This User Guide and Search Plan Checklist is a supplement to the AP Recruit User Guide.

What You Need to Know Before You Start

The Analyst’s Role
As analysts, you create and manage the recruitments for your departments. Among the many tasks, you appoint roles to committee members, solicit approvals in order to publish the recruitment, assemble the advertising plans, view and manage the applicant files, and perform required reporting. You may assign editors to help you with certain aspects of the recruitment, but it is always assumed that you will oversee your editors and offer them the assistance they need from the training you have received.

AP Recruit Log In
To access Recruit you must have a UCR NetID. If you have never activated your UCR NetID, instructions are available at http://cnc.ucr.edu/NetID/obtaining.html. You must also have an assigned role. For question or assistance regarding AP Recruit roles, please contact your College/School/Unit Recruit Analyst (http://cnc.ucr.edu/aprecruit/contacts.html) or the AP Recruit support team at aprecruit@ucr.edu.

UCR AP Recruit Home Page
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PART 1 – MANAGING THE RECRUITMENT AND APPLICANTS

Once the Search Plan has been approved, published and applicants have begun applying, you can locate the applicant pool from the Recruitments page.

A. Accessing Recruitment and Accessing Applicants (page 33, AP Recruit User Guide)

You may access your recruitment from the Recruitments page. Click on the recruitment to display the recruitment information.

You may access the applicant pool via the Recruitments page via the Applicants link. The number of applicants is displayed in parenthesis.

The first order of business is to differentiate applicants who meet the basic qualifications from those who do not. Analysts, Chairs, and Editors all have this functionality. This is 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 OFSAA at affirmativeaction@ucr.edu for any help deciding which applicants meet or do not meet basic qualifications.

1. **Unknown Applicants View** – as soon an applicant applies, Recruit places them in the Unknown category, color-coded Orange. From here:
   - Find a completed applicant.
   - Put a check in the empty box in the applicant’s row.
   - You may select multiple names and click the master checkbox at the top of the row.
   - Click the button at the top of the list of names Meets or Does Not Meet to move the applicant to the appropriate category.

2. **Qualified Applicants View** – applicants found in the Qualified/Green category are those who have been marked as meeting the basic qualifications.

3. **Unqualified Applicants View** – the Unqualified/Grey category contains applicants who have been marked as "Does not meet basic qualifications.”

4. **Entire Pool** – the entire pool tab, color-coded Blue, lists all applicants.

**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.

C. **Tools to Use With the Applicant Pool** (pages 33-38, *AP Recruit User Guide*)

1. **Column Sorting** – click directly on most column headers to sort the applicant list
2. **Search Box** – type the name of the applicant in the Search box and hit enter to find a specific applicant

3. **Change Columns** – use this to customize your view of the applicant grid. Click Change Columns and check the boxes to determine that to display on your screen. Click Save when done to save your selection. You may change this at any time.

4. **Download Applicant Data** – this is a useful tool to create lists; 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.

5. **Filter Panel** – use this to fine tune your list of applicants for viewing

6. **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.

7. **Hide/Unhide** – 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. When you hide an application, it’s hidden from everyone else too.

8. **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.

9. **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.

10. **Email Applicants** – use a template to compose a single message to send to one or more applicants. Only Analysts, Chairs and Editors have this tool. To do this:
   - 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.
   - Then click “Send Bulk Email” in the row at the top of the list of names.
   - A template opens. 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. To personalize the template, you may insert variables into the subject line or message body, for example: {ApplicantName}, {Username}, {ApplicantCompletedDate}, {RecruitmentName}, etc.
   - Click Preview Mail.
   - Click Send Email when ready. This action is immediately noted in the applicant’s log.

11. **Applicant Log** – this is a record of time-stamped activity per applicant

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**D. Managing Applicants**

1. **To View** *(page 39, AP Recruit User Guide)*
Make sure you are viewing the entire pool. **Click on Entire Pool.** This will display all
applicants. (Committee reviewers will see only completed applicants).
Click on the applicant’s name to access his/her documents.
There are 3 different ways to view the documents:

a. **Download PDF Bundle** – this option downloads a PDF bundle of all an applicant’s documents, including a cover letter, watermarks, and pages in between each document.

![Download PDF Bundle](image)

b. **Download Link** – this option downloads a single document. Click on the hyperlinked filename to download the document to your computer.

![Cover Letter](image)  

**Note:** 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.

2. **Managing an Applicant’s Documents** (pages 43-46, AP Recruit User Guide)
Analysts, Editors, and Chairs may manage applicant’s documents. Click “Manage” beneath an applicant’s name and the application’s Overview screen opens:

![Manage](image)

Let’s say an applicant needs to send in materials by regular U.S. mail and now the documents must to be uploaded into Recruit. This would require that you scan in the
documents beforehand and save them as PDFs.
- Return to the list of applicants.
- Look in the Status column and find any applicant with the status, **Not Completed**.
- Below the name, click **Manage**.
- Inside the application, move to the section **Documents and References**.
- Below Curriculum Vitae, click **Upload**.
- Click **Choose File** and upload any sample PDF file on your computer.
- Click **Done** to return to the list of applicants.

**Note:** The applicant’s log will record this action. If this was the last requirement needed, the status of the application will automatically change to **Complete**.

3. **Documents and References**
Analysts, chairs, and editors all have the ability to manage the applications.
   a. **Documents** – click the hyperlinked filename to download them to your computer. You can also Upload documents received outside of the system or Delete an applicant’s document from their application. All these actions are logged in the system and time-stamped.
   b. **References** – recall when your recruitment was configured, references requirements were set-up. 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”.
      - To Upload a letter if the file arrives outside of AP Recruit, click **Upload Letter Document**
      - To Send a Request, add the reference using the Add Reference button and then click the Send Letter Request. An editable email template will be displayed for the user to customize.

   - To Delete a letter, click on Delete under the reference’s name. A confirmation/warning message will be displayed.
4. **Comments and Flags** (page 47, AP Recruit User Guide)
   a. Flags – these are intended to be a unique set of labels applied to applicants to help categorize them. To flag an applicant, type a descriptor. Remember to click the button, Add Flag. Analysts, Committee Chairs, and Editors can view this information. Use the checkbox if you wish to hide the flag from reviewers. [AT UCR: The Flag field may be used to rank candidates.]
   b. Comments – Comments should be written as considerately as words spoken in face-to-face meetings. Analysts, Committee Chairs, Editors, and Committee Reviewers may always view one another’s comments.

5. **Update Applicant Status** (pages 42, AP Recruit User Guide)
   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:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cornell</td>
<td>The applicant has accepted offer of employment; no further offers will be made to this applicant</td>
</tr>
<tr>
<td>PhD inst</td>
<td>Declined offer</td>
</tr>
<tr>
<td>Jan 16, 20</td>
<td></td>
</tr>
</tbody>
</table>

a. Find the applicant in the list and click the “Manage” link:
b. Click the **Update status** button at the top of the application:
c. Recruit suggests the next logical status:
d. Or click “Choose another status...” and select a status from the 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.

![Image of status update interface]

Which status is considered “shortlisted?” Shortlist consists of all statuses beyond Serious
consideration. Those include: Invite for interview, Interviewed, Selected candidate, Offered, Accepted offer, Declined offer, Hired, Withdrawn, and Campus declined. Serious consideration is NOT a shortlist status.

6. **Manually Add an Applicant** *(pages 37-38, AP Recruit User Guide)*

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. To do this:

   a. Locate the recruitment’s list of applicants.
   b. Click the button, Add Applicant located on the horizontal bar at the top of the list.
   c. Fill in the form: Applicant’s contact information, degree information, current employment, etc.
   d. 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.
   e. 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.

   a. At the top of the applicant’s screen, click the link, Activate Now.
   b. Look over the applicant’s information and click the button, Activate applicant access.
   c. Before the email is sent, verify the email address for the applicant is correct.

7. **Schedule a Visit or Seminar** *(pages 47-49, AP Recruit User Guide)*

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. To do this:

   a. Under the Manage link, click on Visit/Seminar.
b. In the form that follows, add a title, summary, bio of the applicant, and the main event date and click Next.

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

d. 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.


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

Fill in the form and Save Changes. When multiple title codes have been assigned to the recruitment, you will be able to select the title code to associate with the applicant. If the recruitment was cross-listed between departments, you will be able to select the main department to associate with the applicant.
The offer information is editable from the applicant’s information section under Manage applicant:

PART II – REPORTING

A. Disposition Reasons (pages 40-41, AP Recruit User Guide)
   Disposition reasons are an important component of the final Search Report and reasons must be assigned to ALL QUALIFIED applicants. Before finalizing or submitting a Short List Report, assign reasons why applicants did not move forward in the hiring process.

   To assign disposition reasons for Qualified applicants, click the tab marked Qualified. This displays all applicants that have been marked as "Meets basic qualifications."

   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.

   You can assign reasons individually or in bulk.
   - To assign individually, 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.
To assign in bulk, click the Edit Disposition Reasons for Selected Applicants button at the top of the assignment screen. 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.

B. **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. See Update Applicant Status Offer Proposal above for more information on updating status and entering proposal information.

C. **Diversity Analysis Reports**

Analysts may create two types of diversity analysis reports and solicit approvals.

1. **Applicant Pool Report** – this 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.

2. **Shortlist Report** – this 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.

D. **Creating the Reports (pages 50-52, AP Recruit User Guide)**

1. How to create the reports:
   - From the main Recruitment page, locate the recruitment and click the link, *Reports*. Or click the Reports tab from the Search info screen.
On the Reports screen, click the type of report you wish to create.
Click Preview to see the report before creating it. Make any changes necessary.
Click the button to create the report you need.

A summary appears. Click Create Report when ready.
A success message confirms the report has been created.
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.

2. How to update the reports: Let’s say an 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. To do this:
First, gather any documents and make all necessary changes to correct the report.
On the Reports screen, click the Applicant Pool or Shortlist section.
Click the corresponding button to create the new report. The new report will appear in the Date Generated column.
To replace report already in transit with the corrected report, click the link “Update approval.”
Choose the replacement report from the drop-down menu.
Add a reason for the update.
Click Yes, update report.

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.

E. Diversity Reports Approvals (pages 52-54, AP Recruit User Guide)
Submit an APPLICANT POOL REPORT or SHORTLIST REPORT for review at different points of the search. To do this:
On the Reports screen, click Applicant Pool or Shortlist.

- Find the report in the Date Generated column and click the link, “Submit as new approval.”
- A system-assigned workflow containing a list of approver’s roles in a progression will be displayed. If you think this workflow is incorrect, stop here and report this by sending an email to aprecruit@ucr.edu. Otherwise, click, Yes, submit for approval.

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.

For more information on the Short List Review and Notification process, click this link:

**PART III – INACTIVATE THE RECRUITMENT**

The search is complete when a candidate has been hired. At this point, analysts may archive the recruitment, which is accomplished by inactivating it. This effectively removes the entire recruitment plus the applicants and files from all reviewers. As Analysts, you can always re-activate. **Note: Inactivate the recruitment only after the Search Report has been created and approved.** See Search Report Checklist and User Guide.

1. Return to the Recruitments page by clicking Recruitments in the top menu bar.
2. Find the recruitment that you wish to inactivate
3. Click **Make Inactive** in the Actions column.

**PART IV – RESOURCES**

**A. Websites**

1. AP Recruit Production site: https://aprecruit.ucr.edu/
2. AP Recruit Training site: https://aprecruit.ucr.edu:48918/
3. AP Recruit Information: http://cnc.ucr.edu/aprecruit/
4. UCI Project Site and Recruit Updates: http://sites.uci.edu/ucrecruit/about-recruit/
B. Contact Information
   i. College/School/Unit: [http://cnc.ucr.edu/aprecruit/contacts.html](http://cnc.ucr.edu/aprecruit/contacts.html)
   ii. Academic Personnel Office: Antonette Toney, Sara Umali, Theresa Wimbley – aprecruit@ucr.edu
   iii. Office of Faculty and Staff Affirmative Action: Erica Jiang, Brittnee Agosto – affirmativeaction@ucr.edu

C. UCR Recruitment Guidelines
   i. Academic Hiring Toolkit
   ii. Affirmative Action Recruitment Guidelines
   iii. Search Committee Guidelines and Checklist

D. AP Recruit User Guides
   i. AP Recruit Training Page: [http://cnc.ucr.edu/aprecruit/training.html](http://cnc.ucr.edu/aprecruit/training.html)

Thank you for using the AP Recruit system. If you have any questions, please contact your College/School/Unit Recruit Analyst ([http://cnc.ucr.edu/aprecruit/contacts.html](http://cnc.ucr.edu/aprecruit/contacts.html)) or the AP Recruit support team at aprecruit@ucr.edu.