OADEO

UCSD e-RP Help Manual

Table of Contents

I.   General Information

A.   What is AP On-Line *e-RP*?

AP On-Line Recruitment Plan (*e-RP*) is an electronic program to process and approve recruitment plans for open academic positions.

B.   Who will have access to AP On-Line *e-RP*?

Only those individuals who have one of the following assigned roles are allowed to access and participate in *e-RP*:

Roles	Definition
MSO/DBO	The MSO/DBO has the responsibility to assign all persons within the department who may create and change recruitment plans. Such personnel will most likely be the department academic personnel analyst who will serve in the role of Recruitment Plan Submitter. An additional individual may be assigned in the same role to serve as a back-up. See guideline for these actions below.
Recruitment Plan Submitters (academic personnel analyst and unit head)	• The analyst will create the plan in *e-RP* in preparation for review by the department chair. • The head of the recruiting/hiring unit, e.g., the chair of an academic department, will review and approve the plan in *e-RP* at the unit level and submit the plan to OADEO. For academic departments, *e-RP* includes a default by which the department chair is automatically identified as the head of the unit and approver. For other units, e.g., a college, an ORU, etc., the staff will need to identify the name of the unit approver. At the discretion of the department chair, the responsibility of unit approver may be delegated to another person in the department, for example, the vice chair, the MSO, or the department academic personnel analyst.
OADEO Reviewer	The Administrative Specialist in OADEO has the role of doing the initial examination of the recruitment plan.
OADEO Endorser	The Director of OADEO has the role of reviewing and endorsing the recruitment plan for review and approval by the dean's office.
Faculty Equity Advisor (FEA Reviewer)	The FEA reviews the recruitment plan for ladder-rank faculty searches, and as may be appropriate, interacts with the department chair, the search committee, and/or the dean. OADEO provides clearance for FEAs to access *e-RP*.
Dean's Office Reviewer	Staff in a dean's office will assume the role of reviewing the recruitment plan before forwarding it to the dean for final approval. OADEO provides clearance for reviewers in the deans' offices to access *e-RP*.

| Final Approver | The dean has the role of giving final approval of the proposed recruitment plan. At the discretion of the dean, this responsibility may be delegated to another person in the dean's office. OADEO provides clearance for the dean to access *e-RP*. |

II.   MSO Instructions

A.   Guidelines for MSO/DBOs to make a role assignment of Recruitment Plan Submitter

1.   Use your UCSD Single Sign-On to go to the home page of *e-RP*.
2.   Click the "Assign Roles link.

3.   On the Assign Roles Web page, select the Academic Recruitment Plan Submitter from the drop down menu.

4.   Choose the unit (department, division, ORU, program, etc.) you wish to assign to a particular Recruitment Plan Submitter.

5.   In the search box for Find a Person**,** type in the last name and a few letters of the first name of the person you wish to assign as a Recruitment Plan Submitter. Click the Search button.

6.   Choose the Assign link at the right side of the selected employee to complete the assignment of Recruitment Plan Submitter.

7. Should an error be made, simply click the Unassign link beneath the Action heading.

8. Close the program, and notify the new Recruitment Plan Submitter that the role assignment has been completed. Access has now been granted to start and submit a new e-Recruitment Plan.

III.   Before You Start

A.   Summary of steps in using *e-RP* to create a recruitment plan

There are seven steps in using *e-RP*, and each step is identified by a section tab in the system:
1. Identifying the hiring unit (Hiring Unit tab)
2. Creating the ad text (Ad Text tab)
3. Defining the outreach effort (Advertising/Outreach tab)
4. Naming the members of the search committee (Search Committee tab)
5. Adding files (Files tab)
6. Identifying who in the hiring unit will approve the recruitment plan (Unit Approval tab)
7. Reviewing the proposed plan before submitting it to the unit approver (Review tab)

Note: This manual provides instructions for completing each page in *e-RP*. Similar instructions are also provided on each page of the *e-RP* Web site.

B.   Information to assemble before starting a recruitment plan in *e-RP*

As a staff person serving in the role of Recruitment Plan Submitter, it is advisable to assemble the following information before you begin to develop a recruitment plan in *e-RP*:
1. FTE amount (e.g., 1.0 or 0.5 FTE) and position number (if relevant and available)
2. The ad text that will be used to publicly announce the position. (It is advisable to have the ad in Text format rather than in a Word doc format. The complex formatting in Word will be in conflict with the e-RP program. In addition, have ready any shortened versions of the ad that are intended for smaller postings.)
3. Names of journals, newspapers, and Web sites in which the job will be announced as well as any other projected outreach efforts, such as conferences, flyers, or direct contact.
4. The names of those individuals who will serve on the search committee.

IV.   Accessing *e-RP* : Home Page

One may read about *e-RP* and access the e-system via the Academic Personnel On-Line Services page:
http://academicaffairs.ucsd.edu/aps/apol/apolinfo.htm

To access the program directly, please enter the following Web address in your browser:
http://academicaffairs.ucsd.edu/Modules/Adeo/Recruitment/.

Use your UCSD Single Sign-On (username and password) to access the *e-RP* home page.

Click either the Submit Recruitment Plan tab (blue tab) or click the Submit a Recruitment Plan link.
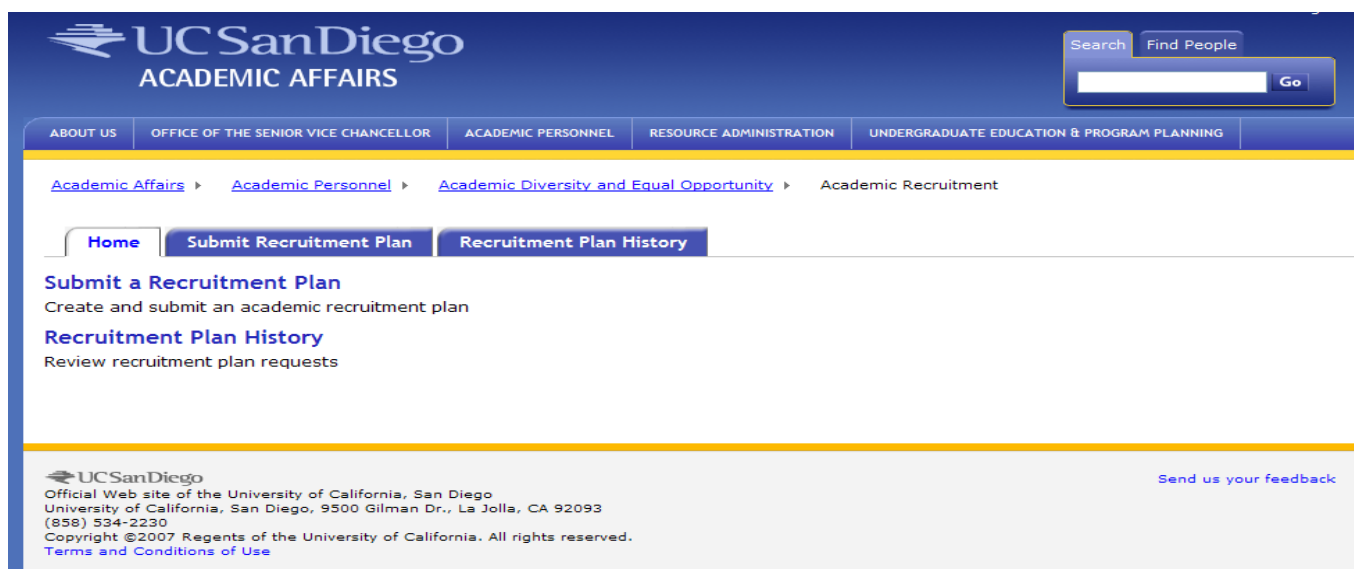
After you have completed your recruitment plan, you can always come back to this page and look at all of your open recruitments by clicking on the Recruitment Plan History link or tab. It is from this link that you can delete any recruitment plans that have been cancelled.

V.   Hiring Unit(s)

On the Hiring Unit(s) page, select:

1.   The name of the school or division
2.   The name of the hiring unit (department, ORU, etc.)
    - In selecting a department as the hiring unit, the name of the department chair will appear on the Unit Approval page by default.
    - There is no default to name a unit approver on the Unit Approval page when one selects something other than an academic department, for example, a division within a department or an ORU.
3.   The name of the program (if relevant)
4.   The position number (if known or available; a position number is often assigned once the recruitment plan arrives in the dean's office.)
5.   Functions of the three buttons at the bottom of the page:
    - The Next button saves the data and takes one to the next page.
    - The Save Data button is designed for situations when one has to leave *e-RP*, has not completed the page, but would like to save the information that has been entered and to return to *e-RP* at a later time.
    - The Cancel Recruitment Plan button cancels the recruitment plan and deletes data that have been provided.

See Web page screen shot on the following page.

VI.   Ad Text

Using the table below, provide appropriate text for the each box on the Ad Text page of *e-RP*. This text will be the text posted on the UCSD Academic Job Opportunities Bulletin as well as the text to be posted in journals and Web sites. See section IX. Files if you wish to submit a version of the job notice tailored for a specific journal or Web site.

Please note: Directly copying text from a Word document (.doc or .docx) and pasting it into one of the boxes on the *e-RP* site usually results in text with inappropriate formatting. Therefore, it is advisable to first save the draft of a job posting in Plain Text format and to use that text as your source for copying/pasting.

Section Title	Description
Position Title	Enter the proposed position title and rank, such as Assistant, Associate, or Full Professor, Researcher, Librarian, Lecturer, etc.
Description (Ad Text)	Enter the proposed ad text describing the job and the criteria needed to be considered.
Salary	The box is for the salary statement, for example, "Salary is commensurate with qualifications and experience," or "Salary is based upon UC pay scales." Avoid making specific references to dollar amounts.
Closing Date	A closing date is necessary and is based on the day that occurs three weeks after the date the last posting will be made public. The preferred text is, "Review of applications will begin (date), and continue until the position is filled."
To Apply	Enter contact and submission information, e.g., UCSD mailing address, materials to be submitted. Also consider entering a URL to receive and process applications electronically, e.g., via AP On-Line *Recruit* (https://apol-recruit.ucsd.edu/).
AA-EOE	An equal opportunity statement is required. Choose from the three listed versions (the first option is preferred).
Disciplines/(Area(s) of Interest	Briefly state the specialty or discipline of the position.

VII.   Advertising/Outreach

On this page, list all proposed efforts to publicly announce the job opportunity — journals, Web sites, flyers, conferences, etc. Please specify if the posting will be on a Web site or in a printed journal, for example, include "(Web)" or "(Jrl)" after the name of the posting resource. Please also note that OADEO will post the job notice on the UCSD Academic Job Opportunities Bulletin and with the So. Cal. Higher Education Recruitment Consortium. Please include these as advertising sources on *e-RP*.

| ABOUT US | OFFICE OF THE SENIOR VICE CHANCELLOR | ACADEMIC PERSONNEL | RESOURCE ADMINISTRATION | UNDERGRADUATE EDUCATION & PROGRAM PLANNING |

Academic Affairs ▸   Academic Personnel ▸   Academic Diversity and Equal Opportunity ▸   Academic Recruitment ▸   Submit Recruitment Plan

Recruitment Plan for an Academic Position

Please use this form to create your recruitment plan. If you would like to review or edit an existing recruitment plan, you may find it here.

Complete each section before proceeding to the next. After completing a section, you may go back to it by clicking on the navigation tab below. After completing every section, you will be able to review your recruitment plan before submitting it for approval.

| Hiring Unit(s) | Ad Text | Advertising/Outreach | Search Committee | Files | Unit Approval | Review |

In this section, identify all of the advertising and outreach efforts proposed for this recruitment.

Indicate all journals, web sites, listservs, professional organizations/associations to be used to publicize the open position.

1.		10.	
2.		11.	
3.		12.	
4.		13.	
5.		14.	
6.		15.	
7.		16.	
8.		17.	
9.		18.	

Will Notify: ☐ Colleagues   ☐ Departments/Institutions

Notify Via: ☐ Phone   ☐ Letter
                       ☐ E-Mail   ☐ Flyer

Other Efforts:

Describe any advertising or outreach efforts not indicated above.

[Next] | [Save Data] | [Cancel Recruitment Plan]

VIII.   Search Committee

Instructions for selecting members of the search committee are displayed on the *e-RP* Search Committee page and below as well:

Use this section to identify individuals responsible for the search. Each member of the search committee must be a current affiliate of UCSD. Type the person's name (LASTNAME, FIRSTNAME) in the Search box and click the Search button. When the search results appear, select the appropriate function for the individual from the drop-down Role menu. Click the Select link next to the person's name to confirm the entry.

Search Committee Roles:

- **Search Committee Chair** – The Search Committee Chair must be an academic.

- **Search Committee Member** – For most recruitments, a search committee should include three to five members. For small scale recruitments, for example, a principle investigator recruiting to fill a project scientist position in a lab, a committee totaling two people (one serving as the search chair) is acceptable. Search committee members must be academic.

- **Ex Officio Member** – The individual is appointed to the committee because of experience/knowledge. This member may be an academic or staff employee and may or may not be granted voting rights per the discretion of the search chair and other committee members. (*The Ex Officio designation will be added in a future version of e-RP.*)

In this example, a search was conducted using the last name "hamilton, s" that resulted in six people displayed on the screen.

In the image below, the name Stephen Hamilton was selected as the search committee chair from the drop down Role menu. Confirm entry with "Select" (see image on the next page). Repeat process to identify all members of the search committee.

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Hiring Unit(s)	Ad Text	Advertising/Outreach	Search Committee	Files	Unit Approval	Review

Use this section to identify individuals responsible for the search. Each member of the search committee must be a current affiliate of UCSD. Type the person's name (LASTNAME, FIRSTNAME) in the Search form below and click the Search button. When the search results appear, select the appropriate function for the individual from the Role menu and then click the Select button next to the person's name. If a person has more than one role in the search committee, you will need to do this for each role that person occupies on the committee.

Search for a campus affiliate using the form below by typing the person's name (LASTNAME, FIRSTNAME) and clicking the Search button. When the search results appear, select the appropriate role and click the "Select" link next to the person's name.

[hamilton, s]   [Search]
LAST, FIRST MI

Action	Role	Name	Title	Department
Select	Search Committee Member ▾			MEDICINE
Select	Search Committee Member ▾	Redacted		
Select	Search Committee Member ▾			
Select	Search Committee Member ▾	for		
Select	Search Committee Member ▾			
Select	Search Committee Member ▾	privacy		
Select	Search Committee Member ▾	HAMILTON, STEPHEN H	Programmer Analyst	VC-ACADEMIC AFFAIRS

Search Committee Member
Search Committee Chair
Affirmative Action Overseer

[Next] | [Save Data] | [Cancel Recruitment Plan]

Create a Recruitment Plan | Recruitment Plan History
Assign Department Roles

Web Modules: Equity Module | Resource Profiles

IX.   Files

The Files page enables one to search and attach additional documents, for example, a job flyer for a conference or a job posting in which the ad text has been tailored for posting on a specific Web site or journal.

The image on this page displays a confirmation the document has been successfully uploaded and provides an opportunity to upload an additional document.

X.   Unit Approval

On the Unit Approval page, identify the person who will be responsible for approving the recruitment plan to be submitted to OADEO. If a department was selected in the Hiring Unit(s) page, the name of the department chair will appear by default. Otherwise, type in a name by the Search button. Once the search is completed, choose Select to confirm the name.

XI.   Review (and final process steps)

The Review page allows one to review the draft of the recruitment plan. The following describes the possible sequence of subsequent actions:

If changes are needed to the draft, select the Edit Recruitment Plan button, complete the edits, and return to the Review page to view revisions. If the recruitment plan appears to be correct, hit the Submit for Review button.

Selecting the Submit for Review button will automatically generate an email to the chair as a notification for action. The chair may reject the plan if something needs to be corrected. If so, the plan will be returned to the original submitter for revision. Upon the chair's approval, the plan will be forwarded to OADEO.

OADEO will review the proposed recruitment. OADEO has the following three options:

1) Reviewed and Endorsed (With this option, OADEO will forward the plan to the office with the final approval authority, most likely a dean's office)

2) Reviewed but Not Endorsed (OADEO will forward the plan to the dean's office. Most likely the reservations regarding plan will be discussed, resolved, and the plan will be returned to OADEO for endorsement.)

3) Returned to Submitter (OADEO requires action from the unit proposing the plan. OADEO returns the plan to the original submitter for revisions as necessary. The plan is then resubmitted to the department chair for review/approval and then to OADEO.)

The dean's office will review the proposed plan, and if it is acceptable, will approve it. If there are concerns, the plan may be sent back down the chain-of-command for action.

Upon receiving a notice of approval from the dean, the hiring unit should review the plan for any comments made by the reviewing offices; for example, an advisory from OADEO to adjust the closing date in the ad text. The unit may then proceed with posting the job notice in journals, Web sites, etc.

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| Home | Submit a Recruitment Plan | Recruitment Plan History |

Recruitment Plan for an Academic Position

This recruitment plan is Not Yet Submitted. Please review the recruitment plan for accuracy before submitting. You may edit or cancel the recruitment plan by clicking the appropriate button at the bottom of the page. Click the Submit button at the bottom of the form to submit your recruitment plan for review.

RECRUITMENT PLAN OVERVIEW

Status:	Not Yet Submitted
Hiring Unit(s):	Arts & Humanities - Music
Position Title:	Grand Poobah
Discipline(s)/Area(s) of Interest:	Authority

AD TEXT

Position Title:	Grand Poobah
Description:	
Salary:	
Closing Date:	
To Apply:	
AA-EOE:	UCSD is an Affirmative Action/Equal Opportunity Employer with a strong institutional commitment to excellence through diversity.

ADVERTISING/OUTREACH EFFORTS

Journals, web sites, listservs, professional organizations/associations to be utilized to publicize the open position:

Test
Test
Test

Will notify:	**Via:**
Colleagues	Phone
	E-Mail

Other Efforts:

SEARCH COMMITTEE

Name	Role	Title	Department	Email
WELCH, JONATHAN L	Affirmative Action Overseer		VC-ACADEMIC AFFAIRS	welchj@ucsd.edu
HAMILTON, STEPHEN H	Search Committee Chair		VC-ACADEMIC AFFAIRS	shhamilton@ucsd.edu
QUIRK, NATHALIA ANNE	Search Committee Member		VC-ACADEMIC AFFAIRS	nquirk@ucsd.edu

FILES

File	Uploaded By	Uploaded
Sample Ad.docx	NATHALIA ANNE QUIRK	11/12/2008 11:42:04 AM

ACTION

Instructions go here

Additional cc list:	[_____]
	(Optional) Comma-separated list of additional UCSD e-mail addresses to receive notification.
Comments:	[_____]

| Submit for Review | Edit Recruitment Plan | Cancel Recruitment Plan |

Create a Recruitment Plan | Recruitment Plan History
Assign Department Roles

Web Modules: Equity Module | Resource Profiles