

Academic Personnel Recruit

USER MANUAL

Produced by UCIrvine's Office of Information Technology — June 19, 2015

NOT YET BRANDED FOR UC DAVIS

**UC Davis Recruit Help Desk:
ap-recruit@ucdavis.edu**

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

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 UCInetID, UCI's authentication system for the campus community. The UCInetID is automatically generated for all faculty and staff when they enter the payroll system, however it must be activated. If you have never activated your UCInetID, instructions are available at — <https://ucinetid2.nacs.uci.edu/activate/>

Log into to Recruit here — <https://recruit.ap.uci.edu/>

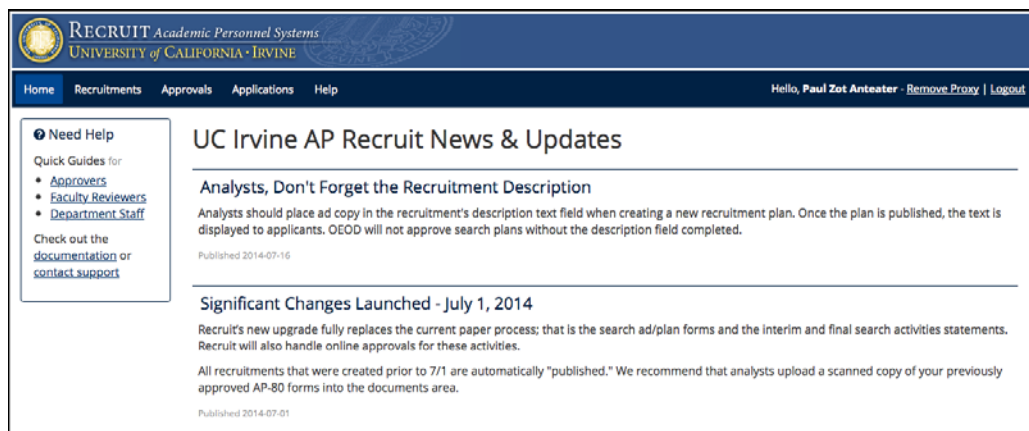
A link to Recruit is also available on UCI's Academic Personnel homepage — <http://www.ap.uci.edu/>
All trainees will use Recruit's training site at— <https://recruit.ap.uci.edu/training/>

1. Click on "UC Irvine Faculty & Administrators."
2. When prompted, authenticate with your UCInetID 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:

Hello, Paul Zot Anteater | [Logout](#)

The top menu choices will differ depending on the user's role in Recruit. If you only see News & Updates, you have not been assigned any role and should contact recruit@uci.edu for help.

[Home](#) [Recruitments](#) [Approvals](#) [Applications](#) [Help](#)

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 primarily review and manage the applicants. Chairs are able to see incomplete applications, mark applicants as “qualified” or “unqualified”, send bulk email to applicants, update applicant statuses, etc. Chairs also may add/edit portions of a recruitment’s information — information that is part of the Search Plan and/or Search Report.

Committee Editors have the same access rights as Committee Chairs.

Search Committee Reviewers primarily review and manage the applicants. They have viewing rights to completed applications and may comment or flag applicants. They have viewing rights to a recruitment’s information, but unlike chairs or editors, reviewers have only *read* access rights.

Equity Advisors This role is often part of the approval workflow for the search plan and reports. They have viewing rights to view completed applications for a given recruitment and can view and create diversity reports. In addition, they can download all-encompassing applicant diversity data.

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

Diversity Analysts This role is often part of the approval workflow for the search plan and reports. They have viewing rights to view completed applications for a given recruitment and can view and create diversity reports. In addition, they can download all-encompassing applicant diversity data.

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

How To Use This Manual.....	2
What You Need to Know Before You Start.....	2
<i>Operating Systems & Browsers</i>	2
<i>How to Log Into Recruit</i>	2
<i>User Roles in Recruit</i>	3
Part 1: Recruitment Management.....	7
Create the Basic Recruitment	7
<i>Open/Closed/Final Recruitments vs. Pool Recruitments</i>	8
<i>Title Codes and Specialties</i>	9
Configure the Recruitment for Online Applications.....	11
Find and View Recruitments	13
Working with the Search Plan	14
<i>Details</i>	15
<i>Diversity</i>	16
<i>Advertisements</i>	17
<i>Qualifications</i>	19
<i>Selection Process</i>	19
<i>Committee</i>	20
<i>Documentation</i>	21
<i>Disposition Reasons</i>	23
<i>Search Outcome</i>	24
Search Plan Approvals	24
<i>Submit the Plan for Approvals</i>	24
<i>Monitor Approvals In Progress</i>	27
Publish the Approved Plan.....	28
<i>To Unpublish a Recruitment</i>	28
Editing the Recruitment.....	28
<i>Editing an Approved Plan</i>	28
<i>Editing a Published Recruitment</i>	28
<i>Special Editing</i>	29
<i>Editing Department Names: Cross-listing Recruitments</i>	30
<i>Editing Submission Dates: Changing the Recruitment Submission Type</i>	30
<i>Editing Documents Requirements (after applicants have applied)</i>	31
Part 2: Applicant Pools and Individual Applicants	33
Tools to Use with the Applicant List	33
Email the Applicants	36
Manually Add an Applicant	37
Basic Qualifications	38
Disposition Reasons	41
Statuses and Short-listing	42
<i>Updating Applicants' Statuses</i>	42
<i>Offer Proposals</i>	43
Manage the Applications.....	44
<i>Overview</i>	44
<i>Information</i>	45
<i>Documents & References</i>	46
<i>Manage the Applicant's Comments & Flags</i>	48
<i>Schedule a Visit or Seminar</i>	49
Part 3: Reporting	51
Applicant Pool and Shortlist Reports.....	51
<i>The Applicant Pool Report</i>	51
<i>The Shortlist Report</i>	51

<i>Creating the Reports</i>	51
Diversity Reports Approvals.....	53
<i>Updating Approvals</i>	55
Search Reports.....	55
<i>Search Report Components:</i>	55
Search Report Approvals.....	57
<i>Live-Updating of Search Reports</i>	57
<i>Existing Report (Saved Search Reports)</i>	58
The End of the Search.....	58
<i>Inactivate the Recruitment</i>	58
<i>To</i>	59
<i>Re-activate a Recruitment</i>	59
Appendix A	60
How Applicants Use Recruit.....	60
How References Use Recruit.....	63
How Approvers Use Recruit.....	64
How Committee Reviewers Use Recruit.....	65
<i>Applicant Pools</i>	66
Appendix B	69
Notifications Sent to Applicants.....	69
Notifications Sent to References.....	72
Notifications Sent to Approvers.....	74
Notifications Sent to Analysts.....	75
Supporting Recruit's End-Users.....	76
Appendix C	79
Special Tools for Recruit Administrators.....	79
<i>Proxy as User: Assume the role of any user in Recruit.</i>	80
<i>Manage Users:</i>	82
Administrative Reports.....	85
<i>Faculty Search Report:</i>	86
<i>Recruitment and Retention Report:</i>	87
<i>Applicant & Diversity Download Data</i>	87

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**.

Create New Recruitment Plan

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

The screenshot shows a web interface titled 'Create Recruitment: Basic'. On the left is a sidebar with a 'Basic Overview' section containing links for 'Information', 'Title Codes & Specialties', 'Contact & Notes', and 'Review'. To the right of the sidebar is a main content area. At the top of this area is a 'Next >' button. Below it, the text reads: 'Begin the recruitment by inputting data to create the Survey on Demographics.' This is followed by a bulleted list of four steps: 1. 'First, post information about the position - the title, posting dates, job information, URL, etc. Note: if this is a cross-listed position (multiple departments), contact us before getting started.' 2. 'Second, define the Specialties areas.' 3. 'Third, enter the contact information for yourself or another administrator.' 4. 'Fourth, confirm that all the information entered is correct.' At the bottom of the main content area, it says 'Get started by pressing the Next button.' and there is a '+' icon on the right.


4. Fill in the basic information about the recruitment:

The screenshot shows a recruitment form with several fields. The 'Recruitment name' field is filled with 'Professor Extraordinaire'. The 'Description' field contains a detailed paragraph about a search for an individual of international reputation. Below the description is a note: 'Displayed to applicants when viewing the details of this recruitment'. The 'Approved search area' field is filled with 'Modern/Contemporary Japanese Literature and Culture'. Below this is a note: 'Area for which the FTE was approved (e.g. Medieval Studies, etc.)'. The 'Department' dropdown menu is set to 'Department of Assumenda Libero'. The 'Academic year' dropdown menu is set to '2014 - 2015'. Below this is a note: 'Cannot be changed after recruitment has been created'. The 'Salary control #' field is filled with '02120'.

- **Recruitment name:** The recruitment name should match the ad.
- **Description:** This description appears to applicants on the corresponding apply page. Insert the full ad text. Include the Equal Opportunity/Affirmative Action Employer tag line (EEO). Include the *URL for Applicants* that the system will auto-assign. This description text will also be used when the recruitment is posted to HERC.org, InsideHigherEd.com, etc.

- **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.
- **Salary control#, salary range, and rank/step:** These optional fields will help with tracking.
- **Search Information**
 - Choose whether this position advertised broadly or specifically targeted.
 - 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.

Search Information

Search breadth:  *Click the Tool Tip for explanation*

Is this an open/general search or a targeted/specialized search?

Initial search allocation:

Is this position newly allocated or is it being re-listed from a previous academic year?

- **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.

Optional Information Link

Information URL:

Optional - check with your webmaster if you are unsure what you should put here

Open/Closed/Final Recruitments vs. Pool Recruitments

There are two distinct types of recruitments: Open/ Closed/Final and Initial Review Dates/Open Until Filled (IRD).

Application Submission Dates


Set up recruitment as:

Open/Close/Final Recruitments —Choose this for one-time searches that will complete when the vacant spot is successfully filled.

Open/Close/Final

* Open date: 
Applicants cannot apply until this date.

* Close date: 
Applicants cannot apply after this date.

* Final date: 
The recruitment will no longer be available to applicants after this date.

Key features of Open/Closed/Final:

- The Open date is when applicants can begin applying. Open dates remain editable by the analyst at any time. All recruitments must be open for at least 30 days.
- The Close date is when new applicants are no longer accepted. The Close date will be locked once the Search Plan is approved in order to help ensure that the close date remains true to the advertisement(s).
- The Final date is the deadline allowing existing applicants to modify their files. This date must be greater or equal to the Close date. Final dates remain editable by the analyst at any time.
- All completed applications are viewable to the search committee, regardless of Close or Final dates.

IRD/ Open Until Filled — Choose this for searches in which pools of applicants are gathered and evaluated separately at different times. Choose if you think a candidate might be chosen before the recruitment closes. Choose for “pool” recruitments when there will be multiple people hired. Recruit informs applicants that in order to receive full consideration by the committee, they must complete by a specific review date.

Initial Review Date/Open Until Filled

* Open date:

Applicants cannot apply until this date.

* Initial review date:

Applicants must complete their applications by this date to be considered.

* Final date:

The recruitment will no longer be available to applicants after this date.

Key features of Initial Review Dates/Open Until Filled:

- The first Initial Review Date marks the closing of the first pool of applicants. *Once the recruitment is approved, the IRD cannot be changed —this is designed to keep the advertisement and submission dates in sync.*
- Committee Reviewers will see the completed applications within a review period.
- The applicant can't modify applications that are completed before a review date once that date has passed.
- Committee Reviewers can choose not to view applicants from previous pools (previous review periods).
- After the current review date has passed the analyst may create additional review dates in order to capture a separate pool of applicants.
- Review dates can be marked private, and thus won't appear to applicants.
- The last date when applicants can apply is the Final date. If the analyst creates an additional review date that is after the Final date, the Final date will automatically be moved forward to accommodate it.
- Applicants may apply before the Final date, even if there is no upcoming review date. In this case, they will be informed that their application may or may not be considered.

Title Codes and Specialties

Title Codes: Academic Title Codes map directly to salary scales and the codes that are input into this field must reflect the wording in all advertisements for the recruitment.

After the Search Plan is approved, the title codes are no longer editable. This helps to ensure the scale is not retroactively changed to suit a particular candidate. To cue you, lock icons appear in the field along with a tool tip when the icon is rolled over. In the case of clerical error only, a Recruit Administrator may override the lock.


Type a title code in the box. Or, type part of the name, for example, “Prof.” 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.

Title codes:

✕ 3618: ASSOC LIBRARIAN-TEMP STATUS (Non-senate)

✕ 3622: ASST LIBRARIAN-TEMP STATUS (Non-senate)

Start typing a title code to add more title codes, or click the 'x' to remove a title code

 Title codes will be locked after the search plan is approved.

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

Specialties: All applicant pools must be compared against national available averages. Specialties are used when generating the applicant pool reports, a core feature of Recruit.

Start typing a specialty into the box. The system will provide a menu of specialties to select. You may select up to 5 specialties. Click the ‘x’ to remove a specialty.

Specialties:

✕ Librarian: Librarian: All

Start typing a specialty, or click the 'x' to remove a specialty

If you can't find a specialty needed: Specialties with smaller availability numbers are purposely folded into larger ones so if you can't find what you're looking for, choose a more general category.

FYI: Data sources vary.

- Specialties beginning with “Campus” will use data derived from the NSF Survey of Earned Doctorates (NORC).
- Specialties beginning with “Health Sciences” will use data derived from the Association of American Medical Colleges (AAMC).
- Specialties beginning with “Law” will use data derived from the Association of American Law Schools (AALS).

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

Recruitment Contact Email

Analysts, administrators, and the online search committee will use this address.

Contact Name:

Contact Email:

Department Mailing Address

The mailing address that applicants and references may use.

Address:

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

[< Back](#)
[Save & Done](#)


Information [Edit](#)

Recruitment name: My Test Position
Department: International Programs-University Programs
Academic year: 2013 - 2014
Recruitment dates: July 7th, 2013 – January 7th, 2014 (January 21st, 2014)
Search breadth: Open search
Initial search allocation: Newly Allocated
Salary control number: 1234
Job information URL: https://staffing2.hr.uci.edu/CSS_External/CSSPage_BrowseJobs.ASP?r44b=no

Title Codes & Specialties [Edit](#)

Basic Recruitment Completed

The basic particulars are done but you will need to configure it further. If you're ready to input the required document and reference information, choose **Yes, Configure for Online Applicant Management** in the confirmation box. Or you can stop here and configure this at a later date.


Recruitment JPF00158 Successfully Created!


This Recruitment is eligible for **Online Applicant Management**. If you're ready to input the required document and reference information, choose "Configure for Online Applicant Management" below. Otherwise, to return to the Recruitment list, choose "Done for Now".

You can configure this position at a later date by using the "Configure for Online Applicant Management" link on the Recruitment list.

[No, Done for Now](#)
[Yes, Configure for Online Applicant Management](#)

Configure the Recruitment for Online Applications

It's time to define the required and optional documents and references.


Note: After an applicant has applied to this position, you cannot change reference requirements or required documents, but you may add optional documents if you need to collect additional data from applicants.

Documents

[Add](#)
[Reorder](#)

Document	Optional Comment or Description	Type	Actions
Curriculum Vitae	Your most recently updated C.V.	Required	Edit Delete
Cover Letter		Required	Edit Delete
Statement of Research		Optional	Edit Delete
Statement of Teaching		Optional	Edit Delete
Statement addressing how past and/or potential contributions to diversity will advance UCI's Commitment to Inclusive			

References

Type: * ☐ None - this recruitment does not require references
☐ Only contact information - only ask for reference email and address - letters will be requested by the department as needed
☒ Letters of recommendation - allow references to login and provide their letters when requested by the applicant

Number: * to

*Show references to:

Restrict reference viewing to certain members of the search committee

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).

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: After the first applicant has applied, changing the requirements is extremely restricted. It will only be possible to add optional documents. See the section, [Editing a Recruitment/Editing Document Requirements After Applicants Have Applied](#).

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.

- 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.

Help Email Address for Applicants

Email:

Questions from applicants go to this address

"From" Email Address

- This name and email address is used when UC Irvine AP Recruit sends an email to:
 - References, thanking them for their submitted letter
 - Applicants, when their application is manually created and/or activated
 - Applicants, to ask them to complete the diversity survey when the applicant is manually finalized

From (Name):

From (Email):

Reference "Thank You" Email

Subject:

Body:

Hello,

Thank you for submitting a letter of recommendation. Your letter is now available on-line for viewing by the faculty search committee. Please read the University of California's confidentiality policy.

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.

Documents & References [Edit](#)

The documentation and reference requirements cannot be changed once your first applicant has applied

of documents: 2 Required, 4 Optional

Type of references: Letters of recommendation

of references: 1 to 3

Reference viewing rights: All reviewers

Email Settings [Edit](#)

Applicant help email: icastane@uci.edu

Reference "Thank You" To: Email address for the reference
email: From: [Irene Castane](#) (icastane@uci.edu)
Subject: Thank you for your contribution for [Applicant name] for Calit2 Kookoo's at UCI

Hello,

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

Success

Your plan is now ready to be reviewed or published. To manage this plan, you can:

- [Edit Basic Recruitment Information](#) to update the position name and dates
- [Update Online Application Requirements](#) to change the documentation settings for your applicant pool

Find and View Recruitments

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



Viewing Rights to the Recruitments

- Department analysts see all recruitments created under their department name.
- School analysts see all recruitments created in every department within their school.
- Committee Chairs and Editors see all recruitments they have been given access to.
- Committee Reviewers see all *published* recruitments they have been given access to.

A new recruitment remains in a **Draft** state until it is approved & published. Draft recruitments are not visible to applicants or committee Reviewers.

JP00594	Associate Professor-Cardiovascular	Draft
	Search Info	

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 and pressing return.

Recruitment Page Filters

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

Submission Dates

☒ Pending
 ☒ Open
 ☒ Closed but not Final
 ☒ Final and Closed

Dates

☒ Open Date
 ☒ Close Date
 ☒ Final Date

Academic Year

☒ 2013 - 2014
 ☒ 2012 - 2013

Recruitment Type

☒ Online
 ☒ Basic

Hiring Type

☒ Tenured / SOE
 ☒ Other Academic Positions

Other

☐ Has Applicants
 ☐ Show Inactive

Filter

Reset

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.

Working with the Search Plan

Find the recruitment and click either the “Search Info” link or the JP# number.

Submission Dates	JP #	Name	Department	Submission Dates	Actions
<input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Closed but not Final <input checked="" type="checkbox"/> Final and Closed	JP#00594	Associate Professor-Cardiovascular	Department DEF	Open	Make Inactive
Dates		Search Info			

Details

The Details section summarizes the recruitment. Committee chairs, editors, reviewers, and approvers can view this section but only analysts can edit it.

Lecturer
JPF00646 • Department booya / A School of Aliquid BC • Description

Search Info Reports Applicants (0)

Details

OPEN Applicants can now apply. [Review current applicants.](#)

👤 Applicants can apply to the recruitment immediately, as it opened on Jun 9, 2014
🔗 <https://recruit.ap.ucl.edu:31002/apply/JPF00646>

📄 Download Search Plan
👤 Approved (1/1) on Jun 11, 2014
👤 Published on Jun 11, 2014 by Kim Gerrard • **Unpublish**

General Information [Edit](#)

Job #	JPF00646
Department	Department booya / A School of Aliquid BC
Title code	1100 - PROF-AY
Type	Senate / Tenured / SOE
Salary control #	12345
Academic year	2014/15
Breadth	Open search
Initial allocation	Newly Allocated

Contact Information [Edit](#)

Mailing address	5072 Considine Turnpike Emardview, Delaware 88467
Faculty/Staff contact	Ima A. Lyst
Public contact	Bea Winner
Help contact	bawinn@uc.edu
More info	http://www.ourdept/jobs.uc.edu

Description [Edit](#)

Our department is conducting a search for an individual of international reputation working at the forefront of interdisciplinary awesomeness with a proven record of engagement and collaboration with other members of this discipline.

Dates [Edit](#)

Type	Open/Close/Final
Open date	6/9/2014 (Monday)
Close date	6/9/2015 (Tuesday)
Recruitment period	365 days
Final date	6/9/2015 (Tuesday) 🕒

Document Requirements [FIRST APPLICANT](#) [Edit](#)

Curriculum Vitae **Required**
Your most recently updated C.V.

Cover Letter
Statement of Research
Statement of Teaching
Misc / Additional

Reference Requirements [FIRST APPLICANT](#) [Edit](#)

Type	Letters of recommendation
# required	1
# optional	4
Visible to	All reviewers

Internal Analyst Notes [Edit](#)

Similar to prior search in 2013.

URL for Applicants: A unique URL for the recruitment is displayed in the status box at the top of the screen. It's used for job ads, postings, electronic mailings, and links on other websites. Return to the **Description** field and place this link in the text.

The Status of the Plan: Dynamically changing status boxes appear at the top of the Details screen that help the analyst know what they need to do next. The prompt guides the analyst through the search plan approval process and all the way to the end of the search. The following show various states for a recruitment.

DRAFT When this recruitment plan is ready, [submit it for approval.](#)

PENDING APPROVAL Recruitment plan is under review. [View approval request \(0/2\)](#)

READY TO PUBLISH All approvers have approved. [Publish now](#)

PENDING Recruitment has not yet opened.

OPEN Applicants can now apply. [Review current applicants.](#)

CLOSED Applicants are making final edits. [Review current applicants.](#)

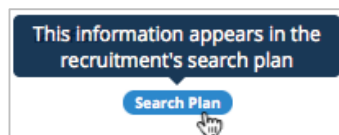
FINAL Applicants can no longer make changes. [Review applicants.](#)

INACTIVE This recruitment is inactive. [Make active](#)

Diversity

Committee chairs, editors, reviewers, and approvers can view this section and analysts can edit the section. Chairs and editors can also edit the Equity Advisor Role field.

Note: Look for icons that serve as indicators telling you whether the information is part of the **Search Plan** or **Search Report**. Roll over the icon with your mouse to reveal the helper text as shown here:



Details
Diversity
Advertisements
Qualifications
Selection Process
Committee
Documentation
Disposition Reasons

Specialties and Benchmark Data Search Plan Edit

The diversity of candidates available in each specialty identified.

Specialty	Male	Female	African American	Hispanic	Asian	Native American	Minority Total	White
Campus: Human development and family studies	24.9%	75.1%	6.6%	3.4%	3.9%	0.5%	16.0%	84.0%
Campus: Art education	23.6%	76.4%	6.7%	3.1%	5.7%	0.7%	18.8%	81.2%

Pool Diversity

The diversity of the pool as the search progresses. Watch for any large shifts from one row to the next.

Pool	Male	Female	African American	Hispanic	Asian	Native American	Minority Total	White
All Responses	48.0%	52.0%	24.4%	19.9%	22.2%	18.2%	84.7%	15.3%
All Applicants see candidates	48.4%	51.6%	24.6%	20.0%	22.3%	18.3%	85.1%	14.9%
Shortlist see candidates	48.3%	51.7%	24.7%	20.1%	22.4%	17.8%	85.1%	14.9%

Affirmative Action Goal Add

[Learn more about your unit's AA goals](#)

Equity Advisors Search Plan Edit

The Diversity section includes:

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.

Pool Diversity: This table enables search committees charged with ensuring a diverse applicant pool to better perform that task.

- 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 gender and ethnicity via their "See candidates" link.

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.

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.

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. Committee chairs, editors, reviewers, and approvers can view this section and analysts can edit the section. Chairs and editors can also edit the Search & Recruitment Effort fields and upload ad documents.

Details
Diversity
Advertisements
Qualifications
Selection Process
Committee
Documentation
Disposition Reasons

Planned Search & Recruitment Efforts
Search Plan
Edit

This advertisement will be placed in the following websites; UCI Employment Opportunities, American Political Science Association e Jobs, International Studies Association.

Actual Search & Recruitment Efforts
Search Report
Edit

Besides making calls and emails to encourage recruit potential underrepresented candidates to apply to the International Studies Lecturer position, we considered candidates who may be currently under-placed and excelling at less well-ranked institutions.

Ad Documents
Search Plan
Upload

File	Comment
International Studies Association ad Edit Delete	Uploaded on Apr 11, 2014 10:03am by AP Department Analyst
American Political Science Association Ad Edit Delete	(short copy for web ad) Last modified Apr 11, 2014 10:04am by AP Department Analyst

HERC Category
Search Plan
Edit

International Affairs/Studies

Ad Sources
Search Plan
Add

- UCI Employment Opportunities [🔗](#) [🗑️](#)
- Americal Political Science Association eJobs [🔗](#) [🗑️](#)
- International Studies Association [🔗](#) [🗑️](#)

Ad Evidences
Search Report
Upload

File	Ad Source	Comment
Ad ran Mar/Apr Edit Delete	Chronicle of Higher Education	Uploaded on Apr 11, 2014 9:31am by AP Department Analyst

Search Sources ?

#	Source
0	HERC - Higher Education Recruitment Consortium
0	Inside Higher Education Website

The Advertisement section includes:

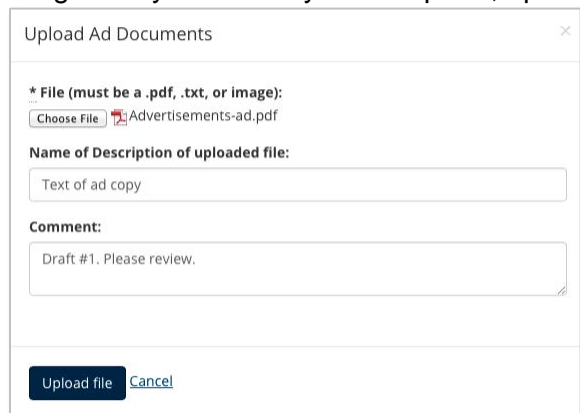
Planned Search and Recruitment Efforts: This section is to describe all *planned* efforts to reach a broad and inclusive applicant pool.

Note: Information is required to submit the Search Plan and the field becomes locked after approvals. Locking helps ensure that the efforts will not change based on what happens during a search. To cue you, lock icons appear in the field along with a tool tip when the icon is rolled over. For minor editing only, the lock may be overridden by a Recruit Administrator.

Actual Search & Recruitment Efforts: Return to this field later to enumerate all efforts taken to reach a broad and inclusive applicant pool. This information is required to generate all of the recruitment's reports.

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**.



The 'Upload Ad Documents' dialog box contains the following fields and controls:

- * File (must be a .pdf, .txt, or image):** A file selection button labeled 'Choose File' followed by the text 'Advertisements-ad.pdf'.
- Name of Description of uploaded file:** A text input field containing 'Text of ad copy'.
- Comment:** A text area containing 'Draft #1. Please review.'
- At the bottom, there are two buttons: 'Upload file' (dark blue) and 'Cancel' (light blue).

HERC Categories: Select a HERC category to ensure the best visibility for your job posting in HERC (Higher Education Recruitment Consortium).

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



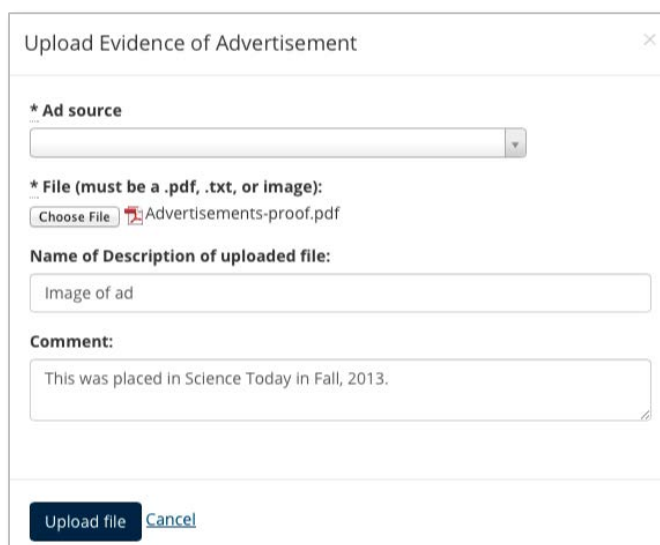
The 'Ad source' dialog box contains the following fields and controls:

- Name:** A text input field containing 'Journal of English Literature'.
- At the bottom right, there are two buttons: 'Cancel' (light blue) and 'Add ad source' (dark blue).

Ad Evidence: For OFCCP (Federal audits), copies of actual ads will be needed. This information should be included in the recruitment's *Search Report*.

Return to this area when you can provide proof that an advertisement was placed.

Ad sources must be entered in order to upload evidence. 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**.



The 'Upload Evidence of Advertisement' dialog box contains the following fields and controls:

- * Ad source:** A drop-down menu.
- * File (must be a .pdf, .txt, or image):** A file selection button labeled 'Choose File' followed by the text 'Advertisements-proof.pdf'.
- Name of Description of uploaded file:** A text input field containing 'Image of ad'.
- Comment:** A text area containing 'This was placed in Science Today in Fall, 2013.'
- At the bottom, there are two buttons: 'Upload file' (dark blue) and 'Cancel' (light blue).

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 to document the qualifications required of an applicant and should be reiterated in all advertisements for the position. Approvers and committee reviewers can view this section. Analysts, chairs, and editors may add/edit it.

Note: These fields will no longer be editable after the Search Plan has been approved, effectively restricting the ability to retroactively change the recruitment's goals to suit a particular candidate. Lock icons appear to cue you and a rollover tool tip explains the lock. For minor editing only, the lock may be overridden by a Recruit Administrator.

Selection Process

This section is for analysts, chairs, or editors to document the job related criteria and the committee's plan for the selection of candidates. Approvers and reviewers have read (not write) access.

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:** Document how the search committee will evaluate the applicants and select the shortlist and finalist (Phone interviews, in-person interviews, etc.)

Committee

This section is where analysts assign committee roles on a recruitment-by-recruitment basis so when the members log into Recruit, they will have the proper access to recruitments and applicants. Any committee member and approver named in the search *plan* can view this section but only analysts may add/edit members.

Committee permissions:

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.

- **Core Committee Chairs** will see all applicants, regardless of whether the applications are complete or not and like analysts, Chairs have complete management rights over the applicant’s files. Chairs also are able to make changes to many parts of the various fields in the recruitment’s setup sections.
- **Core Faculty Editors** have the same access rights as Committee Chairs and are able to assist the analyst in managing the applications.
- **Core Reviewers** have read-only rights to *only* completed applications. However, Admins can use the Edit button to grant Reviewers disposition permissions, allowing reviewers to disposition completed applications.

Add’l Chairs, Add’l Editors, Add’l Reviewers are technically not part of the committee, but may be called in to help review the applications. They have the same access rights as their counterparts.

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.

Committee	
<div> Add members Manage existing members </div>	
Core Committee <div> Search Plan Add </div>	
Committee Chair	Charlie Committee Chair <ap-no-reply@recruit.ap.uci.edu> Change role Remove Proxy
Faculty Editor	Edna Committee Editor <ap-no-reply@recruit.ap.uci.edu> Change role Remove Proxy
Reviewers	Andy Committee Reviewer <ap-no-reply@recruit.ap.uci.edu> Change role Remove Proxy Betty Committee Reviewer <ap-no-reply@recruit.ap.uci.edu> Change role Remove Proxy
Additional Access <div> Search Plan Add </div>	
Add'l Chairs	None Add one now
Add'l (Staff) Editor	Elissa Huel <jared_beer@huels.name> Change role Remove Proxy
Add'l Reviewers	None Add one now

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.

Add Members to Search Committee

To add people to the search committee:

- Add any employee by selecting their name, email address, or UCInetID.
- Add entire department (Full, Associate, and Assistant Professors) by selecting school and department.
- Add individual faculty by selecting school, department, and person.
- Students must be employees to be added to the search committee.

Search for a person:

- or -

Search faculty by department:

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

Search for a person:

- or -

Search faculty by department:

Name	Title	Department	Role
Department: Arts-Dance			Only Full, Associate, and Assistant Professors
TREVOR, MARK D.	Full Professor	Arts-Dance	<input type="text" value="Additional Reviewer"/>
TREVOR, MARK D.	Associate Professor	Arts-Dance	<input type="text" value="Editor (Faculty)"/>
TREVOR, MARK D.	Associate Professor	Arts-Dance	<input type="text" value="No access"/>
TREVOR, MARK D.	Associate Professor	Arts-Dance	<input type="text" value="No access"/>

Listed on AP-80a

☐ Chair

☐ Editor (Faculty)

☐ Reviewer

☐ Additional Members

☐ Additional Chair

☐ Additional Editor (Staff)

☒ Additional Reviewer

☐ No access

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

[Manage existing members](#)

Documentation

This section is for analysts, chairs, or editors to archive and retrieve various materials associated with the recruitment. Accepted file types: Files must be PDF, TXT, or images.

[Details](#)
[Diversity](#)
[Advertisements](#)
[Qualifications](#)
[Selection Process](#)
[Committee](#)
[Documentation](#)
[Disposition Reasons](#)

Search Plan Documents

File	Comment
Job description Edit Delete	Uploaded on Apr 11, 2014 10:09am by AP Department Analyst

Letters and Memos

File	Applicant	Comment
Letter from Dean Block Edit Delete	-	Important letter regarding the search Last modified Apr 11, 2014 10:08am by AP Department Analyst

Interview Materials

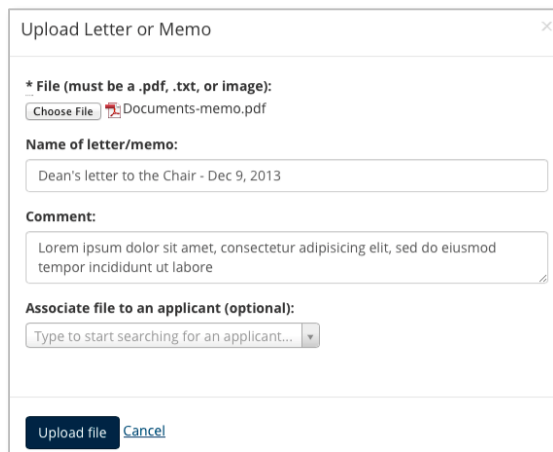
File	Applicant	Comment
General Questions Edit Delete	-	Uploaded on Apr 11, 2014 10:08am by AP Department Analyst

The Documentation section includes:

Search Plan Documents: Store any miscellaneous documents associated with the search that needs to be kept for the electronic record.

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.

1. Click **Upload** and choose the file from your computer.
2. Enter the name of the letter/memo.
3. Add a comment if needed.
4. Optionally associate the letter/memo with an applicant.
5. Click **Upload File**.

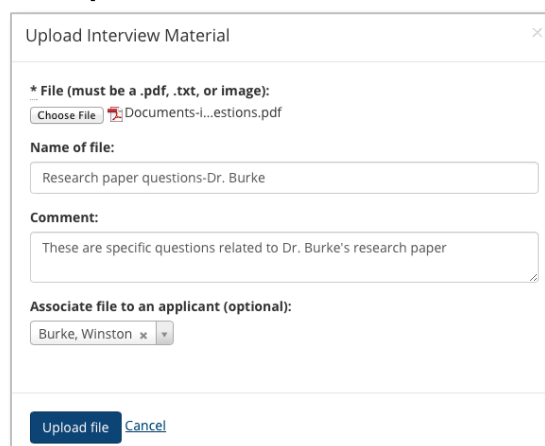


The screenshot shows a dialog box titled "Upload Letter or Memo". It contains the following fields and controls:

- A file selection section with the text "* File (must be a .pdf, .txt, or image):" and a "Choose File" button. A file named "Documents-memo.pdf" is selected.
- A text input field for "Name of letter/memo:" containing the text "Dean's letter to the Chair - Dec 9, 2013".
- A text area for "Comment:" containing the placeholder text "Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore".
- A dropdown menu for "Associate file to an applicant (optional):" with the placeholder text "Type to start searching for an applicant...".
- At the bottom, there are two buttons: "Upload file" and "Cancel".

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.

1. Click **Upload** and choose the file from your computer.
2. Give the item a name.
3. Add a comment if needed.
4. Optionally associate the item with an applicant's name using the drop-down selector.
5. Click **Upload File**.



The screenshot shows a dialog box titled "Upload Interview Material". It contains the following fields and controls:

- A file selection section with the text "* File (must be a .pdf, .txt, or image):" and a "Choose File" button. A file named "Documents-i...estions.pdf" is selected.
- A text input field for "Name of file:" containing the text "Research paper questions-Dr. Burke".
- A text area for "Comment:" containing the text "These are specific questions related to Dr. Burke's research paper".
- A dropdown menu for "Associate file to an applicant (optional):" with the text "Burke, Winston" and a close button (x).
- At the bottom, there are two buttons: "Upload file" and "Cancel".

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 committee member and approver named in the search *plan* have read (not write) access to this section.

Disposition Reasons [Search Plan](#)

For applicants marked as **meets basic qualifications**

Custom [Add custom disposition reasons](#)

System-wide

- Alternate for position
- Not considered - application submitted after initial review date and position filled by candidate from initial review date pool
- Not considered - the recruitment/position was cancelled prior to applicant review (please specify)
- Specialization or area of expertise for position or department needs shows some deficiencies
- Duplicates or significantly overlaps existing area of strength in department/school/college
- Lacks sufficient research achievement/potential
- Lacks sufficient depth/breadth of research/creative excellence or impact
- Publication record shows some deficiencies
- Lacks sufficient teaching achievement/potential
- Job talk showed some deficiencies
- Lacks sufficient contributions to diversity/cultural competence
- Lacks sufficient potential for successful attraction, advising, and mentoring of students/trainees/postdocs
- References were weak
- Lacks sufficient leadership experience for position
- Lacks sufficient clinical experience
- Lacks sufficient communications skills
- Other, please specify
- Interview showed some deficiencies
- Overall record not as strong as other candidates

For applicants marked as **does not meet basic qualifications**

Custom [Add custom disposition reasons](#)

System-wide

- Did not possess basic degree requirements stated in advertisement
- Degree was not in the advertised field(s) if specific field(s) were required
- Application was incomplete, materials submitted were not the required materials
- Did not meet stated basic teaching requirements
- Did not meet stated basic research requirements
- Did not meet stated basic service requirements
- Did not meet stated basic years of experience required
- Did not possess stated credentials (e.g., board eligibility/board certification)
- Did not meet stated basic clinical requirements

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**.

[Add custom disposition reasons](#)

2. The custom reasons dialog box opens. Click “Add custom reason.”

Manage custom reasons

- Up to 5 custom reasons can be defined for each recruitment
- Reasons **removed** from this list will also be removed from any applicants with that reason
- Reasons **edited** here will also be changed on any applicants with that reason

Reason [Add](#) [Cancel](#)

[Add custom reason](#)

[Save Changes](#) [Cancel](#)

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.”

[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.”

[Manage suppressed reasons](#)

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

Search Outcome

This section allows analysts to specify the initial search outcome — whether the search was successful at identifying any candidates— so that information can be included as part of the search report. Any committee member and approvers have read (not write) access to this section.

1. Click “Select the initial outcome of this search.”

Select the initial outcome of this search

2. Make a selection. If “Proposed candidate” is selected, Recruit will alert you if no candidates have been updated to a proposed status.

Initial Search Outcome

What is the initial outcome of this search? Are any applicants identified as proposed candidates?

☒ **Proposed candidate:** One or more applicants will be recommended for appointment
☐ **Failed - no candidate:** The search did not result in any proposed candidates
☐ **Canceled:** The entire search is canceled (e.g., due to lack of funding)

[Save changes](#)
[Cancel](#)

Alert: There are currently no applicants with a status of "Proposed Candidate". Before creating the search report, be sure and update all applicant statuses to show which applicants are proposed candidates. [Manage applicants now](#)

Search Plan Approvals

After all necessary information based on the department's search business practices is provided, the analyst submits the search plan for approval(s).

Submit the Plan for Approvals

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

DRAFT When this recruitment plan is ready, [submit it for approval](#).

2. The system *should* assign approval workflows containing lists of steps. If you think this is not the correct workflow, stop here and report this using the contact Support link.

3. Otherwise, click **Yes, submit for approval**.

Are you sure you want to submit this plan for approval?

A new approval will be created for this plan.

Using workflow "**Non-Senate Plans and Reports**", which includes the following steps:

1. Department Chair
2. Dean
3. Diversity Office

You will be able to add steps after creation.

If this is not the correct workflow, please contact [Support](#).

Yes, submit for approval Cancel

4. The Plan **Approval Request** screen opens:

Approval Request

Approval requested for a **Plan for Colossus Lecturer of Able (JPF00535)**

[Download plan](#) [Leave a comment](#) [Notify Approvers](#)

✓ Approvers - 0/3 required have approved

Step	Person
Department Chair	Required Specify person
Dean	Required Specify person
Diversity Office	Gwendolyn Kuhns Black <gwen.black@uci.edu> Add alternate approver <small>recruit Proxy</small>

[Add step](#) [Reorder steps](#)

Comments - 0

Done Submitted for approval 7/31/2014 by Kim Gerrard

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."

[Specify person](#)

2. Enter the person's email address or UCInetID 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 an 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."

[Add alternate approver](#)

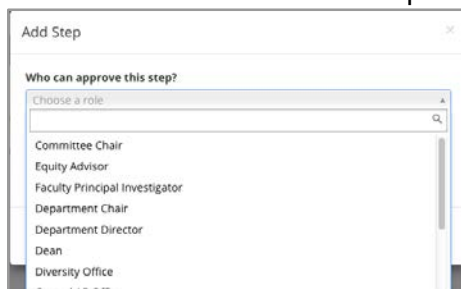
2. Enter the person's email address or UCInetID into the box.
3. Click **Add**.

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.”

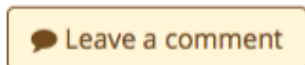


2. Place your cursor over the icons and drag the step into place.
3. Click “Save changes.”

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



Comments. Attach a comment, question, etc. to be logged for the electronic record.

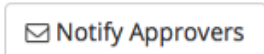


Automatic Approver Emails. Automatic email notifications are sent to approvers and cc'd to analysts submitting the plan. The notifications include a direct link to the approval screen where approvers may download the plan, comment, and approve. See Appendix A, “How Approvers Use Recruit” and Appendix 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.*

Notify Approvers. Approvers are automatically notified when it is their turn to approve but you may prod the approver who's taking too long, warn the pending approvers about what's coming their way, or highlight a change that previous approvers might need to know about.

1. Click the “Notify Approvers” button.



2. Type the message and choose whom to send it to.

X

Notify Approvers

Your message will be sent via email to the specified approvers, and saved as a comment. Remember that approvers are automatically notified when it is their turn to approve.

Message

Email text (a link is included automatically)

Send to

☐ All approvers those who have approved, plus those people who have not yet approved.

☐ Previous approvers those who have already approved.

☐ Current approver those who are next in line to approve.

☐ Pending approvers those who have not yet approved, including the current approver.

Send Email [Cancel](#)

3. Click “Send Email.”

Monitor Approvals In Progress

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

Home Recruitments **Approvals** Applications Help

Hello, AP Department Analyst 3 - Remove Proxy | Logout

Home Approvals

New approvals dashboard for all analysts.

Change Columns (option to change what you see here)

Q Name, #, Department, etc Search

All Requests

Type

☒ Search Plan

☒ Applicant Pool Report

☒ Shortlist Report

☒ Search Report

Status

☒ Pending

☒ Approved

Filter Reset

Type	Name	Approvers	Requested On	Last Approved On	Last Approved
Search Plan	Testing a Basic - Row 14 (JPF00547) Approval details (1/1) Search Info	✓ Chair	Jan 15, 2014 3:08pm Marian Nedelchev	Jan 15, 2014 3:08pm Marian Nedelchev	6 months ago
Search Plan	Basic Recruitment - nothing fancy - Row 11 (JPF00514) Approval details (1/1) Search Info	✓ Chair	Jan 15, 2014 4:32pm Marian Nedelchev	Jan 15, 2014 4:43pm Marian Nedelchev	6 months ago
Applicant Pool Report	Switcheroo Recruitment Two (JPF00568) Approval details (1/2) Search Info	✓ Chair → Dean	Jan 17, 2014 11:20am Kim Gerrard	Mar 27, 2014 2:27pm Charlie Committee Chair	3 months ago
Search Plan	OCF Recruitment Test Emails (JPF00588) Approval details (1/1) Search Info	✓ Chair	Jan 17, 2014 4:37pm Marian Nedelchev	Jan 17, 2014 4:37pm Marian Nedelchev	6 months ago
Search Plan	Assistant Professor of Psychology (JPF00591)	✓ Faculty Advisor	Jan 24, 2014	Jan 24, 2014	5 months ago

(Get to the details here)

(see who's approved and who hasn't in this column)

Publish the Approved Plan

Publish a recruitment to make it available to applicants to apply and to the search committee to review.

1. When a plan is completely approved, a **Publish** link appears in the Details screen status box.

READY TO PUBLISH All approvers have approved. [Publish now](#)

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

Really publish? ×

This will convert this plan into a recruitment.

- The search committee will see the recruitment immediately
- Applicants can apply to the recruitment immediately, as it opened on Jul 28, 2014

Cancel Yes, publish

Don't forget to publish. Unpublished recruitments mean that the recruitment will languish and you won't receive any applicants!

To Unpublish a Recruitment

It's rare, but analysts can pull a recruitment back to a draft state, effectively removing it from the apply page. Unpublishing does not remove any prior approvals and isn't available after the first applicant applies. Click the Unpublish button, located on the far right side of the Details screen.

Unpublish

Editing the Recruitment

Editing an Approved Plan

The flexibility of Recruit allows editing of 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.

If you wish to change the ad after approvals, please contact OEOD.

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. 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.

Use the inline edit buttons on the **Details** page to edit information related to the recruitment.

General Information Edit	Edit the position name, department, title codes, salary control # proposed salary, etc.
Contact Information Edit	Customize how various parties can inquire about the recruitment.
Description Edit	Update this public-facing, important field.
Dates Edit	Edit the open, close, final dates, add review dates, or change submission date type.
Document Requirements FIRST APPLICANT Edit	Requirements are fully editable until applicants appear in system.
Reference Requirements FIRST APPLICANT Edit	Requirements are fully editable until applicants appear in system.
Internal Analyst Notes Edit	Add and edit any special notes.

Special Editing

Additional Review Dates

Your initial review date has passed and you need to add another review date. On the Details page, click the inline **Edit** button beside **Dates**.

Dates [Edit](#)

Click the link, “Add new review date.” If this link doesn’t show, then the previous review date has not passed and you will have to wait to specify additional review dates.

Edit Dates

Open date:

October 13th, 2014

Initial review date:

November 30th, 2014

Public – shown to applicants Private – hidden from applicants

➤ Add new review date

Final date:

Dec 31, 2015

The recruitment will no longer be available to applicants after this date

Type in a new review date in the box provided. By default, the new date is “Public”, meaning you want all applicants to be aware of the review date when they apply.

Sample Scenario: In the example shown to the right, the new review date (April 17, 2015) acts as the last modification date for a new group of applicants and Recruit will send reminders to them to finish up a few days prior. If they complete their application after their review date, their application dashboard will display the fact that they may not be reviewed or considered for the position.

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 supports this, resulting 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).
- the Offer Proposal form displays each unit for the analyst to indicate the allotment of salaried time for selected candidates. 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. Click 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 Submission Type

Before any applicants apply, you may switch the recruitment type between OCF and IRD.

1. On the Details page, click the inline Edit button beside Dates.

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

[> Change recruitment type](#)

- You'll be required to enter a Close date when changing from an IRD to an OCF.
- You'll be required to enter an Initial Review Date when changing from an OCF to an IRD.
- Once the dates are set, click the button "Change to Open/Close/Final" or vice versa to make the switch.
- The Details screen will note the new type in the Dates section - either Open Closed Final or Review Dates.
- The changed submission dates will display correctly to applicants on the Apply page and on application dashboards.
- 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 submission type could 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 Documents Requirements (after applicants have applied)

After your first applicant has applied, you can **only add optional** documents. Adding an optional document should not be done lightly, as it affects all current applicants, complete or incomplete. It is highly recommended that you use Recruit's built-in email notification to alert existing applicants about the change.


- Return to the **Details** section of the recruitment.
- Click the inline Edit button beside **Document Requirements**. If a lock icon appears next to "First Applicant", this indicates that there are already applicants. Editing requirements will be restricted to adding only optional documents.

Document Requirements  FIRST APPLICANT [Edit](#)

- Scroll to the bottom of the edit form and click "Add another optional document."

[+ Add another optional document](#)

- An alert reminds you that there are applicants. Name the new, optional document and expand the link to add a description.

 The recruitment already has applicants, so new files must be optional. Applicants will have until 1/5/2017 to provide new documents.

New Thing

Required
Optional

Notify applicants
Do not notify

[Add description...](#)
[Add notification message...](#)

[Remove](#)
[View notification example](#)

- Click "Add notification message." To see a sample of the notification, visit the Help Docs by clicking the link, "View notification example."
- Compose your message in the box provided and click the button, "Notify applicants."

7. Click "Save Changes."

A dark blue rectangular button with the text "Save changes" in white, sans-serif font.

8. The newly added optional document cannot be edited/changed after being added.
9. Verify the new, optional document appears in the list of requirements on the **Details** page.

If a notification email was sent, the applicant's log will document this with a timestamp: "Email sent: UC Recruit Optional Document Requested."

Part 2: Applicant Pools and Individual Applicants

The Search Plan has been approved, published and applicants have begun applying. Locate the applicant pool from the **Recruitments** page.



Locate the link beneath the name of the recruitment.



Note: For analysts, editors and chairs the number in parenthesis is the total number of people who have *applied*. For reviewers, the number represents *completed* applications.

Tools to Use with the Applicant List

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

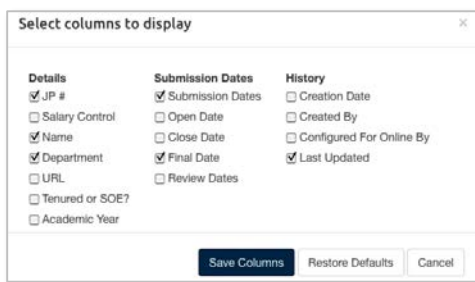
Search Box. Zero in on the applicant you are looking for by typing in a search word and pressing return.

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

1. Click the button at the top of the list of names, “Change Columns”.



2. Check the boxes to determine what to display on your screen. Then **Save Columns**.



Download Applicant Data: This is a useful tool 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.

1. Click the button, **Download This Data** for all column data displayed.
2. Or for a simpler list, click **Download Names & Addresses**.
3. 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 **Hidden** filter.

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).

Filtering the list of applicants.

Mark as Read: This is a way for you to check off 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 in their row.
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.

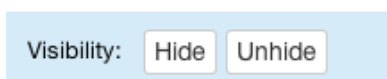


4. If an application is updated since you marked it as read, an alert icon will cue you.



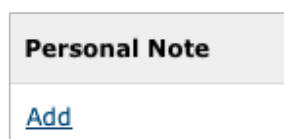
Hide / Unhide an applicant: Only Analysts, Chairs and Editors have this tool. Recruit never deletes an application but “Hide” comes close. This may be useful if an applicant has applied to the wrong position or applied twice. Use this tool with caution! When you hide an application, it’s hidden from everyone else too.

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.



Add Personal Note: This is a way to jot yourself a note about an applicant. The feature is available to all users who can view the applicants. Notes should be limited to those that are job-related, as they become part of the electronic record.

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



2. Type a note up to 255 characters.
3. Click "Save".
4. To view your longer notes, click on the ellipses.
5. Click the *Edit* link to edit your note or remove it.

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 quick visual of what requisites are done and what is still needed in order to be a complete application. When a requisite is fulfilled, the corresponding dots fill in solidly.



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.



Email the Applicants

Use a template to compose a single message to send to one or more applicants. Only Analysts, Chairs and Editors have this tool.

1. First, put a check in the empty box beside all of the name(s) of applicants you wish to contact. A check in the top header box will select all names.
2. Then click "Send Bulk Email" in the row at the top of the list of names.

Send Bulk Email

3. A template opens:

4. The "From" line defaults to the logged-in user (the Analyst, Chair or Editor). If this line is edited, then the actual message received by the applicant will appear to come from that person.
5. To personalize the template, you may insert variables into the subject line or message body, for example: {ApplicantName}, {Username}, {ApplicantCompletedDate}, {RecruitmentName}, etc.

6. Click "Preview Email".
Click "Send Email" when ready. This action is immediately noted in the applicant's log. A second log item notes when the message leaves the queue and is handed off to the campus email server.
7. In the rare case when an applicant's email address is wrong, this will **not** be noted in the applicant's log. The campus email server should be configured to deliver "failed" messages to the sender (analyst, chair, or editor) so they can correct the email address and attempt to contact the applicant once more.

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**.

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**.

Notice: Applicant cannot access this application until it is activated – [Activate now](#)

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

Manage Account Information
Applicant Information Applicant: Paper Joe Mail In Recruitment: Assistant Professor of Dream Job
ApplicantID Information Notified that No application was added: Added on: Nov 03, 2011 at 5:55pm Received on: Nov 03, 2011 Activated: No Activating access will send the applicant an email with instructions on how to log in and manage their application. The email will be sent to paperjoe@somewhere.edu 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.

Activate applicant access
Send an email to Manually Added at another@bla.bla An incorrect email address could allow somebody else to access this person's application To the best of my knowledge, the email address another@bla.bla belongs to Manually Added <div> Information is correct – Activate access Cancel </div>

Basic Qualifications

The first order of business is to differentiate applicants who meet the basic qualifications from those who don't. This reduces the time the committee spends on reviewing applications. This is also needed in order to produce an accurate Diversity Report that meets the requirements of the U.S. Department of Labor/ Office of Federal Contractor Compliance Programs (OFCCP).

IMPORTANT! Always use objective, non-comparative, relevant, and verifiable criteria. Contact UCI’s Office of Equal Opportunity & Diversity for any help deciding which applicants meet or do not meet basic qualifications.

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.

Basic Qualifications:

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**.

Qualified

Unknown

Unqualified

Entire Pool

Show

Hidden (0)

Status

Not complete

Read:

Read

Unread

Visibility:

Hide

Unhide

Basic Qualifications:

Meets

Unknown

Does Not Meet

Send Bulk Email

<div><input type="checkbox"/></div>	Personal Note	Applicant	Highest Degree	Current Position	Status
<div><input type="checkbox"/></div>	<div>Add</div>	<div><div>Johns, Wilbert</div><div><div><div><div></div><div></div><div></div></div></div><div><div>Manage</div><div>Log</div><div>Download</div></div></div></div>	<div><div>et esse</div><div>Eius Ut Institute</div><div>2012-10-02 03:29:52</div></div>	<div><div>Alias College</div><div>Ea Nemo</div></div>	<div><div>Not complete</div><div>by applicant</div></div>
<div><input type="checkbox"/></div>	<div>Add</div>	<div><div>Grimes, Heber</div><div><div><div><div></div><div></div><div></div></div></div><div><div>Manage</div><div>Log</div><div>Download</div></div></div></div>	<div><div>PhD</div><div>Enim School</div><div>2012-10-02 03:29:52</div></div>	<div><div>Enim College</div><div>Quia Ut</div></div>	<div><div>Complete</div><div>by Kim Gerrard</div><div>May 13, 2015 4:49pm</div></div>
<div><input type="checkbox"/></div>	<div>Add</div>	<div><div>Burke, Winston</div><div><div><div><div></div><div></div><div></div></div></div><div><div>Manage</div><div>Log</div><div>Download</div></div></div></div>	<div><div>PhD</div><div>Sit School</div><div>2012-10-02 03:29:52</div></div>	<div><div>University of Connecticut</div><div>Corporis Debitis</div></div>	<div><div>Complete</div><div>by applicant</div></div>

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**.

Qualified

Unknown

Unqualified

Entire Pool

Show

Hidden (0)

Read:

ReadUnread

Visibility:

HideUnhide

Basic Qualifications:

MeetsDoes Not Meet

Send Bulk Email

<div><input type="checkbox"/></div>	Personal Note	Applicant	Highest Degree	Current Position	Status	Last Update
<div><input type="checkbox"/></div>	<div>Add</div>	<div>Grimes, Heber</div> <div><div><div></div><div></div><div></div></div><div><div>Manage</div><div>Log</div><div>Download</div></div></div>	<div>PhD</div> <div>Enim School</div> <div>2012-10-02 03:29:52</div>	<div>Enim College</div> <div>Quia Ut</div>	<div>Complete</div> <div>by Kim Gerrard</div> <div>May 13, 2015 4:49pm</div>	<div>May 13, 2015</div>
<div><input type="checkbox"/></div>	<div>Add</div>	<div>Burke, Winston</div> <div><div><div></div><div></div><div></div></div><div><div>Manage</div><div>Log</div><div>Download</div></div></div>	<div>PhD</div> <div>Sit School</div> <div>2012-10-02 03:29:52</div>	<div>University of Connecticut</div> <div>Corporis Debitis</div>	<div>Complete</div> <div>by applicant</div>	<div>May 13, 2015</div>

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.

Basic Qualifications:

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.

Qualified						
Read: <input type="button" value="Read"/> <input type="button" value="Unread"/>		Visibility: <input type="button" value="Hide"/> <input type="button" value="Unhide"/>		Basic Qualifications: <input type="button" value="Unknown"/> <input type="button" value="Does Not Meet"/>		Disposition Reasons: <input type="button" value="Assign Reasons"/>
<input type="checkbox"/> Personal Note	<input type="checkbox"/> Add	Applicant	Highest Degree	Current Position	Status	Last Update
		Thompson, Margaret	voluptas velit Maiores Research Division 2012-10-02 03:29:52	Perferendis School Est Ullam	Complete by applicant	Oct 28,
		Simonis, Fay	sunt nam Nesciunt Institute 2012-10-02 03:29:52	Voluptatem Molestiae College Deleniti Cum	Complete by applicant	Oct 28,
		Predovic, Sammie	vitae eligendi Est School 2012-10-02 03:29:52	Omnis Research Division Odit Voluptatem	Complete by applicant	Oct 28,

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."

Basic Qualifications:

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."

Unqualified						
Read: <input type="button" value="Read"/> <input type="button" value="Unread"/>		Visibility: <input type="button" value="Hide"/> <input type="button" value="Unhide"/>		Basic Qualifications: <input type="button" value="Meets"/> <input type="button" value="Unknown"/>		Disposition Reasons: <input type="button" value="Assign Reasons"/>
<input type="checkbox"/> Personal Note	<input type="checkbox"/> Add	Applicant	Highest Degree	Current Position	Status	Last Update
		Stark, Jane	a Incidunt Odio School 2012-10-02 03:29:52	Officiis Dicta School Liberio Quas	Withdrawn by Kim Gerrard Oct 2, 2013 9:34am	Oct 2, 2013

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**.

Basic Qualifications:

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.

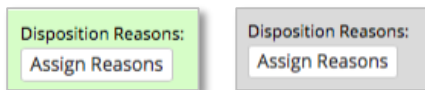
Disposition Reasons

Disposition reasons are an important component of the final Search Report and reasons must be assigned to ALL applicants, both qualified and unqualified. Work with your search committee to help with disposition reasons.

To assign disposition reasons for **Qualified** applicants, click the tab marked Qualified. This displays all applicants that have been marked as "Meets basic qualifications." If no names appear, please return to the help section, [Meets Basic Qualifications](#) and read the documentation for marking the qualified applicants.

To assign disposition reasons for **Unqualified** applicants, click the tab marked Unqualified. Disposition reasons for unqualified applicants will justify why those applicants did not meet the basic qualification and therefore, were not considered as viable candidates for the position.

Put a check in the boxes beside the applicant names that you want to mark disposition reasons for. Click the button "Assign Reasons" which appears at the top of both of these pools in the corresponding colored band.



The assignment screen opens with your selection of names in a list.

Select Reason One-By-One: Place your cursor in the applicant's adjacent box and select a reason from a choice list. Multiple reasons are permitted. Use the comment field if needed. Reasons and comments are saved automatically. Click "Done" to return to the respective applicant pool.

Assign Disposition Reasons			
New and updated disposition reasons and comments are saved automatically			
Applicants marked as Meets basic qualifications			
1 applicant selected out of 3 applicants available			
		Edit disposition reasons for selected applicants	Edit comments for selected applicants
<input type="checkbox"/>	Applicant	Status	Disposition Reason(s)
<input checked="" type="checkbox"/>	Roberts, Isaac	Complete	<div> <div>Job talk showed some deficiencies</div> </div>
<input type="checkbox"/>	Treutel, Eleazar	Complete	<div> <div>Type the disposition reason to get started</div> </div>

Select Reason in Bulk: For large pools, it may be faster to mark reasons (or comments) for multiple applicants at once. To do this, click this button at the top of the assignment screen:

Edit disposition reasons for selected applicants

Check the reason(s) from the selection list and click **Apply**. This time reasons will be applied to all applicants in your list at once. You may still edit individual applicant's reasons one-by-one.

Applicant	Status
<input checked="" type="checkbox"/> Farrell, Brenda	Complete
<input checked="" type="checkbox"/> Fay, Emily	Withdrawn after recommend for interview
<input checked="" type="checkbox"/> Herzog, Adalberto	Complete
<input checked="" type="checkbox"/> Mead, Margaret	Recommend for interview

Applicants marked as **Meets basic qualifications**
4 applicants selected out of 101 applicants available

Edit disposition reasons for selected applicants

- ☐ A. File warrants additional info via Skype
- ☐ Alternate for position
- ☒ B. As a result of Skype interview, not as strong...
Will be added to 2 applicants. [undo](#)
- ☒ Duplicates or significantly overlaps existing area of strength in department/school/college
- ☒ Interview showed some deficiencies
Will be added to 3 applicants. [undo](#)
- ☐ Job talk showed some deficiencies
- ☐ Lacks sufficient clinical experience
- ☐ Lacks sufficient contributions to diversity/cultural competence
- ☐ Lacks sufficient depth/breadth of research/creative excellence or impact
- ☐ Lacks sufficient leadership experience for position

Apply Cancel

Statuses and Short-listing

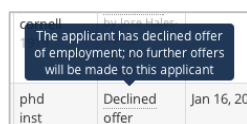
Which status is considered “shortlisted?” The shortlist consists of all applicant statuses beyond Serious consideration. Those include: Recommend for interview, Interviewed, Proposed candidate, Offered, Accepted offer, Declined offer, Hired, Withdrawn, and Campus declined.

* Serious consideration is NOT a shortlist status.

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:



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



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

Manage Applicant for Nam Nooba Physics Professor (JPF00161)

Margaret Mead

Status: **Recommend for interview** **Update status**

Basic Qualifications: **Meets** Does Not Meet Unknown

Hidden: **No** Yes

3. Recruit suggests the next logical status:

New Status: **Interviewed** Choose another 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.

Current Status: Complete

New Status:

- ☒ **Serious consideration:** Applicant should be considered for the shortlist
- ☐ **Recommend for interview:** Applicant recommended for interview
- ☐ **Interviewed:** Applicant has been interviewed
- ☐ **Proposed candidate:** Applicant recommended for appointment
- ☐ **Offered:** Approvals have been obtained and a formal offer has been made to the applicant
- ☐ **Accepted offer:** Approvals have been obtained and a formal offer has been accepted by the applicant
- ☐ **Declined offer:** Approvals have been obtained and a formal offer has been declined by the applicant
- ☐ **Hired:** Applicant entered in payroll system in searched title
- ☐ **Withdrawn:** Applicant has withdrawn themselves from consideration

Update Status Cancel

Need to choose a status not listed here? **Unlock**

Choices will vary depending on the current status of the applicant.

"Unlock is available only to Recruit Administrators."

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

Decline reasons

Select at least one reason:

- ☐ Family Reason - Child Care/Elder Care
- ☐ Family Reason - Spousal/Partner Career Opportunity
- ☐ Cost of Living
- ☐ Salary & Benefits
- ☐ Professional Support
- ☐ Other
- ☐ Unknown

Select a reason why the selected candidate withdrew.

Offer Proposals

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

Changes to Make

Status change: Current status **Interviewed** New status **Proposed candidate**

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 for Professor of Dream Job #1 (JPF00508)

Americo Kautzer Done

Status: **Applied** Update status Basic Qualifications: **Unknown** Meets Does Not Meet Shortlisted: **No** Hidden: **No** Finalized: **No**

Overview Next >

Information Documents & References Comments & Flags Visit/Seminar

Documents [Jump to Documents](#)

Applicant Documents

[Curriculum Vitae](#) Required
Last updated: Apr 16, 2013
Your most recently updated C.V.

Letters of Reference

[Neal Boehm, Yale University](#)
Last updated: Apr 16, 2013

Comments [Jump to Comments](#)

Your Comment
Your comment will be displayed to the rest of the search committee.

My 2 cents.

Kim Gerrard (kgerrard@uci.edu) Add Comment

Flags [Jump to Flags](#)

Display to reviewers Add Flag

Next >

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 for Professor of Dream Job #1 (JPF00508)

Americo Kautzer Done

Status: **Applied** Update status Basic Qualifications: **Unknown** Meets Does Not Meet Shortlisted: **No** Hidden: **No** Finalized: **No**

Overview **Information** Documents & References Comments & Flags Visit/Seminar

Applicant Status [Edit](#)

Applied

Applicant Information [Edit](#)

Contact Information

Name: Americo Kautzer
Email address: salen@emser.name
Phone number:
Mailing address: 681 Zoie Camp Wilmerhaven, Texas 39179-4217
Web address:

Employment Information

Current affiliation: Laudantium School
Current job title: Autem Culpa

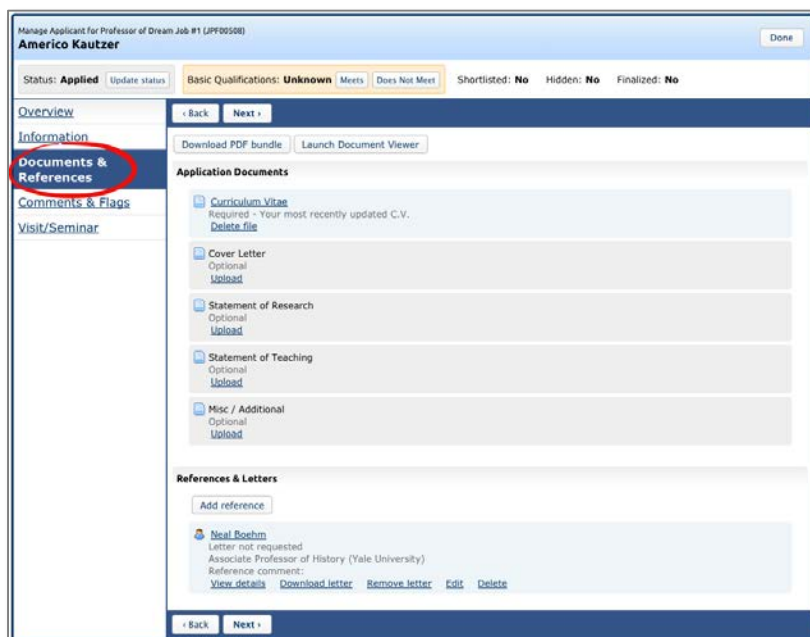
Degree Information

Degree name: et numquam
Degree institution: Ea College
Date of degree: 2012-04-14 13:56:16
PHD Advisor (1): Emmett Adams MD
PHD Advisor (2): Mrs. McKenna Gleason
Dissertation Title: Quia distinctio recusandae illum et dolores in perspiciatis.

Back Next >

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.



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**.

References & Letters

[Add reference](#)

 No references provided

Mai Colleague

 Letter not requested

 My Colleague (Chair)

[View details](#) [Send letter request](#) [Upload letter](#) [Edit](#) [Delete](#)

3. The following email template opens. All fields are editable.

Send Letter Request

To
Mai Colleague <maicolleague@somecollege.edu>

Subject
Request for letter of reference for Adrian Applicant – XYZ Recruitment

Body

Dear Mai Colleague,

You are invited to submit a letter of reference for Adrian Applicant for the position of XYZ Recruitment at the University of California, Irvine.

[Log in information...](#)

Signature

Thank you for your time.

See Analyst
Dept Address
University of California, Irvine

[Confidentiality statement...](#)

[Send request](#) [Cancel](#)

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

Reference Details

Name
Mai Colleague

Email
maicolleague@somecollege.edu

Affiliation
Chair

Phone number

Mailing address
12345 Somewhere Blvd
Chicago, IL

[Done](#) [Edit reference](#)

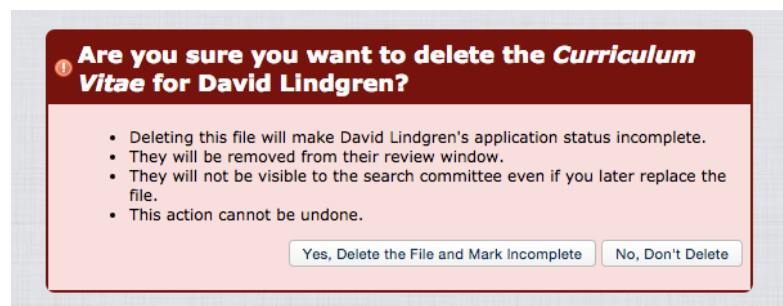
Delete a reference or a letter in any of the 3 cases outlined above. A confirmation/warning appears:

Are you sure you want to delete reference *Mai Colleague* For marian marian?

- This action cannot be undone.
- Any files associated with this reference will be deleted.

[Yes, Delete](#) [No, Don't Delete](#)

In an IRD recruitment, deleting a required document (such as a CV or letter of reference) from a completed application will mark the applicant as Incomplete. Replacing the documents will move the applicant into the current search pool. This cannot be undone. See confirmation/warning below:



Note: If the required document is deleted *after* the applicant is shortlisted, the applicant will *not* be marked as Incomplete, and they will remain in their original search pool.

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.

A form titled "Upload Reference Document" with a blue header. Below the header, there is a yellow box containing instructions:

- Please upload a PDF or a supported media file type. [Learn more about supported file types](#)
- Don't forget!** Send a thank you email and a copy of the [confidentiality statement](#) to the reference after uploading their letter

 Below the yellow box, the form displays:

- Position: Professor of Magic Potions & Arts (OCF)
- Applicant: Professor Snape
- Reference: Margaret Hoodowser
- File: [Choose file](#) no file selected
- Optional Description:

 At the bottom, there are two buttons: "Upload" and "Cancel".

Manage the Applicant's Comments & Flags

A screenshot of the "Manage Applicant for Super Best Job (Psych) (JPF00440)" interface. The top bar shows the applicant's name "Margaret Mead" and a "Done" button. Below this, there are tabs for "Status", "Basic Qualifications", "Hidden", and "Completed". The "Status" tab is active, showing "Selected candidate" and "Update status". The "Basic Qualifications" tab shows "Meets", "Does Not Meet", and "Unknown". The "Hidden" tab shows "No" and "Yes". The "Completed" tab shows "No" and "Yes". Below the tabs, there is a sidebar with links: "Overview", "Information", "Documents & References", "Comments & Flags" (highlighted with a red circle), and "Visit/Seminar". The main content area shows the "Comments & Flags" section. It has a "Flags" section with a text input field, a "Shown to reviewers" checkbox, and an "Add Flag" button. Below this is a "Comments" section with a text input field, a "Your Comment" checkbox, and an "Add Comment" button.

Flags. Flags are intended to be a unique set of labels applied to applicants to help categorize them. Enter a flag in the box provided and click **Add Flag**. Check the box if you wish to hide the flag from reviewers. You may edit or remove other's flags with the **Edit | Remove** links.

Comments. Comments are displayed to the entire search committee. They should be limited to those that are job-related, as all comments become part of the electronic record. Enter a comment in the box and 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**.

- 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 screenshot displays the 'Visit/Seminar' screen for Amerigo Kautzer. The interface includes a top navigation bar with a 'Done' button. Below the navigation bar, the status is 'Completed' and 'Update status' is available. The 'Basic Qualifications' section shows 'Meets', 'Does Not Meet', and 'Unknown' options. The 'Shortlisted' status is 'No', 'Hidden' is 'No', and 'Finalized' is 'Yes'. The left sidebar contains links for 'Overview', 'Information', 'Documents & References', 'Comments & Flags', and 'Visit/Seminar' (which is highlighted). The main content area is divided into sections: 'Information' (Title: Job Interview, Summary: Meet and greet Chair and others, Bio: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo. Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt. Neque porro quisquam est, qui dolorem ipsum quia dolor sit amet, consectetur, adipisci velit, sed quia non numquam eius modi tempora incidunt ut labore et dolore magnam. Main Event Time: Tuesday, April 30th, 2013), 'Schedule' (Timeline: Tuesday, April 30th, 2013, 10:00am 11:00am Meeting with History Dept TBD, 2:00pm 3:00pm Housing Office University Hills), 'Printer Friendly Versions' (Links open in a new window, Flyer, Itinerary), and 'Manage' (Delete this entire visit/seminar). The bottom of the screen has 'Back' and 'Save & Done' buttons.

The completed visit/seminar information.

Part 3: Reporting

Applicant Pool and Shortlist Reports

Analysts may create two types of diversity analysis reports and solicit approvals by key people whom they will identify through a roles list. Typically Department analysts create diversity reports and submit them for approvals. However, central campus Diversity Analysts, and campus Equity Advisors may also create shortlist reports for their own use. The central campus Diversity Analyst also has the option to override the default dataset (based on title code/hiring type) to create a report using different availability data.

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.

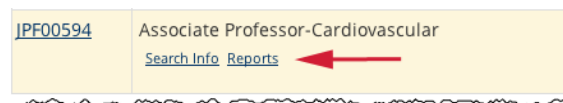
The Shortlist Report

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**. Those who are designated as shortlist report approvers will have access to all information on this report.

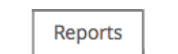
See samples of both types of diversity reports below.

Creating the Reports

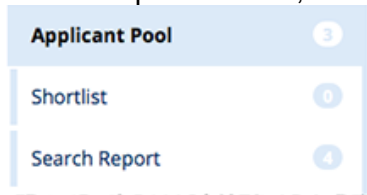
1. From the main Recruitment page, locate the recruitment and click the link, *Reports*.



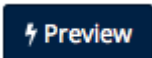
2. Or click the *Reports* tab from the Search Info screen or from the top of the list of applicants.



3. On the Reports screen, click the type of report you wish to create.



4. Click *Preview* to see the report before creating it. Make any changes necessary.



5. Click the button to create the report you need.

+ Create New Applicant Pool Report

+ Create New Shortlist Report

6. A summary appears. Click *Create Report* when ready.

Create New Diversity Report

Recruitment Properties

Recruitment	Professor of Arithmancy
Job #	JPF00617
Department	Department DEF
Salary control #	477372
Specialties	Campus: Algebra
Title codes	1100: PROF-AY
Report type	Shortlist
Diversity data set	<input checked="" type="checkbox"/> Shortlist <input type="checkbox"/> Applicant Pool

Applicant Pool Statistics

# meets basic	11
# does not meet basic	1 will not be included in report
# basic qualifications unknown	1 will not be included in report. Consider reviewing before creating a report
# on shortlist	0

Create Report Cancel

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:

Applicant Pool Statistics

online applicants: 0

applications: 0

7. A success message confirms the report has been created.

Success

New Report Successfully Generated.

8. Applicant Pool and Shortlist sections indicate the status of the reports.

- The “Date Generated” column keeps a running tally of all reports created throughout the search.
- The “Download” link opens a PDF of the report.
- Color-coded boxes indicate the status of the particular report's approvals.

Jan 14, 2015

Submitted on Jan 13, 2015

✓ 3 ⚙ 0 💬 9

Q Approved Download

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 Quidam
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 so 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
56	62	95	0	215
48.3%	51.7%	n/a	n/a	% of respondents (215)
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 Inline AP Recruit on Feb 12, 2014 at 3:12pm. All percentages rounded to the nearest tenth (e.g., 95.544% -> 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 - Faciles Floprehendent Quidam Recruitment - 2011 - 2012
Generated Jan 8, 2013 at 12:11pm

About This Recruitment

Job number JPF00160
Salary control # 477372
School School of Occascul In
Department Department of Laboratorium 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

Appendix 1: 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%	2.2%	7.5%	0.4%	15.3%	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 (25)
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
8	3	3	2	11	5	1	0	17
18.8%	18.8%	18.8%	12.5%	60.0%	29.2%	n/a	n/a	% of respondents (25)
17.6%	17.6%	17.6%	11.8%	54.1%	25.4%	5.3%	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	0	1	5	1	0	6
0.0%	33.3%	0.0%	0.0%	16.7%	83.3%	n/a	n/a	% of respondents (6)
0.0%	16.7%	0.0%	0.0%	16.7%	83.3%	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%	33.3%	0.0%	33.3%	66.7%	66.7%	n/a	n/a	% of respondents (6)
0.0%	16.7%	0.0%	16.7%	33.3%	50.0%	16.7%	0.0%	% of total seriously considered

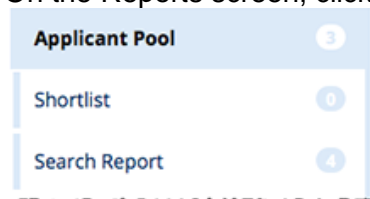
Short List

Name	Status
David, Bridget	Accepted offer
Finn, Dana	Offered
David, Mike	Proposed candidate
David, Mike	Proposed candidate

Diversity Reports Approvals

Submit an APPLICANT POOL REPORT or SHORTLIST REPORT for review at different points of the search.

1. On the Reports screen, click Applicant Pool or Shortlist.



2. Find the report in the Date Generated column and click the link, "Submit as new approval." The following confirmation box opens:

 A confirmation dialog box with a title bar that says 'Are you sure you want to submit this report for approval?' and a close button (X). The main content area contains the text: 'This report will be submitted for a **new round** of approvals. Using workflow "**Applicant Pool Diversity-All**", which includes the following steps:'. Below this is a list of steps: '1. Committee Chair' with a sub-note 'You will be able to add steps after creation.' Below the list is the text: 'If this is not the correct workflow, please contact [Support](#).' At the bottom are two buttons: 'Yes, submit for approval' (dark blue) and 'Cancel' (light blue).

3. There may be a system-assigned workflow containing a list of approver's roles in a progression. If you think this workflow is incorrect, stop here and report this using the *Support* contact link. Otherwise, click, **Yes, submit for approval**.
4. Make sure all roles are assigned names of people in those roles. If not, **specify a person**.
5. Add any additional steps or alternate approvers if needed.
If needed, use the Comments section to communicate with your approvers.

Automatic Approver Emails: At each step, Recruit sends email to approvers that their approval is needed and the submitter receives a copy.

- The email includes a direct link to the approval screen where approvers may download the report, comment, and approve.
- When Recruit detects an approval, the next in line is notified.
- After the last step approves, Recruit sends a notification to the submitter with next steps to take.
- Approvers may choose to opt out of email notifications.

Additional Email Notifications: Optionally use the "Notify Approvers" button for further communications along the workflow. For example, use this to: Prod the approver who's taking too long, warn the pending approvers about what's coming their way, or highlight a change that previous approvers might need to know about.

All emails 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."*

Updating Approvals

Scenario: The analyst has submitted a report for approval 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.

What updating the approval does:

- New approvers in the workflow will download the new, replaced report.
 - A comment on the approval screen will be added to document the change. All original comments are retained too.
 - Email notices inform previous approvers that the report they approved was updated. Previous approvers will not be required (or able) to re-approve.
1. First, gather any documents and make all necessary changes to correct the report.
 2. On the Reports screen, click the Applicant Pool or Shortlist section.
 3. Click the corresponding button to create the new report. The new report will appear in the Date Generated column.
 4. To replace report already in transit with the corrected report, click the link “Update approval.”
 5. Choose the replacement report from the drop-down menu.
 6. Add a reason for the update.
 7. Click *Yes, update report*.

Are you sure you want to update the report being approved?

Replace with:

Choose a new report

Jan 14, 2015 at 2:43pm 0.0%

1 applicant; 1 on shortlist

- Approvers will now download the new report
- A comment will be added in your name to note the change
- An email will be sent to those who have already approved so that they can verify the change

Please note the reason for the update:

This will be used in your comment and in the email to existing approvers.

Please select a replacement [Cancel](#)

Search Reports

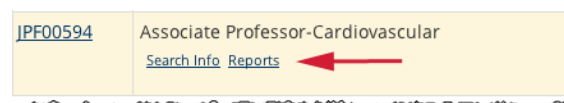
Search Report Components:

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. Be as thorough as possible to ensure approvals.

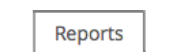
1. **The recruitment details:** General information including the recruitment name, department name, and recruitment period, etc will be automatically pulled into the Search report from the Plan.
2. **Search Outcome:** At a glance, this documents whether the search was successful, failed, or canceled. You will be prompted to complete the search outcome if you haven't already done so.
3. **Information about proposed 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.
4. **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)).
5. **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.
6. **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.
7. **Actual Search and recruitment efforts:** You will be prompted to enter this information and the report can't be generated until this is done.
8. **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.

Creating Search Reports

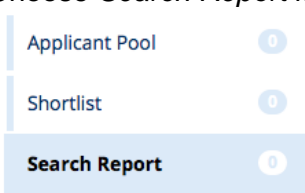
1. From the main Recruitment page, locate the recruitment and click the link, *Reports*.



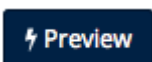
2. Or click the *Reports* tab from the Search Info screen or from the top of the list of applicants.



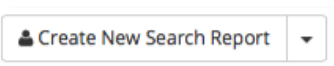
3. Choose *Search Report* from the reports menu.



4. Click *Preview* to see the report before creating it. Make any changes necessary.



5. Click **Create New Search Report**.



- Title the report in the space provided.

Create New Search Report

Search reports contain summary information about the recruitment, including information about any applicants with the status "Selected Candidate" or later, including any files uploaded to the Documentation tab.

*** Name of report**

Create Search Report [Cancel](#)

- Then click **Create Search Report**.
- Your new report will appear in your listing as the *Current Report*.
- Analysts may rename Search reports — but only up until the final approval is received. Use the Edit button beside the report to change the name. If the Edit button doesn't appear, it's too late to rename it!



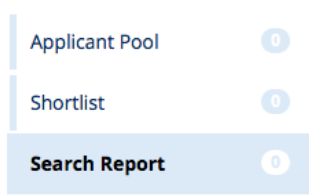
Search Report Approvals

To initially submit a Search report, follow the same instructions as for submitting Applicant Pool and Shortlist reports.

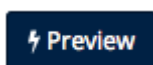
Live-Updating of Search Reports

Make any changes to the Search Report as necessary and all approvers will see those changes as soon as they happen.

- Update any of the components of the report as needed.
- Then return to the Search Reports screen and choose *Search Report* from the reports menu.



- Click *Preview*. The changes you've made will be evident.



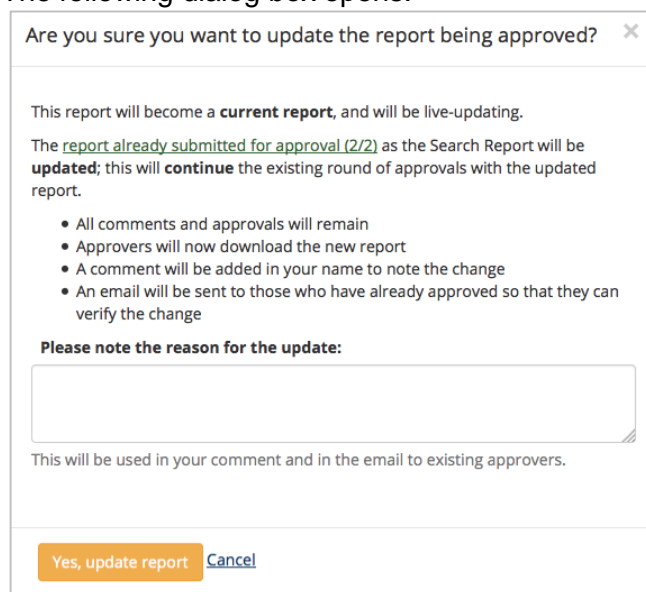
- Use the **Notify Approvers** button on the approval screen if you want to send an email about the change that previous approvers should know about.



Existing Report (Saved Search Reports)

Recruit stores all existing search reports in the "Saved Reports" section. The reports maintain their original content, approval status and list of signatures gathered. If you need to update a saved and previously-submitted search report, you can simply convert that search report to be live-updating, and any changes made will be reflected immediately.

1. Find the report in the "Saved Reports" section and click on *Update approval*.
2. The following dialog box opens:



Are you sure you want to update the report being approved? ✕

This report will become a **current report**, and will be live-updating.

The report already submitted for approval (2/2) as the Search Report will be **updated**; this will **continue** the existing round of approvals with the updated report.

- All comments and approvals will remain
- Approvers will now download the new report
- A comment will be added in your name to note the change
- An email will be sent to those who have already approved so that they can verify the change

Please note the reason for the update:

This will be used in your comment and in the email to existing approvers.

[Yes, update report](#) [Cancel](#)

3. Type the reason for the update. The reason will become part of the electronic record found in the comments section on the approval screen.
4. And click *Yes, update report*.
5. The report becomes the current report and will be converted to be live-updating. Approvers will now download the new report.
6. An email will be sent to those who have already approved so that they can verify the change.

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 Recruitment Details Diversity Reports Search Committee Applications (95)	Earth System Science	Open 9/19/2011 – 6/30/2012	Make Inactive

The Make Inactive link effectively archives the recruitment.

To Re-activate a 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://recruit.ap.uci.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*.

The screenshot displays the UC Recruit Applicant Dashboard. At the top, there is a navigation bar with five tabs: "My Dashboard" (active), "My Information", "My Files", "My References", and "Diversity Survey". Below the navigation bar, the dashboard is divided into several sections:

- Application Status: Submitted** (highlighted in blue):
 - Awaiting 1 letter of reference
 - [Contact the recruiting department](#) with any questions.
- Recruitment Status**:
 - Accepting modifications to existing applications and new applicants
 - Last day to make changes is Saturday, Mar 1, 2014 by 11:59pm (Pacific Time)
 - New applicants accepted until February 15th, 2014.
 - [Learn more about this position](#)
- Need Help?**:
 - [Frequently asked questions](#)
 - [Help documentation](#)
 - [Contact position support](#)
- Learn more about UCI**:
 - [UCI Homepage](#)
 - [Today@UCI - news and events](#)
 - [UCI employment information](#)
- Want to apply for another position?**:
 - You must create a new, separate ApplicationID for each position you apply to:
 - 1. [Logout from this position](#)
 - 2. Click "Browse other recruitments or log back in" to see the list of open recruitments
 - 3. Locate the position to which you would like to apply and click the "Apply to this position" link
 - 4. Create a new account with a different user name for the new position

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 Information

Contact Information [Update](#)

Name Rhonda, Chase
Email somewhere@fake.edu
Phone 980-789-5676
Website http://rhondachase.wordpress.com
Address 1234 Street Way
 Vida, CA 29798

Current Employment Information [Update](#)

Affiliation/University U of Minn
Title Assistant Professor

Highest Degree Information [Update](#)

Highest degree Phd
Institution U of Milan
Date obtained 1999
PhD Advisors Not provided
Dissertation Not provided

Account Information

Username rhondachase
[Change username](#)

Password Not displayed
[Change password](#)

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 Files

Please upload all required documents: **1 remaining**

Curriculum Vitae [Upload](#)
 Required
 Your most recently updated C.V.

Cover Letter [Upload](#)
 Optional

Statement of Research [Upload](#)
 Optional

Statement of Teaching [Upload](#)
 Optional

Misc/Additional [Upload](#)
 Optional

Alternate Submission Information [Show](#)

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 Irvine 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://recruit.ap.uci.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 Irvine Recruit: Approval Request [name of recruitment].

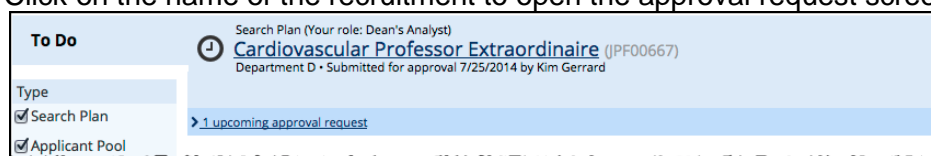
- For the exact wording, see Appendix B, “Notifications Sent to Approvers.”
- Approvers are prompted to log into Recruit with a direct link given in the email.
- The approval screen appears where the user will view, approve, or comment on the item.
- Approvers may opt-out of future notifications using the link in the email.

2. Or bypass the email and log into Recruit directly

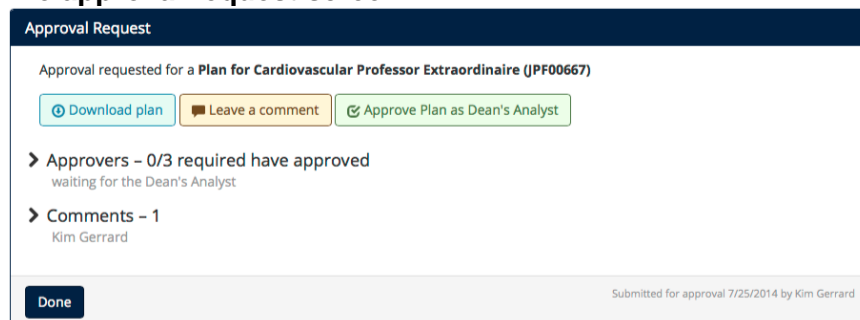
- Navigate to <https://recruit.ap.uci.edu/> and click “UC Irvine Faculty & Administrators.”
- Once logged in, the Home screen will display the link to any pending approvals:

 [1 approval request is available for your review >](#)

- 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.

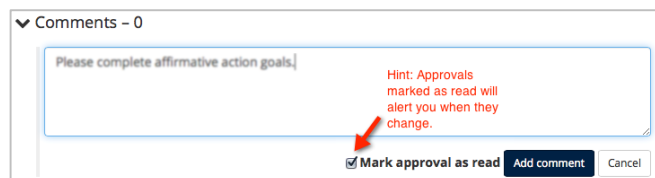


The approval request screen:



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.

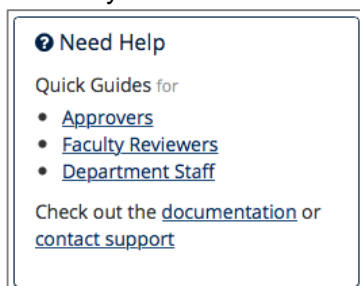
> Comments: expand the comments arrow to read comments left by others.

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.



Recruitments leads to all those which the reviewer has been assigned access.



Reviewers may link to the approved search Plan and also to the applicant pool. The number in parenthesis is the total number of *completed* applications.

JPF02452	Associate or Full Professor - Computational Neuroscience Search Info Applicants (48)
--------------------------	---

Applicant Pools

Most of the same tools are available to Reviewers. See previous section, *Tools To Use With the Applicant List.*

For reviewers, the applicant pool opens to the green, *Qualified* view. This view represents all completed applicants who have been identified as meeting the basic qualifications. The analyst, editor and/or committee chair mark the qualified and unqualified applicants.

Assistant Professor of Dream Job

JPF00531 • Department booya / A School of Aliquid BC

Search Info Applicants (5)

Contact: Marian Nedelchev

Download This Data Download Names & Addresses Change Columns

Name, note, reference, etc. Search

Qualified

Read: Read Unread

Unknown

Unqualified

Entire Pool

Status

☒ Complete

☒ Serious consideration

☒ Proposed candidate

Review Window

June 12th, 2013

July 6th, 2013

August 6th, 2013

November 9th, 2013

Personal Note	Applicant	Highest Degree	Current Position	Status
<input type="checkbox"/> Add	First, Hugo Log Download	phd Yale 2000	Yale Post Doc	Complete by applicant
<input type="checkbox"/> Add	Hsieh, Kai Log Download	PhD UCB 1980	University of Colorado Assistant Professor	Proposed candidate by Kim Gerrard Dec 2, 2013 4:08pm
<input type="checkbox"/> Add	O. Early, Amadeus Log Download	phd Yale 1980	Harvard Assistant Professor	Complete by Recruit System Nov 8, 2013 3:40pm
<input type="checkbox"/> Add	Payne-Diaz, Begonia Log Download	PhD UConn 2001	University of Southern Illinois Post Doc	Serious consideration by Kim Gerrard Dec 2, 2013 4:07pm

Found 4 matches

To review individual applications, reviewers click on the name of an applicant in the list. The following view opens:

Jim Shorts
Prof extraordinaire, SIU

Basic Qualifications: Unknown Status: Complete Last updated: Jan 20, 2015 at 3:03pm Mark as Read

Visit/Seminar: Tuesday, January 20th, 2015

Contact [Ace Analyst](#) with any questions about this visit/seminar

Title: Meet the candidate

Summary: Lorem ipsum fermentum aptent blandit sodosqu tempus pharetra eros venenati auctor vel conubia taciti portitor sollicitudin tempus amet viverra odio euismod una felis curae.

Bio: Bibendum quam nostra augue scelerisque accumsan tenebria, nullam ut tellus egestas vehicula facilisis.

Tuesday, January 20th, 2015

10:00am–11:00am Kick off (909 Steinhaus Hall)

About

Degree: MFA at Yale (1990)

PhD Advisor: Professor Chase

Email address: jshorts@blah.bla

Website: <http://jimshorts.wordpress.com>

Phone #: 949-245-1234

Address: 12345 University Av Carbondale, IL 69098

Documents [Viewer](#)

Curriculum Vitae [Download \(Required\)](#)

Cover Letter [Download](#)

Statement of Research [Download](#)

Letters of Reference 1-5 required

Holly Unlikely Letter requested but not yet uploaded

Review [Download PDF Bundle](#)

Personal Note Not shared with the committee
Limit personal notes to those that are job-related. All personal notes become part of the search record and may be accessed through a public records request or during an audit.

[Add a Personal Note](#)

Public Comments The entire committee sees these
Limit comments to those that are job-related. All comments become part of the search record and may be accessed through a public records request or during an audit.

Your Comment

[Add Comment](#) Mel Layos (mlayos@uci.edu)

Betty Committee Reviewer (ap-no-reply@recruit.ap.uci.edu) Updated Jan 15, 2015 at 10:46am
☐ Betty thinks her comment is the best.

Charlie Committee Chair (ap-no-reply@recruit.ap.uci.edu) Updated Jan 15, 2015 at 11:20am
☐ Charlie thinks his comment is the best.

Flags The entire committee sees these, unless they're hidden

☒ Analyst's hidden flag ☒ Andy's flag ☒ Edna's flag

[Display to reviewers](#) [Add Flag](#)

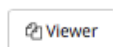
The Parts of the Application:

1. Visit/Seminar —If a Visit/Seminar has been scheduled (by the analyst, editor or chair), the summary and schedule will appear prominently at the top of the review screen.

2. About —The applicant's employment, degree and other personal information is found in this section.

3. Documents —This section contains the applicant's required or optional documents. There are THREE methods to reviewing the documents:

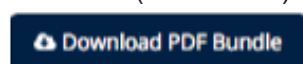
- **Viewer:** The Viewer button opens the applicant's documents within the browser frame. *Note: Browser versions and third party PDF readers may affect the use of the viewer.*



- **Download link:** Click on the hyperlinked filename to download the document to your computer. *Note: this method downloads potentially sensitive information to your machine. Use with care.*



- **Download PDF Bundle:** The Download PDF Bundle button appears in the Review section on the screen. *This is the recommended method to view all documents and letters.* Interstitial pages are placed in-between each document with the title and any other information about the document (if available).



4. Letters of Reference

- References' names and letters (if letters are a requirement) appear below the documents section.
- If the letter has been supplied, it is viewable via any of the three methods mentioned above.
- If the applicant has requested the letter, this will be indicated: "Letter requested but not yet uploaded".
- If the applicant has not yet requested a letter, this will be indicated: "Letter of Reference not yet requested".

5. Review/Personal Note —This feature is available to all reviewers and not viewable by other committee members. Notes should be limited to those that are job-related, as they become part of the electronic record.

6. Public Comments —Comments are displayed to the rest of the search committee. They should be limited to those that are job-related, as all comments become part of the electronic record.

- Comments are entered in the box provided and by clicking **Add Comment**.
- Owner's names and a time-stamp appear to others below the comment.
- One comment is permitted per applicant. You may return and add more text, but it is still considered one comment.
- Owners may remove their comment by clicking **Edit Comment** (and erasing it).
- There is no limit on the number of characters permitted in the comment field.

7. Flags —Flags are intended to be a unique set of labels applied to applicants to help categorize them.

- Flags are entered in the box provide and by clicking **Add Flag**.
- Owner's names will be displayed below your flag.
- Flags are by default, displayed to the rest of the search committee.
- Analysts, committee chairs, and editors may privatize their own flags and may privatize existing flags placed by others on a per applicant basis.

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 [applicant name].

<<<< 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. **Thank you for completing your application and survey reminder.**

- ❖ 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 [applicant name],

 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 [applicant name].

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 [applicant name].

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 [applicant name].

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 login]

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

Dear [applicant name].

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 login]

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 Irvine Recruit: Password Reset

Dear [applicant name].

You requested to reset your password for UC Irvine'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 [Reference name].

[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 online 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 [Approver name].

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](#)]

Notifications Sent to Analysts

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](#)]

Applicant Pool Report Needed

- ❖ Email is sent to the creator of the recruitment and the person who configured it for online. Often this is the same person, otherwise known as the analyst in charge of the recruitment.
- ❖ The date the reminder is sent and the wording of the message differs from campus to campus. The following is the message sent at UCIrvine:

Subject: UC Recruit: Applicant Pool Report Needed : [Super Best Job [JPF00673]

Hello [Analyst Name].

Super Best Job (JPF00673) hit its final date. Since Feb 12th, 2015 applicants can no longer edit their applications.

That means that it is time to submit an applicant pool report. This report will help you determine if you have a good pool of applicants to begin reviewing or if you should do further outreach efforts.

To submit a report:

- * Go to [\[Link to Applicant Pool reports screen\]](#)
- * Click "Create New Applicant Pool Report" and fill out the form
- * Click "Create"
- * Your new report will appear in the list, timestamped with today's date
- * Click "Submit as new approval" on your new approval
- * Verify that the approvers listed are the ones you expect
- * Click "Yes, submit for approval"
- * Fill in the names of any approvers that need to be specified

The first approver will be notified shortly. Return to the approval page often to make sure no one has any trouble. You will be notified when each signature is attained and when the approval is complete.

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:

<div> <p>From Recruit@ucdavis.edu</p> <p>Subject [Recruit] UC Irvine Recruit: Applicant Question for Assistant Professor – Ballet</p> <p>To @ucdavis.edu</p> </div>	<p>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.</p>
--	---

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).

Contact Us

My name:
Joan Applicant

My email:
joanapplicant@kasprovw.edu

Recruitment:
MN Recruitment Test

My Question:
☒ Recruitment-specific
 ☐ Technical Support
 ☐ General Question
 ☐ Missing Recruitment?

Your question or comment will be sent to technical support or the administrator for the recruitment.

Note: Please provide the recruitment/department/school information for faster assistance.

I am interested in your position but notice that it is closing tomorrow. I am just getting my materials ready today and was wondering if you could accept them late.

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

Contact Us

My name:
Joan Applicant

My email:
joanapplicant@kasprovw.edu

Recruitment:
MN Recruitment Test

My Question:
☐ Recruitment-specific
 ☒ Technical Support
☐ General Question
☐ Missing Recruitment?

Your question or comment will be sent to technical support or the administrator for the recruitment.

Note: Please provide the recruitment/department/school information for faster assistance.

I intend to apply to the position Super Best Job. After I apply will I be able to return and update my application?

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

Contact Us

My name:
Joan Applicant

My email:
joanapplicant@kasprovw.edu

Recruitment:
MN Recruitment Test

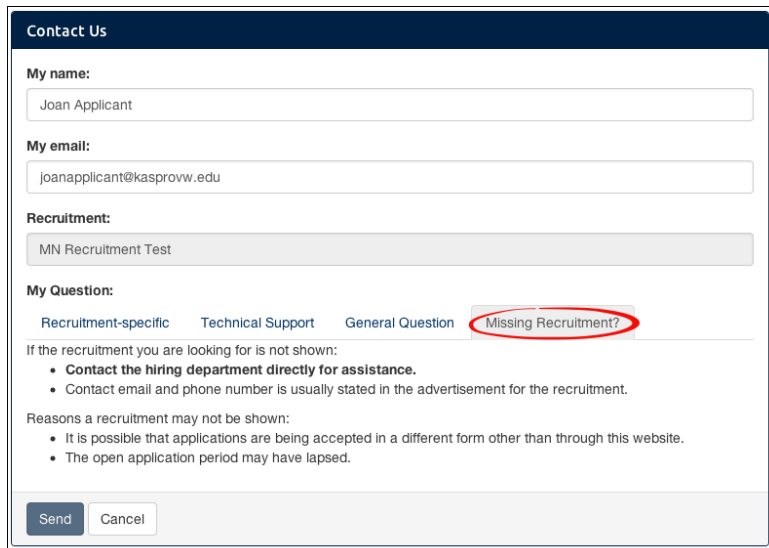
My Question:
☐ Recruitment-specific
☐ Technical Support
☒ General Question
☐ Missing Recruitment?

Your question or comment will be sent to technical support or the administrator for the recruitment.

Note: Please provide the recruitment/department/school information for faster assistance.

Am I going to need references?

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)



Contact Us

My name:
Joan Applicant

My email:
joanapplicant@kasprovw.edu

Recruitment:
MN Recruitment Test

My Question:
[Recruitment-specific](#)
[Technical Support](#)
[General Question](#)
[Missing Recruitment?](#)

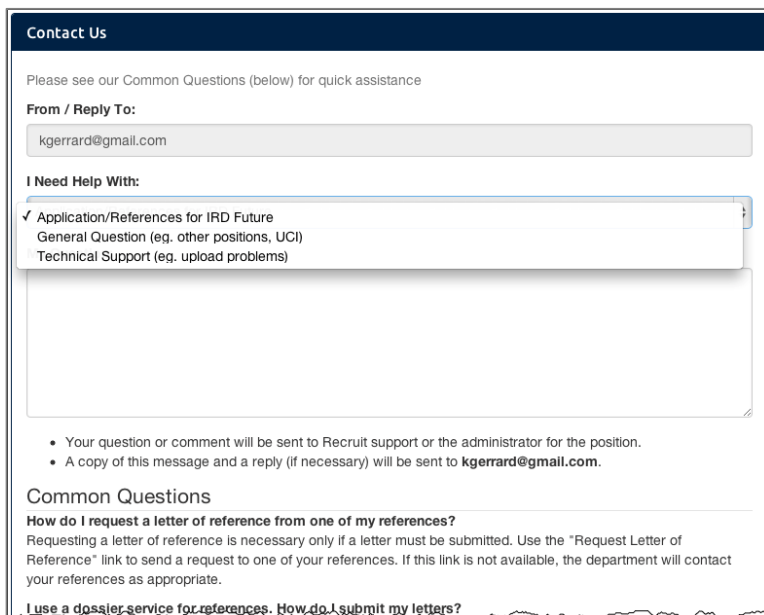
If the recruitment you are looking for is not shown:

- **Contact the hiring department directly for assistance.**
- Contact email and phone number is usually stated in the advertisement for the recruitment.

Reasons a recruitment may not be shown:

- It is possible that applications are being accepted in a different form other than through this website.
- The open application period may have lapsed.

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



Contact Us

Please see our Common Questions (below) for quick assistance

From / Reply To:
kgerrard@gmail.com

I Need Help With:

- ✓ Application/References for IRD Future
- General Question (eg. other positions, UCI)
- Technical Support (eg. upload problems)

Your question or comment will be sent to Recruit support or the administrator for the position.
A copy of this message and a reply (if necessary) will be sent to **kgerrard@gmail.com**.

Common Questions

How do I request a letter of reference from one of my references?
Requesting a letter of reference is necessary only if a letter must be submitted. Use the "Request Letter of Reference" link to send a request to one of your references. If this link is not available, the department will contact your references as appropriate.

I use a dossier service for references. How do I submit my letters?

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:

Home Recruitments Applications **Admin** Reports Help

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

Support Tools	Campus Settings	Site Settings
Find Applicants Browse and filter all applicants	Manage Front Page News Create and edit front page news items	Approval Workflows Configure default approver lists
Find References Browse and filter all references	Manage User Roles Edit, assign and remove user roles	Permission Options Configure what permissions roles have
Find Approvals Browse and filter all approvals	Manage Academic Unit Hierarchy Create and rename academic units	Features See which features are enabled on this site
Proxy as User Assume the identity of a user		Redis Info See statistics on the Redis server backing this site
Create Fake Recruitment Create a fake recruitment for training or other purpose		
Diversity Benchmark / Availability Data View availability data for 2014 - 2015		

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

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

Find Applicants

Change Columns Search

Originated	Applicant	Analyst added?	Username	Email
<input checked="" type="checkbox"/> Added by analyst <input checked="" type="checkbox"/> Not added by analyst	Nam Nooba Physics Professor			
Filter Reset	Okuneva, Zion Manage	No	rylee1	lea@champlin.biz

Found 1 match in search for "Zion"

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.

Find References

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.

Change Columns Download as CSV Search

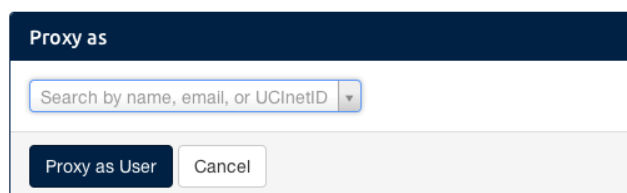
Reference	Email	Token	Applicant	JP #	Token Status
Ruben Ernser I	mackenzie.haag@kuvalis.net	1bcf1cb02207af992db9127cd6047281	Winston Burke	JPF00160	Active (Letter uploaded)

Found 1 match in search for "Ernser"

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.

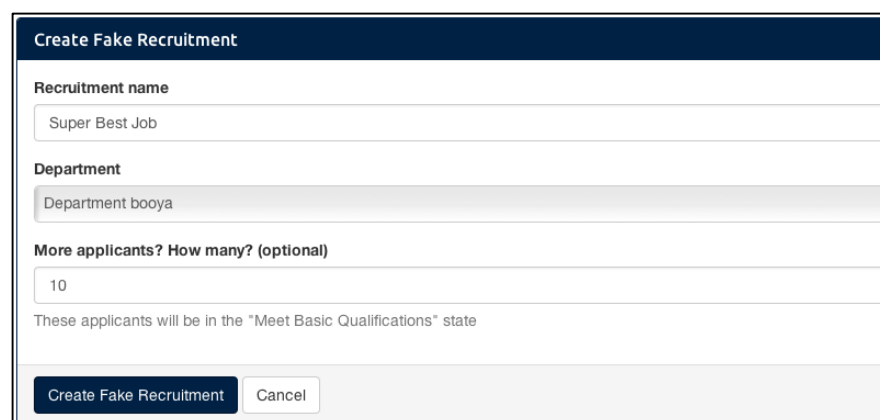
Proxy as User: Assume the role of any user in Recruit.



The 'Proxy as' dialog box features a dark blue header with the text 'Proxy as'. Below the header is a search input field with the placeholder text 'Search by name, email, or UCInetID'. At the bottom of the dialog are two buttons: 'Proxy as User' and 'Cancel'.

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.



The 'Create Fake Recruitment' form has a dark blue header with the title 'Create Fake Recruitment'. It contains three main sections: 'Recruitment name' with a text input field containing 'Super Best Job'; 'Department' with a dropdown menu showing 'Department booya'; and 'More applicants? How many? (optional)' with a text input field containing '10'. Below the third section is a note: 'These applicants will be in the "Meet Basic Qualifications" state'. At the bottom are two buttons: 'Create Fake Recruitment' and 'Cancel'.

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.

Front Page News Manager

Create News Item

Active News

Subject	Published Date	Content	Creator
We Cleaned House! Edit Archive	2013-06-11	This Recruit training/demo site has been recently refreshed and reset. All recruitments that...	Kimberly Ann Gerrard
What's New in Recruit Edit Archive	2013-06-10	For all the news on Recruit's updates and enhancements, visit our blog at http://sites.uci.edu/ap...	Kimberly Ann Gerrard

Found 2 matches

Archived News

Subject	Published Date	Content	Creator
Testing Edit Unarchive	2013-08-09	testing	Kimberly Ann Gerrard

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."

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.

Manage User Roles

[View by users](#) [View by roles](#)

Add Role for User

Search by name, email, or UCInetID Find

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z All

Full Name	UCInetID	Role	Unit/Resource	Resource Type
Bababeygy, Simon R Edit Remove Email	SBABABEY	Other Professor	Ophthalmology	Department
Babayan, Kara N	KBABAYAN	Other Professor	Urology	Department

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

Manage User Roles

View by users **View by roles**

Central AP Analyst Diversity Analyst Equity Advisor Global Administrator **Recruit Administrator** Recruit Analyst Recruit Analyst (No Reports) Recruit User Recruit User Manager ?

Full Name	UCInetID	Role	Unit/Resource	Resource Type
Chin, Jean Ling Edit Remove Proxy	JLCHIN	Recruit Administrator	recruit	Tool

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.

Manage User Accounts

[Create User Account](#)

Use the Manage User Roles admin tool to manage roles for these users

Name	User Name	Email	Department	Last Modified	Actions
Berkeley2, Academic Personnel	APUCB	oasii@berkeley.edu	Department for Berkeley	Oct 17, 2011 12:26PM	Edit Delete
BLACK, Gwendolyn Kuhns	gkuhns	gwen.black@uci.edu	Department for UCI	Oct 06, 2011 12:44PM	Edit Delete
Chin, Jean Ling	jlchin	jean.chin@uci.edu	Department for UCI	Oct 06, 2011 12:44PM	Edit Delete
Committee Chair, Charlie	cchair	kearns@uci.edu	Department for UCI	Oct 06, 2011	Edit Delete

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.

Manage Academic Unit Hierarchy

MN School(AA) [Edit](#)

Departments [Add](#)

- Wonder Department [Edit](#)

A School of Aliquid BC(AAA) [Edit](#)

Departments [Add](#)

- Department booya [Edit](#)
- Department of Ex Commodi [Edit](#)

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.

The 'Add step' dialog box contains a title bar with a close button. Below it is a section labeled '* Role' with a dropdown menu showing 'Dean's Analyst'. Underneath is a checkbox labeled 'Required' which is checked. At the bottom of the dialog are two buttons: 'Add Step' and 'Cancel'.

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

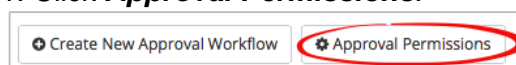
Editing an Approval Workflow: Edits will not change any approval workflow that is currently in use.

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.

Approval Workflow Permissions: This admin tool restricts Analysts from modifying the workflow design.

1. Click **Approval Permissions**.



Allow (or restrict) the analysts' ability to reorder or add steps to an approval workflow. When restricted, analysts will not see the links, *Reorder steps* or *Add step* in any workflow. Restrictions will take effect immediately, affecting any in-progress approvals.

The 'Allow analysts to' section has two checkboxes: 'Reorder steps' (checked) and 'Add steps' (unchecked). A red circle highlights the 'Reorder steps' checkbox, and a red arrow points from it to a red callout box. The callout box contains the text: 'In this scenario, analysts will be able to reorder steps, but not be able to add new steps.'

You may also fine-tune abilities based on a specific role. Pick a role from the selector box. When an ability is restricted, analysts will receive an error message. Restrictions take effect immediately,

affecting any in-progress approvals.

Restricted Roles

For Chancellor, allow analysts to

☐ Add this step

☐ Assign approvers for this step

Restrict

By unchecking both boxes, analysts will be restricted from adding the Chancellor or assigning specific people to this step.

Select any other roles/step to restrict.

2. **Save changes** when satisfied with your settings.

Permission Options: Customize what other permissions are available to the system's users. Who can publish a plan? Who can create and manage diversity reports? Who can view incomplete and late applications?

Publishing Plans as Recruitments

New plans begin in a draft state to allow review before publishing to the wider world. Who can publish a plan?

☒ **All Recruit Analysts**
If you can create a recruitment plan, you can publish it to the world.

☐ **Recruit Administrators only**
All recruitments are published by a central administrator.

Diversity Report Management

Diversity reports contain demographic information on a recruitment's applicant pool. Who manages them?

☒ **All Recruit Analysts**
Recruit Analysts are responsible for creating and managing diversity reports, and are allowed to see them.

☐ **Recruit Administrators only**
All diversity reports are created and managed by a central administrator.

Application Visibility

Incomplete and late applications are visible to:

☒ **Admins, Analysts, Chairs, and Editors**
Allows committee chairs and editors to see applicants with incomplete or late applications.

☐ **Admins and Analysts only**
Committee chairs and editors will only see applicants with complete, on-time applications.

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:

Home Recruitments Approvals Applications Admin **Reports** Help

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

UCOP Reports

UCOP Reports Applicant & Diversity Download Data

Report Type

Faculty Search Report

- ☐ Recruitment descriptions
- ☐ Core search committee composition
- ☐ Applicant pool composition
 - ☐ Only "meets basic qualifications" applicants
 - ☐ All applicants
 - ☐ Shortlisted applicants - applicants with the status of "Invited for interview" or later
- ☐ Hired applicants - applicants with the status of "Hired"

Recruitment & Retention Report

- ☐ Offers - offer data, including reasons why offers were declined

Options

Academic year: 2013 - 2014

Recruitment type: Regular Rank

[Configure Report First!](#)

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:

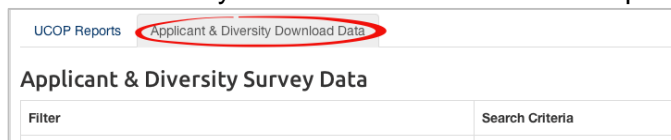
○ Offers

- 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.



The screenshot shows a web interface with a tabbed menu at the top. The first tab is 'UCOP Reports' and the second tab, 'Applicant & Diversity Download Data', is selected and highlighted with a red oval. Below the tabs is a section titled 'Applicant & Diversity Survey Data'. Under this title, there are two input fields: 'Filter' and 'Search Criteria'.

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!