20.0% | n/a | n/a | % of respondents (10) |
| 47.1% | 11.8% | 41.2% | 0.0% | % of total pool |

Total Applicant Pool by Race / Ethnicity

| African American | Hispanic | Asian | Native American | Minority Total | White | Decline to State | Unknown | Total |
|---|---|---|---|---|---|---|---|---|
| 3 | 3 | 3 | 2 | 11 | 5 | 1 | 0 | 17 |
| 18.8% | 18.8% | 18.8% | 12.5% | [illegible] | 31.3% | n/a | n/a | % of respondents (16) |
| 17.6% | 17.6% | 17.6% | 11.8% | 64.7% | 29.4% | 5.9% | 0.0% | % of total pool |

Seriously Considered Composition

Seriously Considered by Gender

| Male | Female | Decline to State | Unknown | Total |
|---|---|---|---|---|
| 5 | 1 | 0 | 0 | 6 |
| 83.3% | 16.7% | n/a | n/a | % of respondents (6) |
| 83.3% | 16.7% | 0.0% | 0.0% | % of total seriously considered |

Seriously Considered by Race/Ethnicity

| African American | Hispanic | Asian | Native American | Minority Total | White | Decline to State | Unknown | Total |
|---|---|---|---|---|---|---|---|---|
| 0 | 1 | 0 | 1 | 2 | 3 | 1 | 0 | 6 |
| 0.0% | 20.0% | 0.0% | 20.0% | 40.0% | 60.0% | n/a | n/a | % of respondents (5) |
| 0.0% | 16.7% | 0.0% | 16.7% | 33.3% | 50.0% | 16.7% | 0.0% | % of total seriously considered |

Short List Composition

Short List by Gender

| Male | Female | Decline to State | Unknown | Total |
|---|---|---|---|---|
| 5 | 1 | 0 | 0 | 6 |
| 83.3% | 16.7% | n/a | n/a | % of respondents (6) |
| 83.3% | 16.7% | 0.0% | 0.0% | % of total seriously considered |

Short List by Race/Ethnicity

| African American | Hispanic | Asian | Native American | Minority Total | White | Decline to State | Unknown | Total |
|---|---|---|---|---|---|---|---|---|
| 0 | 1 | 0 | 1 | 2 | 3 | 1 | 0 | 6 |
| 0.0% | 20.0% | 0.0% | 20.0% | 40.0% | 60.0% | n/a | n/a | % of respondents (5) |
| 0.0% | 16.7% | 0.0% | 16.7% | 33.3% | 50.0% | 16.7% | 0.0% | % of total seriously considered |

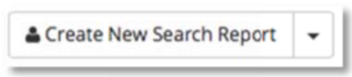
Short List

| Name | Status |
|---|---|
| Davis, Bridget | Accepted offer |
| Fau, Eune | Offered |
| Beatty, Mina | Proposed candidate |
| [illegible] | Proposed candidate |

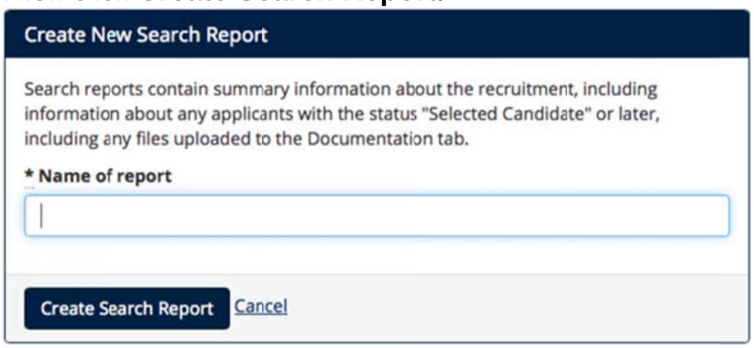
# Search Reports

## Generating a Search Report

1. Click the button, **Create New Search Report**. Or click the down arrow to preview before creating it.




2. When creating a new report, you'll be asked to name the report.
3. Then click **Create Search Report**.




4. A running tally is kept of all Search reports generated throughout the search.
5. The "Download" link opens a PDF of the Search report.
6. Color-coded boxes at the top of the screen cue you to the report's approval status.

## Search Report Components:

The following is a list of the components to be bundled into a Search Report. Much of this information will have been input as part of the Search Plan.

1. **The recruitment details:** General information including the recruitment name, department name, and recruitment period, etc will be automatically pulled into the Search report from the Plan.
2. **Information about selected candidates:** Salary control number assigned (senate positions), school/college, department, discipline/field (senate positions), anticipated start date, percent time, level of appointment (senate positions), title/rank/step (non-senate positions), salary (non-senate positions) and candidate's CV will be included in the report.
3. **Evidence of advertisements:** The list of all locations where the advertisement was published, posted, or distributed, as part of the search will be included in the report. This field is in the Advertisement section of the recruitment's Search Info. (For senate searches, provide verification of ad publication and payment in a national professional journal (online or in print)).
4. **Letters & Memos:** All letters/memos/written recommendations etc that have been uploaded into the Documents section of the recruitment's Search Info will be included in the report.
5. **Interview materials:** All interview documents or other notes from the interview process uploaded into the Documents section of the recruitment's Search Info will be included in the

report.

6. **Search and recruitment efforts:** Stated efforts that were actually undertaken will be included in the report. This field is in the Advertisement section of the recruitment's Search Info.
7. **Applicant Disposition Reasons:** Disposition reasons comments for all unqualified applicants and reasons & comments for all qualified applicants who did not move further in the hiring process are included in the report.

## Report Approvals

### Submitting a First Round of Approvals

Submit the Applicant Pool, Shortlist, and the Search reports for review at different points of the search (ex: prior to interviews for the diversity reports and after selection of final candidate for the Search reports).

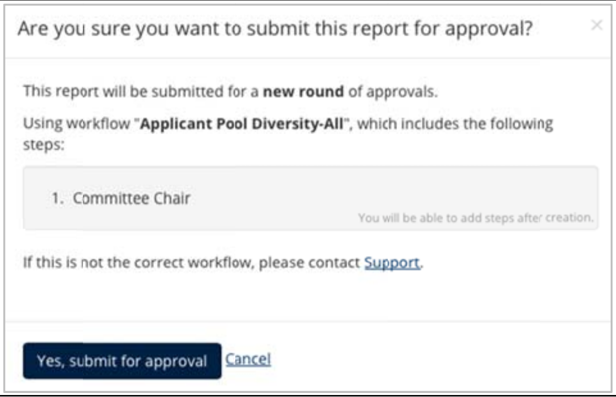
1. On the Reports screen, click the Applicant Pool, Shortlist, or the Search Report tab.
2. Click "Submit for approval."
3. A workflow may have already been added for you. Make sure all roles are assigned names of people in those roles. If not, specify a person.
4. Add any additional steps or alternate approvers if needed.
5. If needed, use the Comments section to communicate with your approvers.

**Note:** Automatic email notifications are sent to approvers and cc'd to analysts submitting the reports. Notifications include a direct link to the approval screen where approvers may download the report, comment, and approve. When the system detects an approval, the next in line will be notified. See Appendix A, *"How Approvers Use Recruit"* and *Appendix B, "Notifications Sent to Approvers."*

### Submitting New Reports

*Scenario*: The search is intended to generate multiple hires for the position. The analyst may create any new report and then submit it for a *new round of approvals*.

1. On the Reports screen, click the Applicant Pool, Shortlist, or the Search Report tab.
2. Click the corresponding button to create the new report. The new report will appear in the Date Generated column.
3. Click the link, "Submit as new approval." The following confirmation box opens.



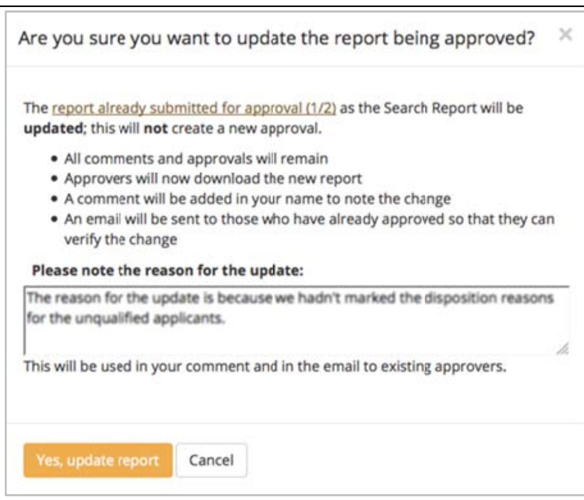

**What this does:**

- RECRUIT sends email notifications to approvers (those who have not voluntarily opted out of notifications).
- Approvers will download the new report, leave a comment, and approve.

## Correcting Reports and Updating the Approvals

*Scenario*: The analyst has submitted a report for approvals but an approver along the way finds a mistake. The analyst can correct any kind of report and pick up where it was left off in the workflow.

1. First, gather any documents and make all necessary changes to correct the report.
2. On the Reports screen, click the Applicant Pool, Shortlist, or Search Report section.
3. Click the corresponding button to create the new report. The new report will appear in the Date Generated column.
4. To replace the corrected report with the previous report already in transit, click the link “Update approval.” The following dialog box opens:




**What this does:**

- Email notices are sent to any previous approvers (who have not voluntarily opted out of notifications).
- Approvers will now download the new report.
- A comment on the approval screen will be added to note the change. All original comments are retained too.
- Approvers will not be required (or able) to re-approve. See Appendix B, “*Notifications Sent to Approvers*.”

# The End of the Search

## Inactivate the Recruitment

The search is complete when a candidate has formally accepted the offer and the person is processed into the payroll system. At this point, analysts should “inactivate” the recruitment. This effectively hides the entire recruitment, applicant pool, comments, etc. from all reviewers. For security reasons, this end-of-search task is especially critical if your search committee was designated as All Department Faculty.

1. Click **Recruitments** in the top menu bar and find the recruitment on the page.


2. Click the link, **“**Make inactive”:

| JP # | Name | Department | Submission Dates | Actions |
|---|---|---|---|---|
| JPF01603 | ASST. PROFESSOR IN PHYSICAL CLIMATE<br>Recruitment Details Diversity Reports Search Committee Applications (95) | Earth System Science | Open<br>9/19/2011 - 6/30/2012 | Make Inactive |

The Make Inactive link effectively archives the recruitment.

## Re-activate the Recruitment

If you need to see old recruitments, it is not difficult to bring them back.

1. Using the filter panel, place a checkmark next to “Show Inactive” and click the Filter button.

2. Now locate the recruitment in the list.

3. Click the link, **“**Make Active**”** in the **Actions** column. This recruitment is available once again to manage as before and the intact applicant pool is visible to the reviewers.

# Appendix A

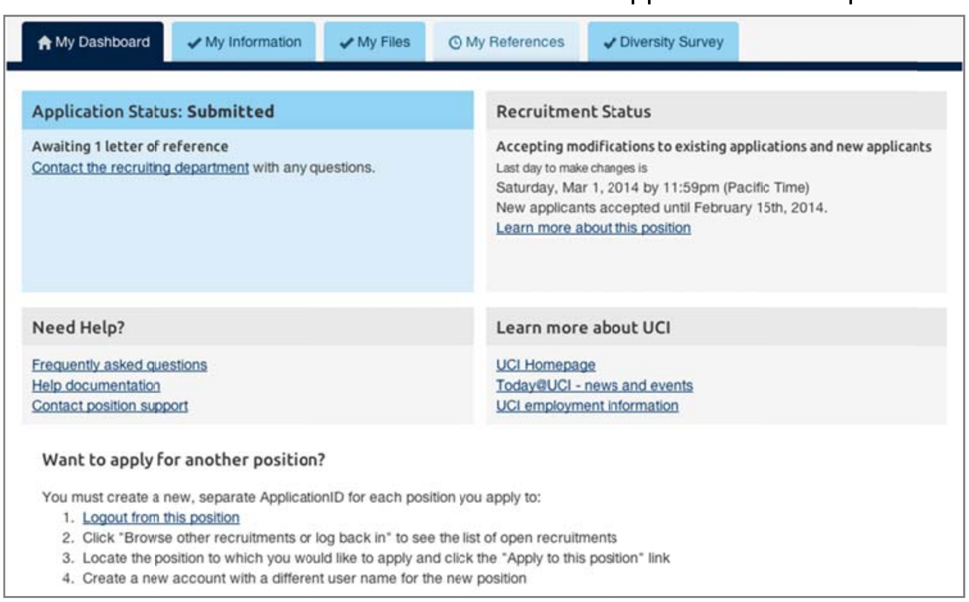
## How Applicants Use Recruit

- Browsing applicants locate the recruitment on Recruit's apply page https://apol-recruit.ucsd.edu/apply Preferably they click the direct link which is provided wherever the position is advertised.
- They create their ApplicantID (unique username and password).
- They fill in their contact information, highest degree information, current employment information, etc. After clicking "Create Account," they are brought to their Dashboard.
- They provide files and references. Documents must be uploaded as PDF files. Other valid file types include: zip, jpg, rar, tif, mov, bmp, 3gp, png, wmv, m4v, mp3, mp4, psd, swf, tiff.
- Applicants returning to modify their application will log in on the apply page with their username and password. Modifications may be made to an application up until the "final date." If applying to an IRD recruitment, the review date acts as their final modification date.
- Applicants who have forgotten their passwords may change it on the apply page by clicking the link in the login box, "Forgot your password?"
- Applicants may apply for multiple positions, however each position requires its own ApplicantID (unique username and password).
- "Contact Us" links appear in several locations before and after applicants are logged in. General and technical questions are sent automatically to recruit@uci.edu. All others are sent to the recruiting department.
- Online Help docs are available to applicants both when they are logged in or not logged into their accounts.

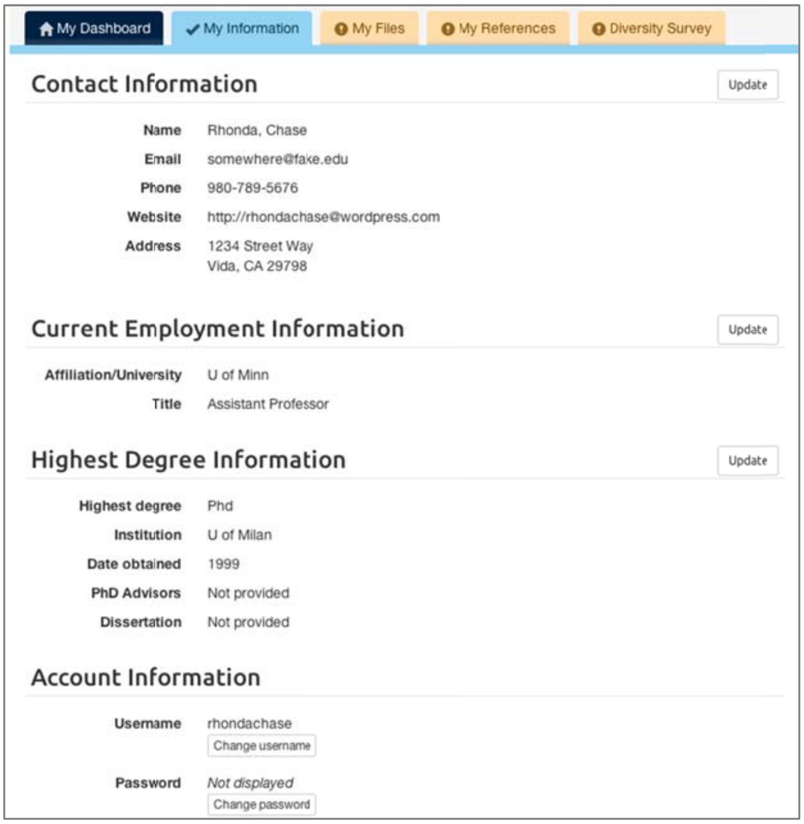
**The Applicant's Dashboard**

Once all requirements are fulfilled, the application is completed and then becomes visible to the committee reviewers. The Application Status on the Dashboard displays "Submitted."

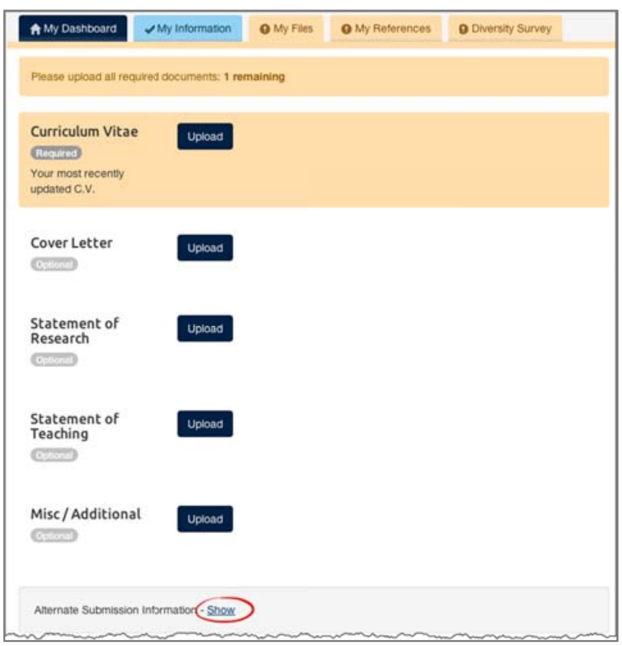
Recruit will send a confirmation email when the application is complete. *See Appendix B.*




**My Information.** The applicant's contact information, current employment information, highest degree information, and account information is editable by the applicant using the “Update” buttons.

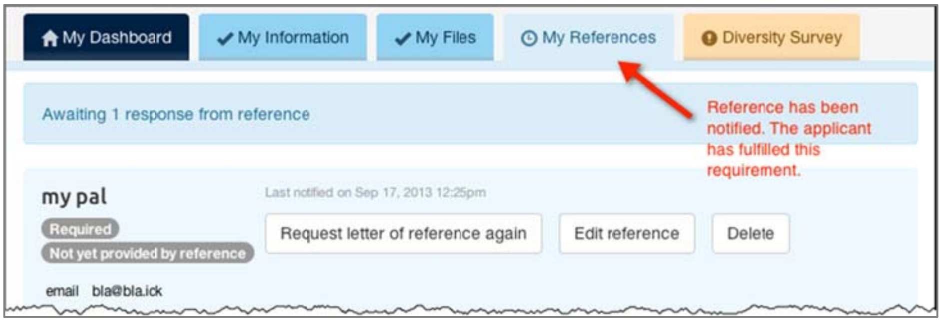



**My Files.** Applicants upload the necessary files using the “Upload Now” link. If an applicant needs to mail in documents via U.S. Postal mail, the “Show” link displays the department address.

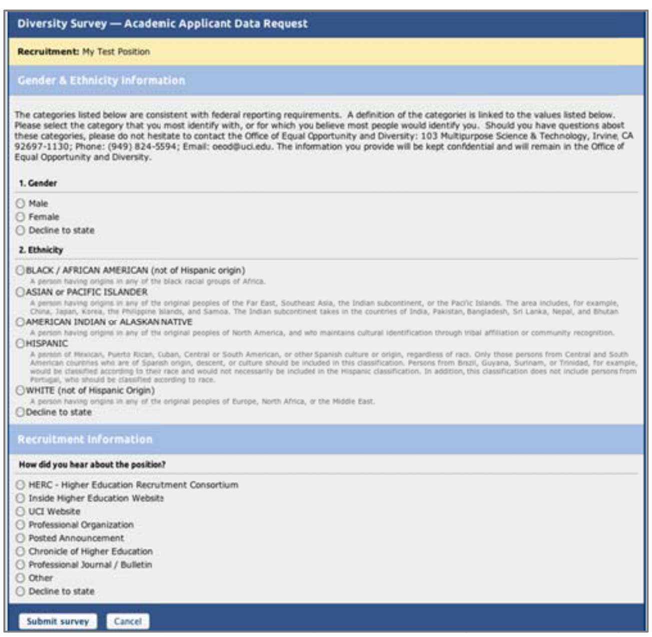



**My References.** When Contact Information Only is required, providing the reference’s name & information satisfies the requirement.

When letters are a requirement, the applicant will be expected to provide the contact information AND request the letter. A completed application is ***not*** contingent on the receipt of the letters. In other words, applicants have fulfilled the requirement for letters once they have requested them. Applicants may re-notify their references at any time, even after the recruitment is officially closed. Applicants can see when letters have been uploaded, but will not be able to view them.




**Diversity Survey.** Applicants read about the Diversity Survey and click the link, “Submit diversity survey” and complete the short survey. Applicants may submit their Diversity Survey at any time, even after the recruitment is officially closed.


## How References Use Recruit

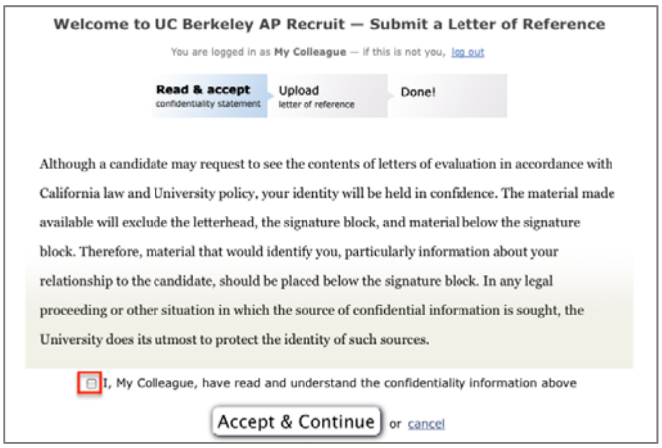
As part of the application process, the Applicant initiates an email request to their references IF letters of recommendation are a requirement. The system sends the email along with instructions to the Reference to log into Recruit and upload a letter.

**Uploading a letter of reference**

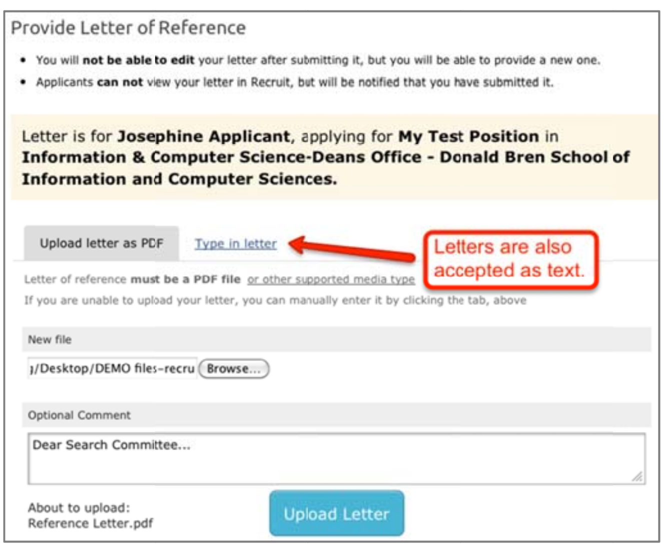
1. References receive an email with the subject line, "UC San Diego Recruit: Letter of Reference Requested"
2. The Reference is instructed to log into Recruit one of two secure ways:

- Using the Easy Login Link OR…
    - Using their email address with a token combination at [https://apol-recruit.ucsd.edu/reference](https://apol-recruit.ucsd.edu/reference)

3. After logging into the system, the University of California Confidentiality Statement is displayed on the screen. The Reference must check the box below it before they can proceed.




4. References will upload their letters or they may type them in. There is no editing capability but references may overwrite their previous letters by logging in as before and replacing their letters.




The Reference provides a letter of recommendation.

- References may upload one file.
- The files must be pdf's.
- The files must be less than 2MB in size.
- Letters are also accepted as plain text (without any formatting).
- A letter cannot be edited after submission, but References can provide a replacement.
- Applicants cannot view the letters in Recruit, but will be notified that they have been submitted.
- Recruit automatically sends a message thanking the Reference for their contribution. This email is editable by the Analyst when they are configuring the recruitment for online applicant management.

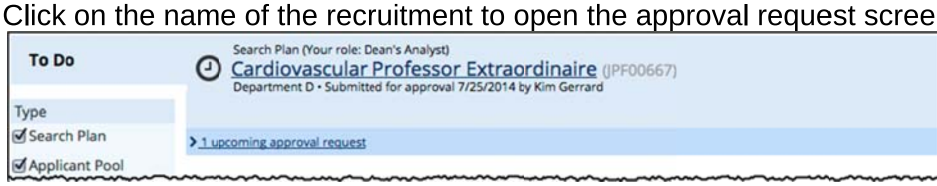
## How Approvers Use Recruit

These instructions are for any faculty or staff who are named as approvers for a SEARCH PLAN, DIVERSITY REPORT, or a SEARCH REPORT. There are two quick ways to reach the approval screen:

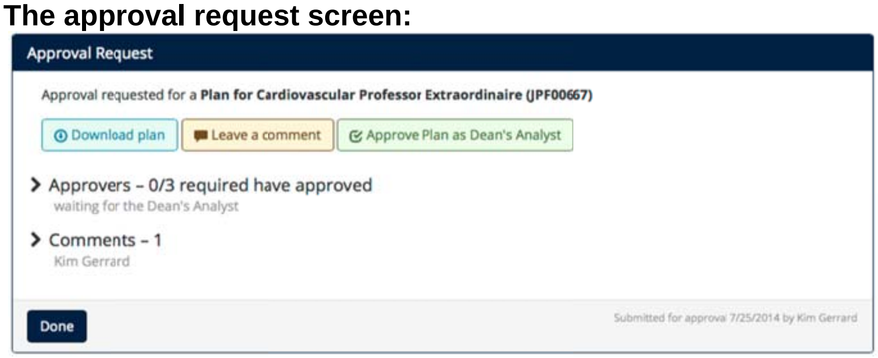
1. **Look for an email from Recruit, Subject: UC San Diego: Approval Request [name of recruitment].**
   - For the exact wording, see Appendix B, *"Notifications Sent to Approvers."*
   - Approvers are prompted to log into Recruit with a direct link given in the email.
   - The approval screen appears where the user will view, approve, or comment on the item.
   - Approvers may opt-out of future notifications using the link in the email.

2. **Or bypass the email and log into Recruit directly**
   - Navigate to [https://apol-recruit.ucsd.edu/](https://apol-recruit.ucsd.edu/) and click "UC San Diego Faculty & Administrators."
   - Once logged in, the Home screen will display the link to any pending approvals:


   - The link opens a personalized "To Do" approval dashboard, filterable by the type of approval. Click on the name of the recruitment to open the approval request screen.




**The approval request screen:**




**Download button:** opens a PDF of the plan or report.
**Leave a comment button:** to leave a comment for the analyst and/or other approvers.


**Approve button:** to approve the plan.
**> Approvers:** displays the identities of any other approvers named in the workflow. The arrow indicates who is the next person in line to approve. Roll over the icons with your mouse to see the approval date and time.
**> Comments:** expand the comments arrow to read comments left by others.

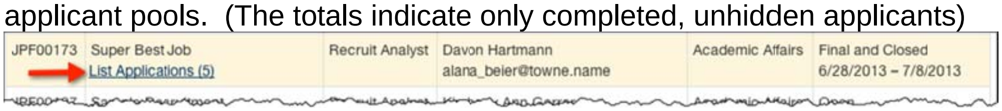
## How Committee Reviewers Use Recruit

Committee reviewers log in using the UC Faculty & Administrators link on the RECRUIT homepage:

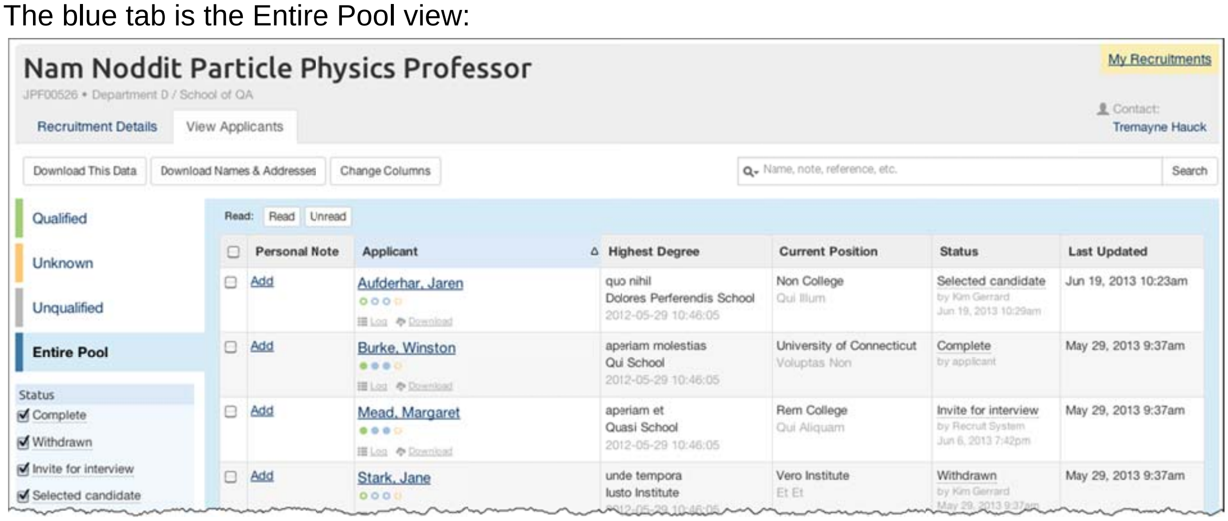

A Faculty Reviewer's Quick Guide is available for download in the sidebar on the Home page.


Reviewers click on **Applications** from the menu at the top of their screen.


Those recruitments to which the reviewer has been given access are listed with direct links into the applicant pools. (The totals indicate only completed, unhidden applicants)

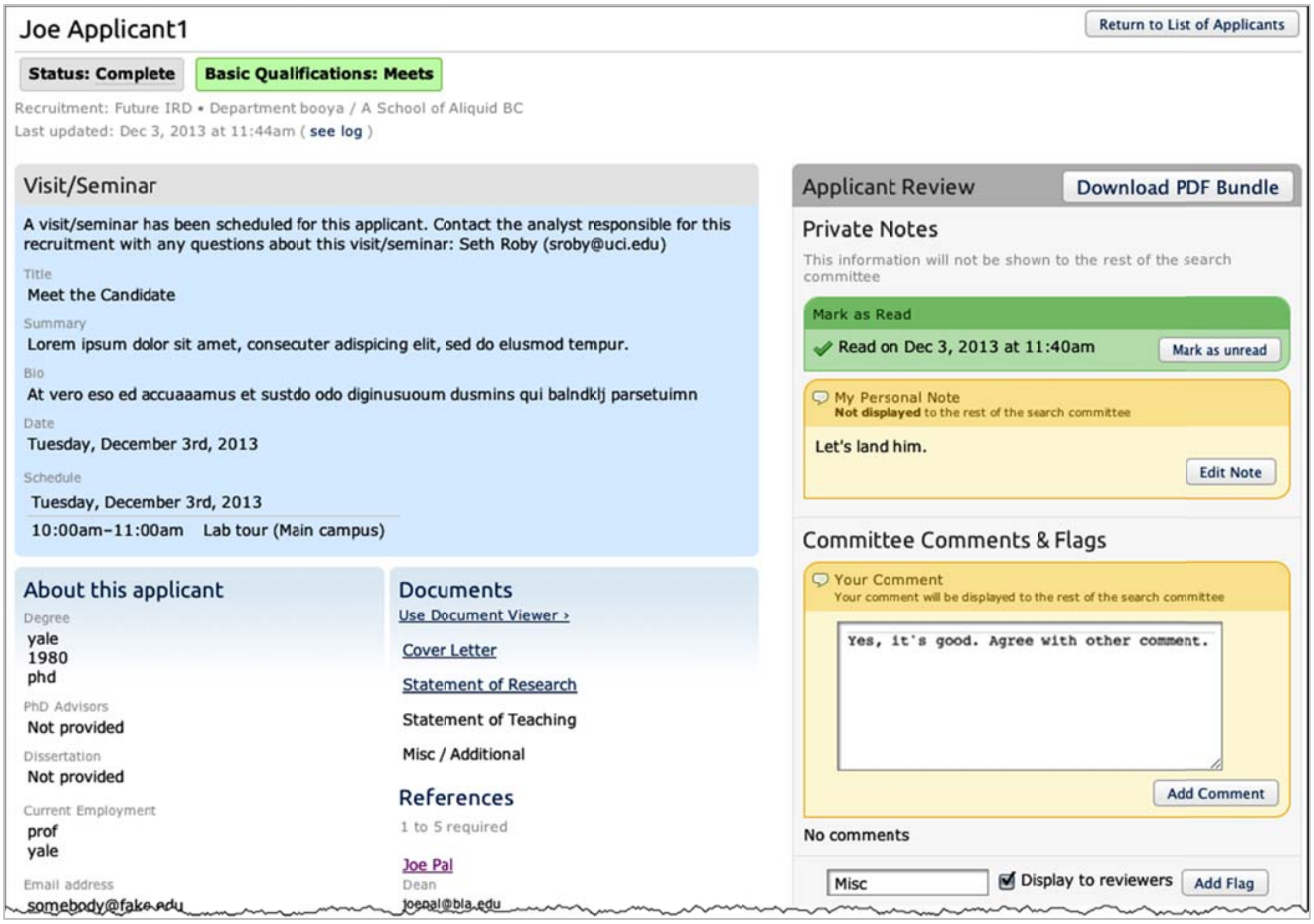



The blue tab is the Entire Pool view:



## Reviewing the Applications

Reviewers click on the name of an applicant to reveal their application and the following view opens:




## The Parts of the Application:

**1. Visit/Seminar**

- If a Visit/Seminar has been scheduled, the summary and schedule will appear prominently in the middle section of the review screen.

**2. About this applicant** (left side)

- The applicant's employment, degree and other information is found in this section.

**3. Documents** (center section)

- The center of the review screen contains the applicant's required or optional documents. There are THREE methods to reviewing the documents:

- ***Viewing Method 1 (recommended):*** Click the button, "Download PDF Bundle" at the top right of the page. This recommended method downloads a PDF bundle of all documents, including watermarks that provide document types, applicant's name, and the name of person creating the PDF. Interstitial pages appear in between each document with the title and any information about the document (if available).
- **Viewing *Method 2:*** Click on the hyperlinked filename to download the document to your computer.

- ***Viewing Method 3:*** Click the link, "Use Document Viewer". This will open the applicant's documents within the browser frame. *The document viewer tool may be affected by browser versions and third party PDF readers. If you have trouble viewing any file, use the Download PDF bundle link (use viewing Method #1).*

4. **References** (center section)
   - Below the documents section, find any references' names and letters (if letters have been required).
   - If the applicant has not yet requested a letter, this will be indicated below the Referee's name, "Letter of Reference not yet requested".
   - Either click the hyperlinked name of the Reference to download the letter. Or download the entire PDF bundle of documents and letters. Or use the Document Viewer link.

5. **Applicant Review – Private Notes**
   - Click the button, **Mark as Read** to cue you that you have looked at this application.
   - Jot a personal note to yourself about the applicant.
   - Mark as Read and Personal Notes are NOT displayed to the rest of the search committee.

6. **Applicant Review – Committee Comments**
   - Type or update your comment in the box provided in the **Your Comment** section.
   - One comment per applicant. You may return and add more text, but it is still considered one comment.
   - Your name will be displayed below your comment.
   - There is no limit on the number of characters permitted in the comment field.
   - Comments are displayed to the rest of the search committee.

7. **Applicant Review – Flags**
   - Any user may flag an applicant by typing into the **Add Flag** box.
   - Your name will be displayed below your flag.
   - Flags are by default, displayed to the rest of the search committee.
   - Analysts, committee chairs, and editors can place flags that are not visible to the reviewers.
   - Unlike comments, **flags** are intended to be a unique set of labels applied to applicants to help categorize them. You may not use the *same* flag for one applicant.

# Appendix B

## Notifications Sent to Applicants

1. **The application has been started.**
   - Sent to applicants when they start their application.
   - Will be suppressed if the analyst added the application.
   - If IRD recruitment, includes a notation, "To ensure full consideration complete by [review date]."
   - If IRD recruitment, includes a notation if application was submitted after the review date. See sample below.

**Subject: UC Recruit: Application Started**

```
Dear [applicant name],

Thank you for starting an application for [Recruitment name] at the University of
California, XYZ.
<<< INSERTED FOR IRD RECRUITMENT >>>
To ensure full consideration, please complete your application by [review date].
<<<END OF TEXT FOR IRD RECRUITMENT>>>

========================
Your Application Details
========================
Your username: [username]
Login link: [Link to applicant login]

Recruitment Name: [recruitment name]
Department: [department name]
School: [school name]

<<< INSERTED FOR IRD RECRUITMENT if submitted after the review date has passed >>>
Note that at this time no additional review dates have been scheduled, so your application
may or may not be considered by the search committee.
<<<END OF TEXT FOR IRD RECRUITMENT>>>

You may continue to modify your application until [Date]. After [Date], no further updates
are allowed.

===================
Questions?
===================
If you have any questions about your online application or the process, please contact us.

    [link to contact form]

Thank you for your interest in the University of California, Irvine.

UC Recruit Team
University of California, XYZ
```

2. **Thank you for completing your application.**
   - Sent to applicants a few hours after they complete their application.
   - Will be suppressed if applicant was *manually completed* by the department.
   - Includes any modification dates.
   - If IRD recruitment, includes warning that modifying after a certain date could disqualify them from consideration.
   - Includes a reminder to take the diversity survey if the system detects it has not been taken.

**Subject: UC Recruit: Application Complete**

```
Dear Hilda Haythere,

<<<< INSERTED ONLY IF SURVEY HAS NOT BEEN SUBMITTED >>>>
Please complete a one-page survey to help us meet our
obligation as a federal contractor.
    [Link to Diversity Survey]
 <<<<< END OF TEXT FOR THE NON-SURVEY TAKERS >>>>>

Thank you for successfully submitting your application!
```

```
===================
Application Details
===================
Position Name: Adolescent Psychology Assistant Professor
Department: Psychology & Social Behavior
School: School of Social Ecology

Username: [Applicant's username]
Status: Submitted
Login link: [Link to applicant login]

You may continue to modify your application until [Date].
After [Date], no further updates are allowed.
===================
Questions?
===================
If you have any questions about your online application or
the process, please contact us.

    [Link to contact form]

UC Recruit Team
University of California, XYZ
```

3. **<u>Thank you for completing your application and</u> <u>survey reminder.</u>**

- Sent to all completed applicants who have not taken the survey.
- Sent 4-5 days before the recruitment's edit deadline (a final date or review date).

**Subject: UC Recruit: Application Confirmation and Survey Request**

```
Dear Fred Fryer,

We request that you complete the following survey by [Date].
This survey helps UC meet our obligation as a federal
contractor.

   [Link to Diversity Survey]
===================
Application Details
===================
Position Name: Associate Professor - Biochemistry
Department: Biochemistry
School: School of Biological Sciences

Username: [applicant's username]
Status: Submitted
Login link: [Link to applicant login]
You may continue to modify your application until [Date]. After
[Date], no further updates are allowed.
===================
Questions?
===================
If you have any questions about your online application or the
process, please contact us.
   [Link to contact form]

UC Recruit Team
University of California, Irvine
```

**4. Deadline approaching – completion reminder.**

- Sent to all incomplete applicants ~3 days before the recruitment's edit deadline (a final date or review date).

**Subject:  UC Recruit: Application Completion Deadline Approaching**

```
Dear Al Applicant,

Thank you for starting an application for [position] at the
University of California, XYZ.
To ensure full consideration, please complete your application by
Sep 18, 2013

========================
Your Application Details
========================
Your username: [applicant's username]
Login link: [Link to applicant login]

Recruitment Name: [XYZ]
Department: [Pediatrics]
School: [School of Medicine]

===================
Questions?
===================
If you have any questions about your application or this
recruitment, please contact us:

 [Link to Contact form]

Thank you for your interest in the University of California,
Irvine.

UC Recruit Team
University of California, XYZ
```

5. **Application is in the system.**
   - Sent to applicants who were added by an analyst, provided the analyst asks for the system to notify the applicant.

**Subject: UC Recruit: An application has been submitted on your behalf**

```
Dear Joanne Jones,

An application has been established on your behalf for the position
noted below and is on file at the University of California, Irvine.

Position Name: Assistant Professor - Atmospheric Chemistry
Department: Chemistry
School: School of Physical Sciences

--
[Analyst signature]
University of California, XYZ
```

6. **Access your application**
   - Sent to applicants who were added by an analyst when the analyst activates the application to allow the applicant to log in.

**Subject: UC XYZ Recruit: Access Your Application**

```
Dear Joanne Jones,

The application that was created in your behalf is ready for your
inspection and/or management.

Position Name: Assistant Professor - Atmospheric Chemistry
Department: Chemistry
School: School of Physical Sciences

To access your application, log on within 72 hours by using the
following link:
        [Link to log in]


This will direct you to a page displaying your ApplicantID (login name)
with an opportunity to choose a confidential password. This link will
```

```
expire in 72 hours.

--
[Analyst signature]
University of California, XYZ
```

7. **Notification of a new, optional document request.**
- Asks an applicant to log in and provide a document that was added after the recruitment opened
- Sent to all applicants, complete or incomplete.
- A date to provide the document is provided.

**Subject: UC Recruit: Optional Document Requested**

```
Hello Jane Stark,

You are being sent this email because you applied to the following
position at the University of California, Irvine:

        Recruitment: Professor of Lorem Ipsum
        Department: Department D

Please note that the hiring department has requested that you provide a
new, optional document:
        [Optional document title]

You have until [Date] to provide this document. Log into your application
here:
        [Link to log in]

More information from the hiring department:
[Custom text provided by department when requesting new letter]

If you have any questions, please contact the hiring department directly:
       [Link to contact form]

Thank you for your interest in the University of California, Irvine.

--
[Analyst signature]
University of California, XYZ
```

8. **Notify applicant of password reset**
- Provides for an applicant who has forgotten their password to reset it.
- Initiated by applicant using “Forgot your password?” tool on the Apply page.

**UC San Diego Recruit: Password Reset**

```
Dear Jane,

You requested to reset your password for UC San Diego’s Recruit system. Please visit the
following link in order to complete this task:

        [Link to reset/confirm password]

Note that this link will expire within 72 hours of your reset request.

Thank you for using Recruit.
--
[Link to Recruit apply page]
```

## Notifications Sent to References

1. **Request a letter of recommendation from the reference (applicant-initiated).**
   - Asks the reference to log in and submit a letter.
   - Applicant can re-send request until the final date or review date.

**Subject: UC Recruit: Letter of Reference Requested**

```
Hello Dr. Reference,

[Applicant's name] is requesting a letter of reference from you for a position at the
University of California, XYZ in the [Name of department].

Applicant Name: [Name of applicant]
Applicant Email: [applicant's email]
Applicant Notes: [Custom text provided by applicant]

Position Name: Adolescent Psychology Assistant Professor
Department: Psychology and Social Behavior
School: School of Social Ecology, UC Irvine

At your convenience, please consider providing this letter electronically by using the
following information:

Easy Login Link:
        [Link to direct upload after reading Confidentiality Statement]
If the Easy Login Link isn't working, try logging in with the following information:

URL: [link to Recruit's reference login page]
Email: [the reference's email]
Token: [unique-identifier-alpha-numeric string]

Please read the University of California's confidentiality policy regarding external
letters of recommendation:

Although a candidate may request to see the contents of letters of evaluation in
accordance with California law and University policy, your identity will be held in
confidence. The material made available will exclude the letterhead, the signature
block, and material below the signature block. Therefore, material that would identify
you, particularly information about your relationship to the candidate, should be
placed below the signature block. In any legal proceeding or other situation in which
the source of confidential information is sought, the University does its utmost to
protect the identity of such sources.

At your convenience, please consider submitting a letter of reference using the
information above.

Thank you for your time,
University of California, XYZ
```

2. **Request a letter of recommendation from the reference (department-initiated).**
   - Asks the reference to log in and submit a letter.
   - This ability is only available if the reference requirements are set to “Contact only.”
   - Department may re-send at any time.

**Subject: UC Recruit: Letter of Reference Requested**

```
Dear [Reference name],

You are invited to submit a letter of reference for [applicant name] for the position of [recruitment
name] at the University of California, XYZ.

At your convenience, please consider providing this letter by emailing it to [department address].

Please read the University of California's confidentiality policy regarding external letters of
recommendation:

Although a candidate may request to see the contents of letters of evaluation in accordance with
California law and University policy, your identity will be held in confidence. The material made
available will exclude the letterhead, the signature block, and material below the signature block.
Therefore, material that would identify you, particularly information about your relationship to the
candidate, should be placed below the signature block.  In any legal proceeding or other situation in
which the source of confidential information is sought, the University does its utmost to protect the
identity of such sources.
```

```
Thank you for your time.

[Analyst signature]
University of California, XYZ
```

**3. Reference thank you.**

- Thanks the reference for providing a letter.
- Initiated by the reference's upload action.
- Informs reference that the letter will become part of the applicant's appointment file if an offer of employment is extended.

**Subject: UC Recruit: Thank you for your contribution**

```
Dear [Reference name],

Thank you for submitting a letter of recommendation. Your letter is now available on-
line for viewing by the faculty search committee.

We would like to include your letter in the appointment file when an offer of
employment is extended. If you have any concerns about this, please contact [analyst's
name and email].

[Analyst signature]
University of California, Campus XYZ
```

## Notifications Sent to Approvers

**Approver's notification.**

- Approvers who are next in line in the workflow receive the email.
- If a step is approved before it is the current step, the email is suppressed.
- Approvers are never emailed twice for the same request.
- If there are multiple people listed in a step (alternates), all receive the email simultaneously.
- The email template for optional approvers have slightly different wording: "Your approval is *requested* instead of *required*."
- When a current step is approved and if the next step is marked as optional, all potential approvers for the next mandatory step are sent the email.
- Submitters of the item (Plan, reports, etc) receive a 'cc of these emails.

**Subject: UC Recruit: Approval Request: [Associate Professor of Chemistry [JPF00123]**

```
Hello [Approver name]

Your approval is required for:
Recruitment name: Associate Professor of Chemistry (JPF00123)
Approval request for: Applicant Pool Report
Your role: Committee Chair

To view, approve, or comment on this request please visit:
[Link to approval screen]

If you have any questions, please contact the user who requested the approval:

[Analyst's name, email]

To change how you are notified about approvals, click here:
[Link to change notifications]
```

**Approver's notification – Updated Reports**

- Approvers who have previously approved a diversity or search report are sent an email if the report has been updated.
- The notification is an FYI and not a request for a re-approval.

```
Subject: UC Recruit: Approval Update: [Associate Professor of Chemistry [JPF00123]

Hello,
A document you have approved has been updated.
Recruitment name: Associate Professor of Chemistry (JPF00123)
Approval request for: Search Report
Your role: Equity Advisor
You approved: 9/3/2014 at 12:27pm

The reason for the update is because we hadn't marked the disposition reasons for the
unqualified applicants.

Your approval still stands. However, if you wish to view or comment on the changes,
please visit:
[Link to approval screen]
If you have any questions, please contact the user who requested the approval:

[Analyst’s name, email]

To change how you are notified about approvals, click here:
[Link to change notifications]
```

**Notification of completed approvals**

- Email is sent to the submitter of the item (Plan, reports, etc.) when all required approvers have signed off.
- Email also informs recipient of the next steps to take.

```
Subject: UC Recruit: Approval Complete: [Associate Professor of Chemistry [JPF00123]

Hello,
Your request for approval is complete!
Recruitment name: Associate Professor of Chemistry (JPF00693)
Approval request for: Search Plan

To view this request, please visit:
[Link to approval screen]

Your next steps:
*Publish the recruitment so that applicants can start applying.
*Monitor incoming applications and mark each as meets basic qualifications or does not
meet basic qualifications.
*Assign disposition reasons to applicants who do not meet basic qualifications.
*Submit the applicant pool report for review and approval by the search committee
chair at least one week before the close date to assess if additional outreach is
needed before closing the recruitment.

--
Message generated by UC Irvine AP Recruit

To change how you are notified about approvals, click here:
[Link to change notifications]
```

## Supporting Recruit’s End-Users

Recruit technical supporters (those with Administrator access) will see inquiries with these subject lines:

- Subject: UC Recruit: Question (Technical)
- Subject: UC Recruit: Question (General)
- Subject: UC Recruit: *Reference* Question (General)
- Subject: Recruit: Contact Us

Analysts will see inquiries sent to their department. The subject line displays the name of the recruitment. Administrators will receive a copy of these messages but they are intended for the department to respond to. Example:

| | |
|---|---|
|   | **Note:** Always check the footer of the email you receive. The system provides time-stamps and other helpful sender information for supporters to address the email. |

There are numerous locations where an applicant can find the “Contact Us” link (in the footer, on the top of help pages, etc). One point of contact is beneath the recruitment name on the Apply page, where a person who is not logged in can send a question (Figures A-D).

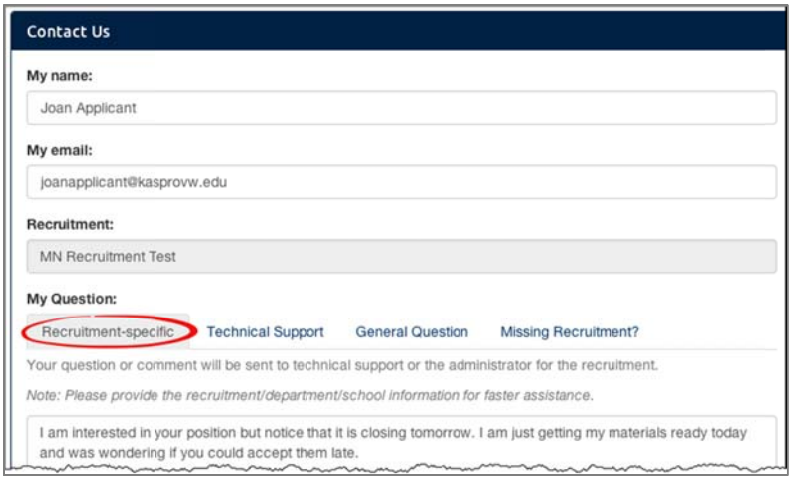



**Figure A**: The “Contact Us” form to use with a question directed to the department. (person is not logged in)

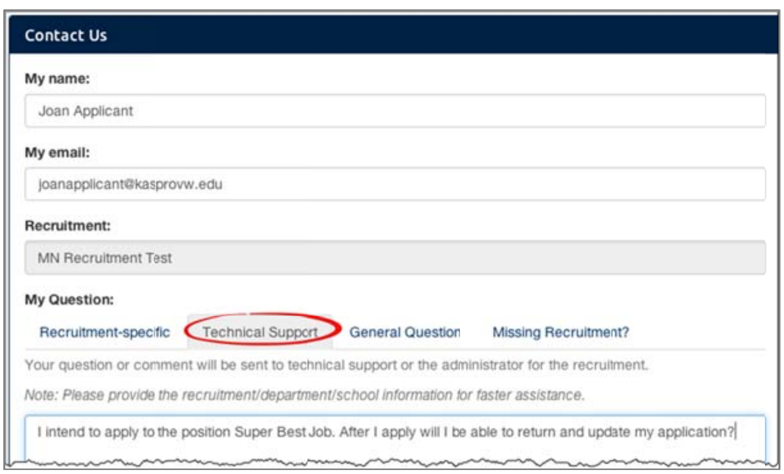



**Figure B**: The “Contact Us” form to use with a technical question. (person is not logged in)

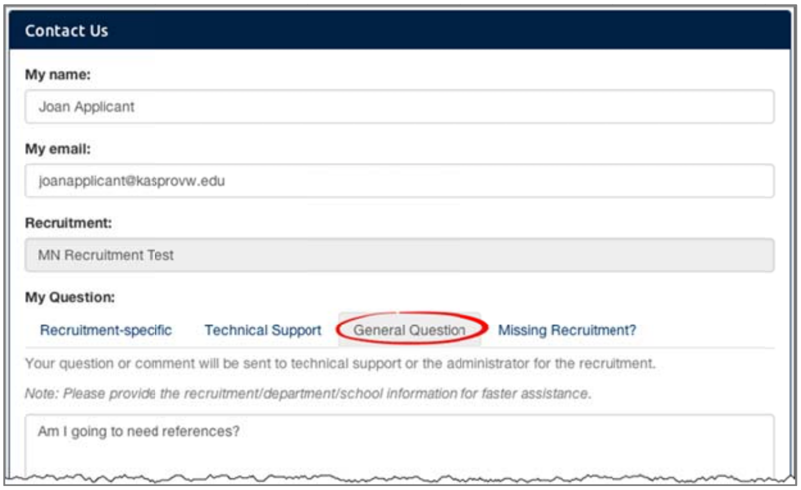



**Figure C**: The "Contact Us" form to use with a question that is general. The technical staff will receive this. (person is not logged in)

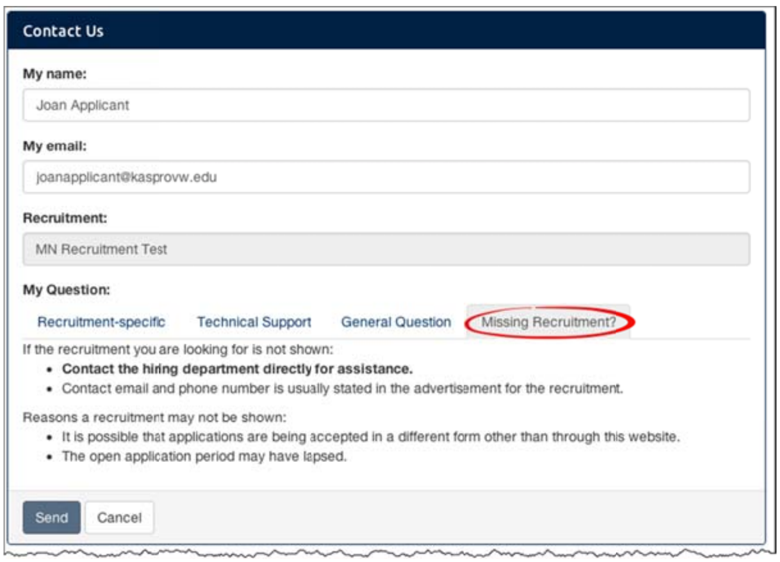



**Figure D**: Applicants who cannot locate a position on the Apply page are given instructions to contact the department for assistance.

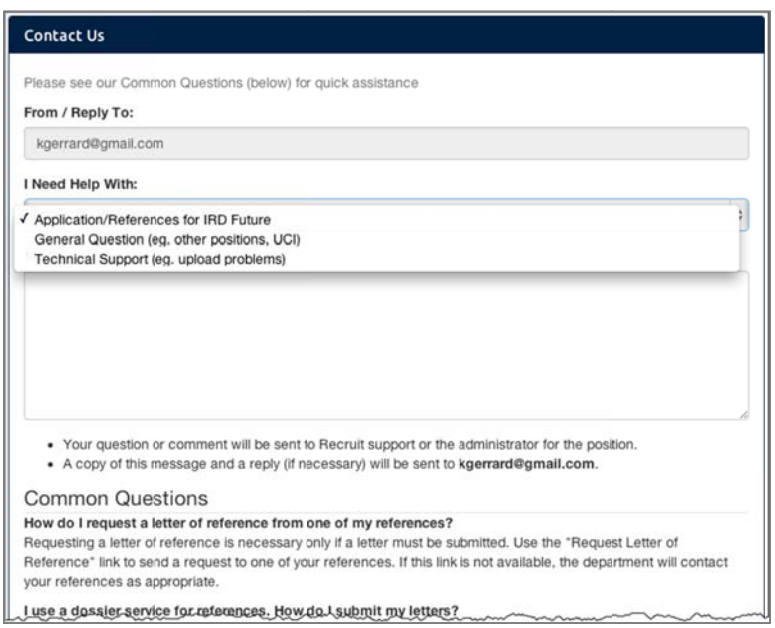


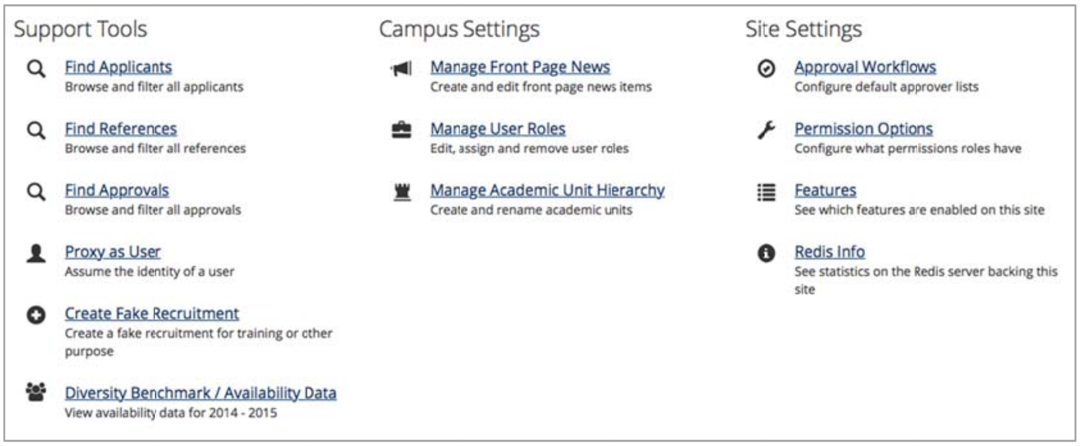

**Figure E** Mail is routed to the proper person when the applicant chooses from the drop-down menu. (person is logged in)

# Appendix C

## Special Tools for Recruit Administrators

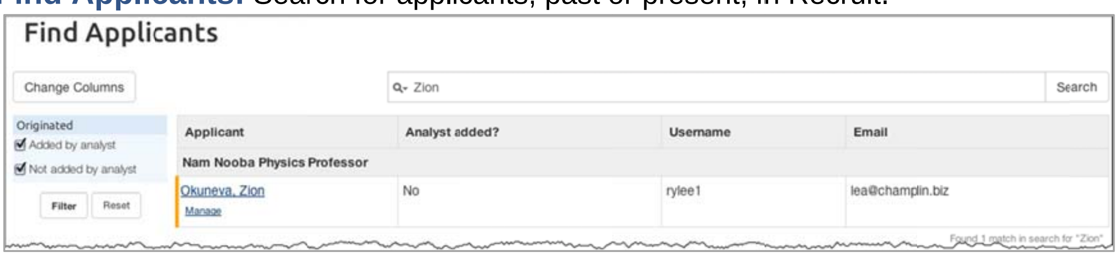
1. Click **Admin** in the top menu bar:


2. The list of available administrative tools depends on your role/access rights:



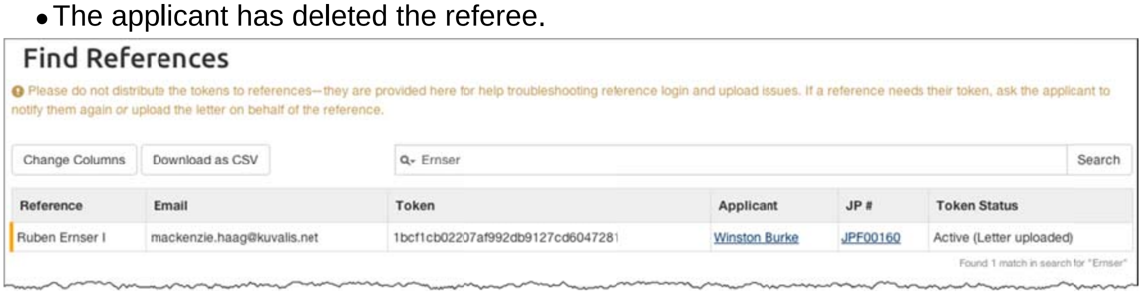

Menu shows administrative tools that are available, depending on user's role.

**Find Applicants:** Search for applicants, past or present, in Recruit.




**Find References:** Search the Reference logs. This information is used to determine if:

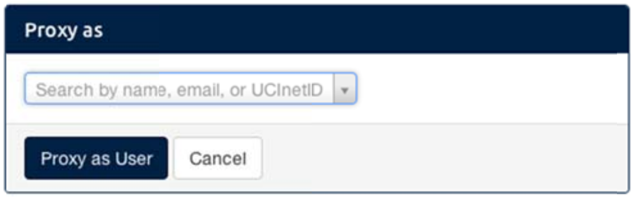
- The token has been input incorrectly.
- The letter has not yet been requested.
- The applicant has revoked the request for a letter.
- The applicant has deleted the referee.




**Note:** Please do not distribute the tokens to references—they are provided here for help troubleshooting reference login and upload issues. If a reference needs their token, ask the applicant to notify them again or upload the letter on behalf of the reference.

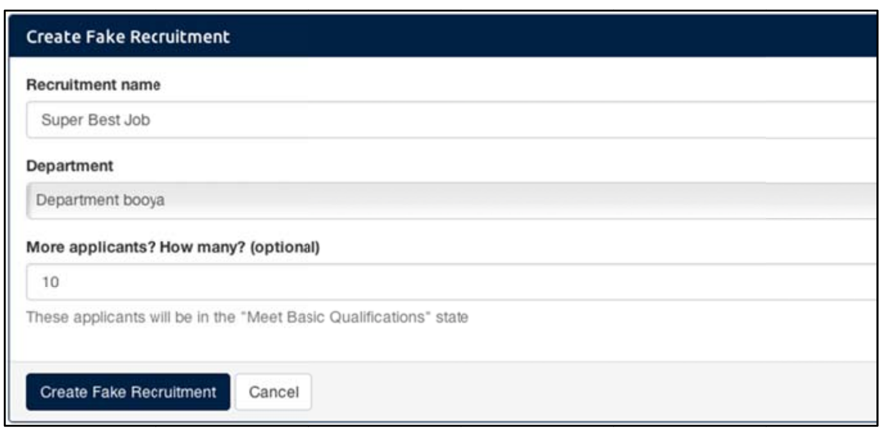
**Find Approvals:** Administrators may browse and filter all approvals across all recruitments. Note: This tool brings Recruit admins to the Approvals screen, also reachable via the top menu bar.

**Proxy as User:** Assume the role of any user in Recruit.




**Create Fake Recruitment:** This tool makes it easy to quickly create a published recruitment for training purposes. It is only available on the *training* site. The tool automatically assigns recruitment dates, title codes, specialties, documents/letter requirements as well as generating a list of applicants in various states of completion. ***Recruit Administrator*** or *Trainer* access is required for this activity.

1. Log into your campus Recruit training site.  The tool is not available on the live, production site.
2. When prompted, give your fake recruitment a name and choose a department.

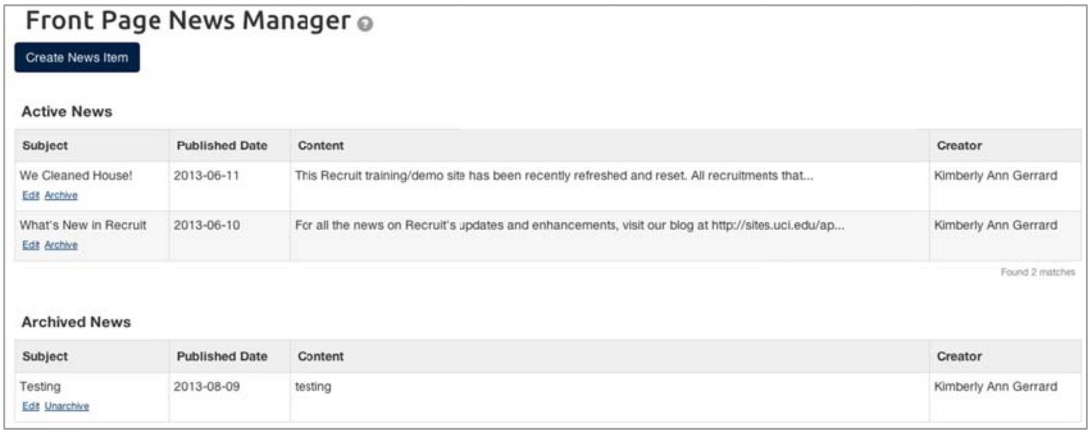


This admin tool may be used when training Analysts to use Recruit.

## Diversity Benchmark/Availability Data

Find complete, numeric diversity benchmark data for the current year. When analysts create a new recruitment, they select one or more specialties and enter title codes. This raw data is used in the Applicant Pool and Shortlist reports to display availability percentages that most closely match the specialty and title.

**Manage Front Page News:** Use this tool to write, edit, publish, and archive news items on the Home page that users will see after they log in. These posts are visible to all users except applicants and references. Post training dates, planned downtimes, holiday support notices, application enhancements, special instructions, or other announcements.



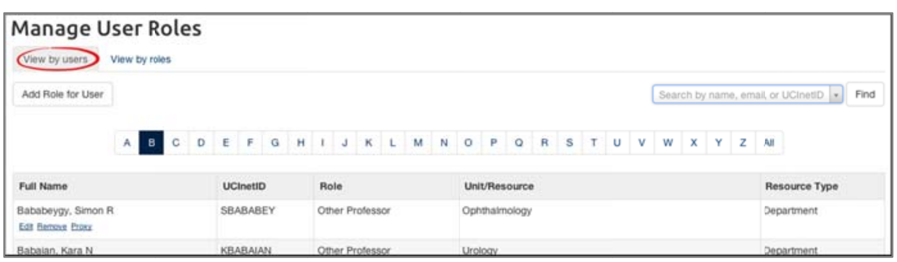
This admin tool's interface shows current and archived news posts along with a "Create New Item" button.

**Manage User Roles:** This tool manages Recruit users and their roles.
All faculty and employees (including student employees) will have access to Recruit because they are part of a nightly data feed, but they do not have the ability to do or see anything in Recruit until they have been given a role. This tool enables you assign roles, edit existing roles, and remove user access. ***Recruit Administrator*** or ***Recruit User Manager*** access is required for this activity.

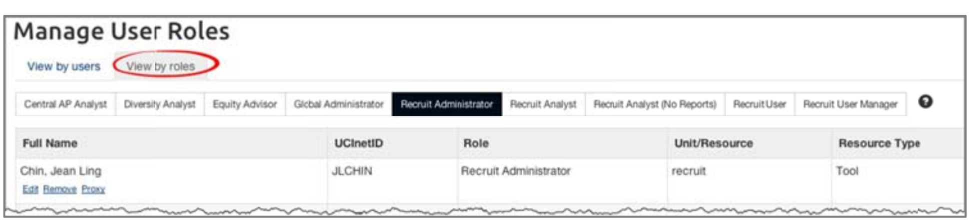
The following example assigns the School Analyst role. A School Analyst has all the access rights of the Department Analysts within his/her school.

In the Manage User Roles admin tool...
1. Click the button, "Add Role for User."


2. Search for the person by name, email or UCInetID.
3. Select a user role from the drop down menu.
4. Choose a resource type from the drop down menu.
   **Note:** Most of the time, select either Department or School. Committee roles will be assigned by the Analyst as part of the search Plan. Choose "Tool" when assigning roles across the system.
5. Click "Save" when finished.
6. Type their name and click "Find" to confirm that the user is in the alphabetical listing.



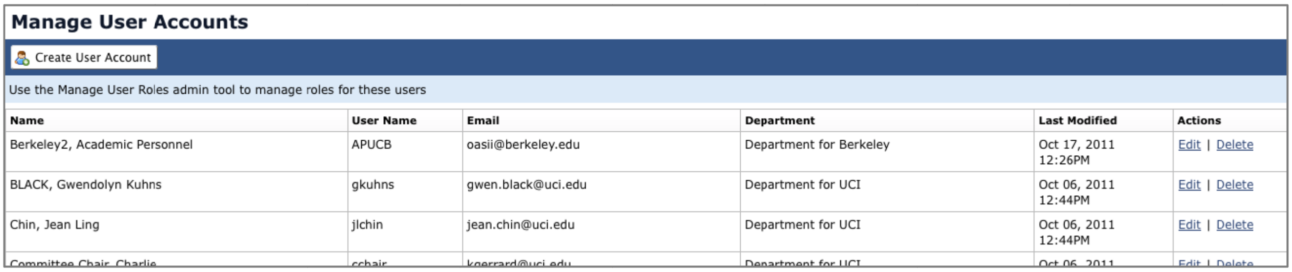
Locate users by their sign-in name on the "View by users" tab.



Locate users by their roles.

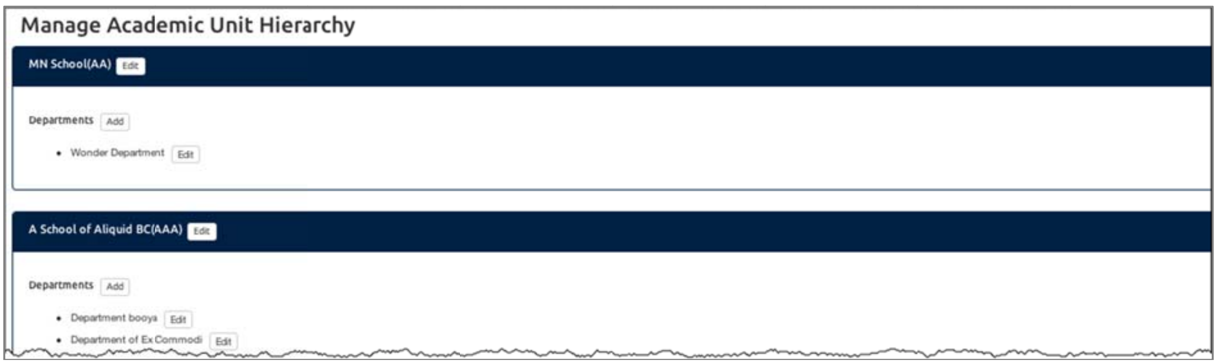
## Manage Users:

*NOTE TO OTHER CAMPUSES USING RECRUIT:* This tool is only available if Recruit is configured on your campus for local authentication. Under Shibboleth, Recruit expects to be fed user directory data so this tool would be unavailable in order to prevent overwriting data.




Create, edit, and delete user accounts when Recruit is configured for Local Auth.

**Manage Academic Unit Hierarchy:** Use this tool when Departments, Schools or Divisions change their names or the data feed needs correcting. **Warning:** Incoming data feeds could overwrite any manual entries.  Currently this tool offers no way to delete and must be done by a programmer.




Use Manage Academic Unit Hierarchy to add new Departments or Schools.

**Adding a New Department:**

- Find the School listed on the page and click the link, “Add Department”.
- Name the department.
- Provide an identifier. This is typically the payroll home department code.
- Click “Add”.
- Use the “Edit” link to change this information at any time.

**Adding a New School:**

- Scroll to the bottom of the page and click “Add another school...”
- Name the school.
- Provide an abbreviation. This arranges the sorting of schools on the Apply page.
- Provide an identifier (any string of up to 32 characters).
- Click “Add”.
- Use the “Edit School” link to change this information at any time.

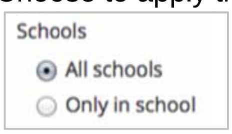
**Approval Workflows: Recruit administrators may design approval workflows for search plans and reports based on best business processes. The workflows will then be shown to analysts to ensure approval processes remain consistent and compliant.**

1. **Click Create New Approval Workflow.**

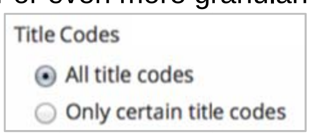

2. **Give the workflow a descriptive name. This name is shown to analysts before they create the approval submit section.**


3. **Use the drop-down selector and choose a context: Search Plan, Diversity Report (Applicant Pool), Diversity report (Shortlist), or Search Report. Select "All" to have a catchall workflow when the other workflows you've designed won't fit for whatever reason.**

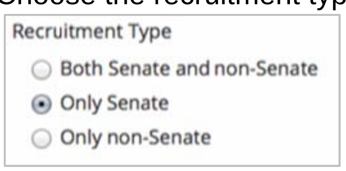

4. Choose to apply this workflow to specific schools or choose All Schools to apply globally.




5. For even more granularity, choose condition based on Title Codes.

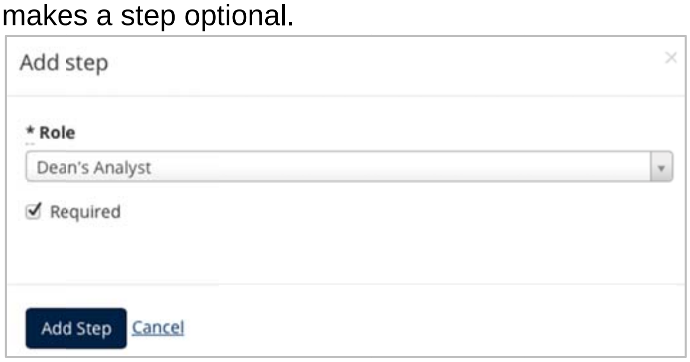



6. Choose the recruitment type: Only Senate, Only non-Senate, or Both Senate and non-Senate.




7. Click the link on the right side of the screen, "Add step."


8. ...and choose the role from the drop-down selector. When you uncheck the "required" box, it makes a step optional.



9. Click "Add Step" when finished adding the steps. The workflow will be applied to all future approval requests that meet this criteria.

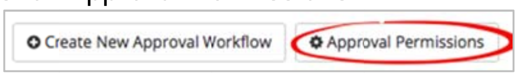
**Editing an Approval Workflow:** Edits will not change any approval workflow that is currently in use.

1. Click "Edit" below the workflow name.
2. Make changes to the context and conditions.
3. Steps may added or deleted.
4. Reorder steps by dragging the icon into place. Save the changes.
5. To remove the workflow completely, click the button **Delete this workflow**.

**Assign Specific Persons to Steps:** See the instructions for using the admin tool, **Manage User Roles.** Use the tool to assign specific people to their roles so that they are automatically pulled into the workflows that you have designed.

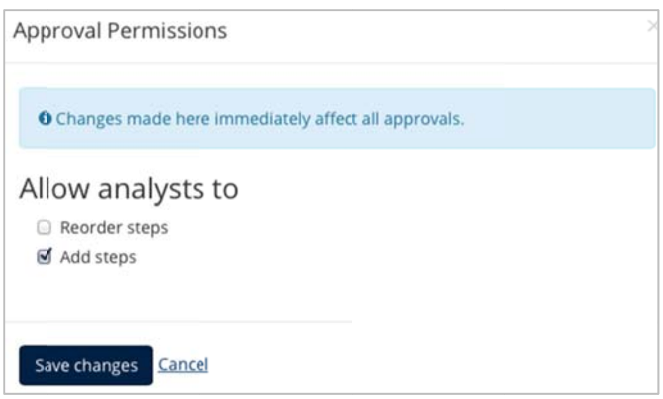
**Restrict Analysts from Reordering/Adding Workflow Steps:** This admin tool ensures that the analyst cannot modify the workflow design. Restrictions take effect immediately, affecting any in-progress approvals.

1. Click Approval Permissions.




2. By default, analysts may reorder the workflow steps or add steps. Restrict either one of these abilities by unchecking the corresponding boxes. Click Save changes.

6.




**Permission Options: Customize which permissions are available to the system's users. Who can publish a plan? Who can create and manage diversity reports?**

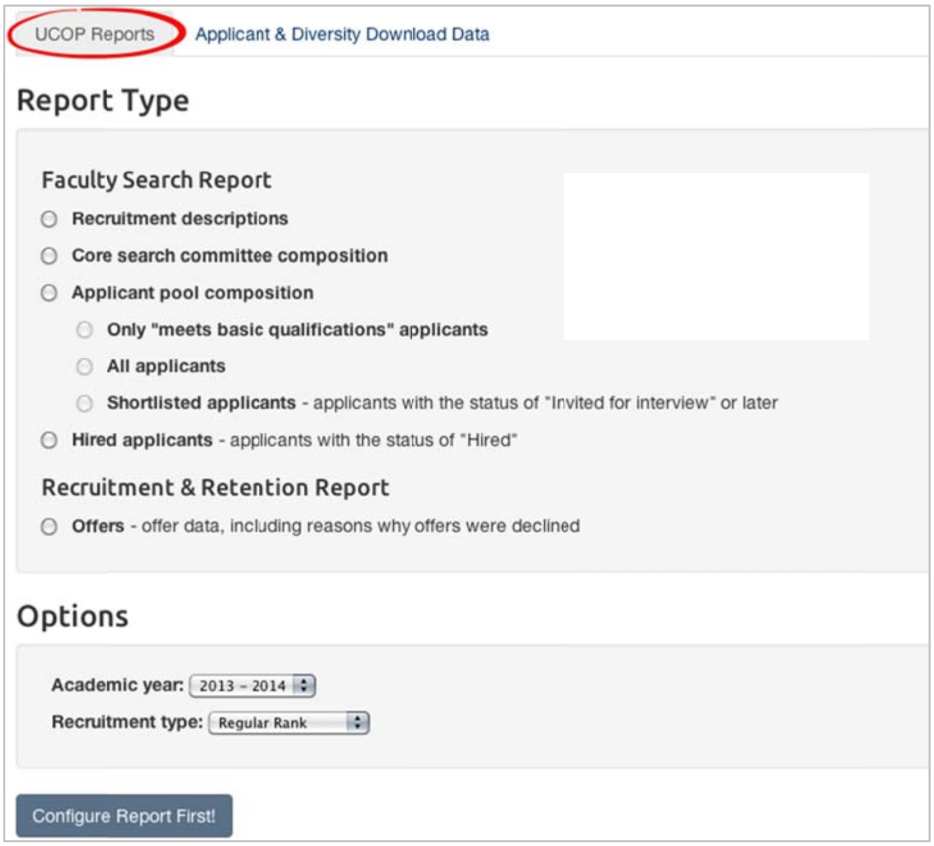
**Features: See which of Recruit's optional features are enabled. Contact the Recruit team at UCI to enable any features you would like to enable.**

# Administrative Reports

Start with **Reports** in the top menu bar:


Reports are grouped by those required by UCOP and the Applicant & Diversity Reports.

## UCOP Reports



All administrative reports available. Choices depend on your particular admin role.

## Faculty Search Report:

○ **Recruitment descriptions**

- This report shows information on all recruitments in a given academic year such as position name, department name, initial search allocation, search breadth, title codes, etc.
- ***Recruit Administrator*** **or** *Central AP Analyst* access is required for this activity.
    1. Choose **Recruitment descriptions.**
    2. Choose the **academic year** from the drop-down menu.
    3. Choose Regular Rank, Non-Regular Rank, or All Rank from the drop-down menu.

○ **Core search committee composition**

- Download a report containing diversity data on unnamed core search committee members. Core members are those individuals who were listed on the campus recruitment planning form and have been added to the search committee in Recruit by the Analyst. Gender and ethnicity for these individuals are derived from a central data feed.

- ***Recruit Administrator*** **or** *Central AP Analyst* access is required for this activity.
  1. Choose **Core search committee composition.**
  2. Choose the **academic year** from the drop-down menu.

○ **Applicant pool composition**

- Create a spreadsheet with the data required by UC's Office of the President, consisting of applicant diversity information. The report shows the total number of responses given for gender and ethnicity per recruitment.
- ***Recruit Administrator*** **or** *Central AP Analyst* access is required for this activity.
  1. Choose **Applicant pool composition.**
  2. Choose between: "Only meets basic qualifications applicants", "All applicants", or "Applicant pool shortlisted applicants".
  3. Choose the **academic year** from the drop-down menu.

○ **Hired candidate composition**

- Download a report of all hired applicants in a given academic year.
- ***Recruit Administrator*** **or** *Diversity Analyst* access is required for this activity.
  1. Choose **Hired candidate composition**
  2. Choose the **academic year** from the drop-down menu.

## Recruitment and Retention Report:

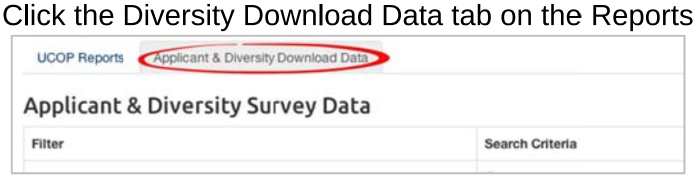
○ **Offers**

- Download a report of those applicants who have been offered positions in a given academic year and if they accepted or declined (mapped to selected reasons). Analysts generate the data in this report when they update an applicant's status.
- ***Recruit Administrator*** **or** *Diversity Analyst* access is required for this activity.
  1. Choose **Offers**
  2. Choose the **academic year** from the drop-down menu.

## Applicant & Diversity Download Data

- Create a spreadsheet showing all diversity survey responses for a given academic year.
- The filter-able report will show all applicants for a given recruitment including applied, completed, shortlisted, and non-shortlisted.
- As this report is so encompassing, it possibly *will not* match the per-position diversity report data.
- ***Recruit Administrator*** **or** *Diversity Analyst* access is required for this activity.

1. Click the Diversity Download Data tab on the Reports page.




2. Filter by Academic Year by selecting from the dropdown menu.
3. Click the plus signs to filter other criteria including job number, open date, close date, final date, and survey submission date.
4. Click **Download Data**

Note: If you do not add any filters, then all data will be downloaded. This could take a while!