ABOUT AP 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.

AP 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. AP 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 8.1+ or 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 AP Recruit

To access AP-Recruit you must have a UCR NetID, UCR’s authentication system for the campus community. The UCR NetID is assigned to Faculty and Staff when they enter the payroll system, however it must first be activated. If you have never activated your UCR NetID, instructions are available at http://cnc.ucr.edu/NetID/obtaining.html

You also need to have an assigned “role” in Recruit, which will determine what access level you have and what actions you can take. If you log in and only see News & Updates, you have not been assigned a role and should contact aprecruit@ucr.edu for help.

If you have an activated UCR NetID, log into to Recruit here: https://aprecruit.ucr.edu/
A link to Recruit is also available on UCR AP Recruit website: http://cnc.ucr.edu/aprecruit/
All trainees will be using Recruit’s training site at: https://aprecruit.ucr.edu/training

1. Click on “UC Irvine Faculty & Administrators.”
2. When prompted, authenticate with your UCR NetID 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 AP Recruit by looking to the right on the menu bar. This is also how users log out of the system:

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

User Roles in AP 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 AP 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. [At UCR: This is assigned to the Affirmative Action Compliance Officer (AACO)]

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 role is often a step in the approval workflow for Search Plans and the reports. These senior level faculty members have viewing rights to completed applications for a given recruitment and can preview or create Applicant Pool, Shortlist, and Search Reports and have access to the applicants’ self-reported gender, race, veteran’s status and disability status.

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

Diversity Analysts roles are generally assigned to administrators who oversee the campus equity and fair hiring practices. When assigned to the AP Recruit tool, they have viewing rights to view completed applications for all recruitments across the campus. Diversity Analysts can preview or create Applicant Pool, Shortlist, and Search Reports and have access to the applicants’ self-reported gender, race, veteran’s status and disability status.

Trainer is a role that gives permission to create fake recruitments for use in the AP 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 AP Recruit and are the people responsible for overseeing the Search Plan, Applicant Pool Reports, Shortlist Reports, and Search Reports. Approvers are either system-assigned or assigned by analysts on a recruitment-by-recruitment basis. The following approver steps may assigned to a particular workflow: Committee Chair, Faculty Principal Investigator, Affirmative Action Reviewer, Department Chair, Unit Director, Equity Advisor, Dean’s Analyst, Dean, University Librarian, Diversity Office, Diversity Office Director, Academic Personnel, Academic Personnel Director, Academic Senate, Budget Office, Vice Provost, Provost, Executive Vice Chancellor, Chancellor. [At UCR: The Recruit Administrator will pre-assign an approval workflow.]

Approver – Final Authority for Search Waivers Only. The very last required person listed in the workflow is the final authority and will ultimately make the final decision on the search waiver request. This approver has the ability to approve the search waiver or decline it.
# Table of Contents

How To Use This Manual .................................................................................. 2  
What You Need to Know Before You Start ....................................................... 2  
  Operating Systems & Browsers ................................................................ 2  
  How to Log Into AP Recruit .................................................................... 2  
  User Roles in AP Recruit ......................................................................... 3  

**Part 1: Recruitment Management** .................................................................. 8  
Create the Basic Recruitment ......................................................................... 8  
  Open/Closed/Final Recruitments vs. Pool Recruitments ............................. 9  
  Title Codes and Availability Data ............................................................... 10  
Configure the Recruitment for Online Applications ..................................... 12  
Find and View Recruitments ......................................................................... 14  
Working with the Search Plan ...................................................................... 15  
Search Plan Approvals .................................................................................. 25  
  Submit the Plan for Approvals ................................................................. 25  
  Monitor Approvals In Progress ................................................................. 28  
Publish the Approved Plan ............................................................................ 28  
  To Unpublish a Recruitment ................................................................... 29  
Editing the Recruitment ............................................................................... 29  
  Editing an Approved Plan ....................................................................... 29  
  Editing a Published Recruitment ............................................................. 29  
  Special Editing: Adding Review Dates ..................................................... 29  
  Special Editing: Cross-listing Recruitments ............................................. 30  
  Special Editing: Changing the Recruitment Submission Type .................. 31  
  Special Editing: Editing Documents (after applicants have applied) .......... 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 ........................................................................... 36  
Basic Qualifications ...................................................................................... 38  
Disposition Reasons ..................................................................................... 40  
Statuses and Short-listing .............................................................................. 41  
  Updating Applicants’ Statuses ................................................................. 41  
  Proposed Offers ......................................................................................... 42  
  Decline Reasons ........................................................................................ 42  
  Withdrawn Statuses .................................................................................. 43  
Managing Applications .................................................................................. 43  
  Update Personal Information ................................................................... 43  
  Adjusting Applicant’s Specializations Choices ........................................ 44  
  Managing Applicant’s Documents ............................................................. 44  
  Replacing a Document ............................................................................. 45  
  Removing a Document .............................................................................. 46  
  Add a Document ........................................................................................ 46  
  Managing an Applicant’s References & Letters ........................................ 47  
  Add a New Reference ................................................................................. 47  
  Delete a New Reference ............................................................................. 48  
  Request a Letter from a Reference ............................................................ 48  
  Upload a Reference Letter Directly ........................................................... 48  
  Delete a Letter ............................................................................................ 49  
  Comments and Flags Management ........................................................... 49  
  Scheduling/Managing a Visit ..................................................................... 50  
  Managing Offer Details ............................................................................. 51  
  Other Manage Indicators ......................................................................... 51  


### Part 3: Reporting

Applicant Pool and Shortlist Reports
- The Applicant Pool Report
- The Shortlist Report
- Creating the Reports

Report Approvals
- Fixing Reports "In Flight"

Search Reports
- Search Report Components
- Creating Search Reports

Search Report Approvals
- Live-Updating

The End of the Search
- Inactivate the Recruitment
- To Re-activate a Recruitment

### Part 4: Search Waivers

View all Waivers
- Create a New Waiver
  - Position Information
  - Candidate Information
  - Appointment Information
  - Justification Information
  - Grant Information
  - Previous Waivers Information
  - Documentation Section
- Tools Section: Activity Log and Delete Waiver

Search Waiver Approvals
- Submit Waiver Request for Approval
  - Final Authority / Final Decision
- Locked Waivers
- The Waiver Conclusion

### Part 5: Exemptions

View all Exemptions
- Create a New Exemption
  - Position Section
  - Candidate Section
  - Appointment Section
  - Additional Details section
  - Documentation section
- Tools Section: Activity Log and Delete Exemption

Exemption Approvals
- Submit Exemption Request for Approvals
  - The Exemption Conclusion

### Appendix A

How Applicants Use AP Recruit
How References Use AP Recruit
How Approvers Use AP Recruit
How Committee Reviewers Use AP Recruit

### Appendix B

Notifications Sent to Applicants
Notifications Sent to References
Notifications Sent to Approvers
Notifications Sent to Analysts
Emails Sent To AP Recruit Support Staff

Supporting AP Recruit's End-Users

Appendix C

Special Tools for AP Recruit Administrators

Manage Users

Administrative Reports

UCOP Reports

Faculty Search Report

Recruitment and Retention Report

Applicant & Diversity Download Data
**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, etc. This simultaneously builds the survey on diversity, an important component of AP Recruit.

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

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

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

4. Fill in the basic information about the recruitment:

   - **Recruitment name**: The recruitment name should match the ad.
   - **Description**: The description appears to applicants on the corresponding apply page. Insert the full ad text. Include the Equal Employment Opportunity/Affirmative Action employer tag line (EEO/AA). 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 and InsideHigherEd.com. The Description field locks after the search plan is approved, keeping the analyst from changing the public face of the recruitment while still allowing Recruit Administrators to make updates if needed. [For UCR: See the PEVC and VPAP memo dated 3/20/15 for additional information that must be included in addition to the EEO tagline.]
- **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, Rank/Step, and Job location**: 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.

- **Optional Information Link**: Provide the URL if this recruitment is advertised on your school or department jobs website and AP Recruit will display the link to applicants when they apply.

### 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).

- **Open/Close/Final Recruitments** — Choose this for one-time searches that will complete when the vacant spot is successfully filled. All applicants will be received before any are reviewed. Applications are visible to the search committee as soon as they are complete. If no suitable applicants have been found, an administrator (not the analyst) can push the recruitment's close date to allow more applicants to apply.

- **Pool Recruitments** — Usually for full-time positions and positions with no specified closing date. Applications will be reviewed in order of receipt, and the search committee will review each application as they are received. The committee will then have the option to extend the closing date or stop reviewing applications if they feel they have sufficient candidates.
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. **Hint:** Push out your Open date to give the Search plan time to go through the approval process.
- 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 applicants are received in discreet windows bookended by review dates. Completed applications are visible to the search committee once a review date passes. Applicants will still be able to apply until the final date, but can only be reviewed if another review date is added by an analyst.

<table>
<thead>
<tr>
<th>Initial Review Date/Open Until Filled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open date: <strong>July 1, 2015</strong></td>
</tr>
<tr>
<td>Initial review date: <strong>Oct 31, 2015</strong></td>
</tr>
<tr>
<td>Final date: <strong>June 30, 2016</strong></td>
</tr>
</tbody>
</table>

Key features of Initial Review Dates/Open Until Filled:
- 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. **Hint:** Push out your Open date to give the Search plan time to go through the approval process.
- 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 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 Availability Data**

**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.

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

**Availability Data and Fields of study:** The data supplied here will be used with the Diversity Survey Reports, a core feature of AP Recruit. All applicant pools must be compared against the national availability data, which is associated via the fields of study.

Enter the fields of study that best fits your recruitment into the box. AP Recruit will display either the name or an alphabetically sorted list of those that match. The limit is capped at 40, however you will rarely need more than 5 fields of study. Click the ‘x’ to remove.

**Fields of study rollups:** Fields of study that contain smaller availability numbers are purposely rolled up into larger ones—so if you can’t find what you’re looking for, you must choose a more general category. Data sources are explained here:

**FYI: Data sources vary.**
- Fields of study beginning with “Campus” will use data derived from the NSF Survey of Earned Doctorates (NORC).
- Fields of study beginning with “Health Sciences” will use data derived from the Association of American Medical Colleges (AAMC).
- Fields of study 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).
Finally, look over the information for accuracy and click the **Save & Done** button.

**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.

**Configure the Recruitment for Online Applications**

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

**Documents Requirements.** Define the required or optional documents to be provided by the applicants. The applicants will see any description you decide to provide (204 characters limit).

**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 AP 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.

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

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

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.
- Approvers see all recruitments for which they’ve been named in a workflow for a Search Plan.

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

Tools to Find Recruitments

Use the toolbar at the top of the columns:

- **Create New Recruitment**
- **Change Columns**
- **Download as CSV**

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

**Download as CSV.** AP Recruit will create a comma-delimited file, “recruitments-yyyy-mm-dd.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 (see next page)**
Use the filter panel to fine-tune your list of recruitments:

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

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

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

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

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

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

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

**Working with the Search Plan**

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

**Details**

The Details section summarizes the recruitment. Committee chairs, editors, reviewers, and approvers can view this section but only analysts can edit it.
**URL for Applicants:** A unique URL for the recruitment is displayed in the status box at the top of the screen. Use this link for job ads, postings, electronic mailings, and links on other websites. Clicking the URL displays a preview of the recruitment. Applicants cannot access this page until the recruitment is published and the open date has arrived.

**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.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>When this recruitment plan is ready, submit it for approval.</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>Recruitment plan is under review. View approval request (0/2).</td>
</tr>
<tr>
<td>Ready to Publish</td>
<td>All approvers have approved. Publish now.</td>
</tr>
<tr>
<td>Pending</td>
<td>Recruitment has not yet opened.</td>
</tr>
<tr>
<td>Open</td>
<td>Applicants can now apply. Review current applicants.</td>
</tr>
<tr>
<td>Closed</td>
<td>Applicants are making final edits. Review current applicants.</td>
</tr>
<tr>
<td>Final</td>
<td>Applicants can no longer make changes. Review applicants.</td>
</tr>
<tr>
<td>Inactive</td>
<td>This recruitment is inactive. Make active.</td>
</tr>
</tbody>
</table>

**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:** Icons indicate whether the information is part of the search **Plan** or search **Report**. Roll over a badge with your mouse to reveal the helper text as shown here:
The Diversity section includes:

**Availability Data:** A table shows the recruitment's fields of study along with the corresponding national availability data that is provided via the UC Office of the President. **Note:** If the recruitment has multiple fields of study, the table will show an average that takes into account the number of individuals in each field. Fields of study with more individuals will have a bigger impact on the overall average than fields with fewer individuals.

**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 Equity Advisor will be named in this section. HOWEVER, the name will appear only if (1) a Recruit administrator has assigned the Equity Advisor role and (2) the recruitment is for a regular rank series-tenured/tenured track. Otherwise, this section will be blank.

**Equity advisor role:** Use this optional 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.
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**.

**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.

**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**.
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. Committee reviewers and named approvers can view this section. Analysts, committee chairs, and editors may view and edit the fields in this section.

The Qualifications section includes: Sections for Basic, Additional and Preferred qualifications. At the very minimum, fill in the Basic Qualifications.

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. What will the committee base their decisions on? Approvers and reviewers may see these fields but may not edit them.
The Selection Process section includes:

**Selection Criteria:** Provide a detailed description of the selection criteria to be used in evaluating candidates.

**Selection Plan:** Document the plan that the search committee will use to evaluate the applicants in order to select a shortlist and finalist (example: phone interviews, in-person interview, etc.)

**Specializations:** Create a custom list for applicants to match their area of study or expertise as they fill out their application. Applicants will be able to pick as many specializations as they desire, or they can choose to pick none. Reviewers will be able to find applicants by their specializations.

**Cut and Paste Specializations:** AP Recruit supports cut-and-paste of entire lists of specializations from other sources. Paste them in and click Add. Remember to Save changes.

**Committee**

This section is where analysts assign committee roles on a recruitment-by-recruitment basis so when the members log into AP Recruit, they will have the proper access to applicants. Any committee member and named approver 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. Analysts can use the “Edit” button to grant Reviewers disposition permissions. By granting this access, reviewers may take care of dispositioning applicants, a task that is usually reserved for the analyst, chair, or editor.

- **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

1. Click the **Add** button in the Core Committee part of the page.

2. Choose a role and then start entering the person’s first or last name, email address, or campus ID into the search box. Click the **Add** Button after selecting a role and a finding a user.

3. The name will be added beside the appropriate role on the page.
4. Click **Edit** beside the name to update the role or remove the member from the committee.
Setting up the Search Committee – Adding members in bulk

1. To add committee members using an extended search click the Add members button.

In this view, you can add faculty from entire Schools and Departments at once.

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

Documentation

This section is for archiving and retrieving various materials associated with the recruitment. Files must be uploaded as PDF, TXT, or images. Analysts, committee chairs and editors can view and edit express fields in this section. Committee reviewers and most named approvers can view the documentation section (but can’t edit).
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.

**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. [At UCR: See VPAP Memo 5/2015 regarding Interview Materials and Search Reports.]

**Disposition Reasons**

The Disposition Reasons section includes:

**The Disposition Reasons List**
This section displays the system’s default reasons used to assign to applicants and the ability to customize them. Disposition reasons justify why applicants didn’t move forward in the hiring process and is an important component of the final Search Report. Any committee member and named approver can see this section but only analysts may specify custom reasons.

Customize disposition reasons: Analysts may customize the lists if the default reasons do not meet their needs for a particular recruitment. Once the first applicant applies, the reasons are no longer customizable and a Recruit administrator must be contacted. [At UCR: Custom reason must be approved by EE/AA (formerly OFSAA). Contact affirmativeaction@ucr.edu for assistance.]

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

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

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

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

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

**Applicant Disposition Status Panel**
Analysts use this panel to see which applicants need disposition reasons before running a Search Report. Click on one of the links to be taken directly to the disposition reasons assignment page for those applicants who are missing reasons (or a comment). If you have complete applicants who have yet to be marked as Meets or Doesn’t Meet Basic Qualifications, there is a link for that as well.

**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.**”
2. Make a selection (Proposed candidate, Failed-no candidate, or Canceled). You may add notes about the outcome of the search.

3. AP Recruit will alert you if Proposed candidate is selected and if no candidates have been updated to a proposed status:

   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

4. You may clear the initial search outcome, for those occasions when you might have clicked the wrong button, or jumped the gun a bit. Click “Edit,” then “Clear.

**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**.

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. **[At UCR: The Recruit Administrators will pre-assign the approval workflow per college/school/unit.]**

3. Otherwise, click **Yes, submit for approval**.
4. The Plan Approval Request screen opens:

Specify person. Each step must have at least one specified person. In some cases, the system automatically assigns the person. [At UCR: Mandatory approvers are pre-assigned by the Administrators. Contact aprrecruit@ucr.edu if you need assistance.] For those steps not assigned:

1. Click the link, “Specify person.”

2. Enter the person’s email address or UCR NetID into the box.
3. Click Add.

Remove specified person. (example: “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.
   
   Note: Analysts cannot remove an users that were automatically assigned by the system.

Assign alternates. (example: “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. [At UCR: This may be assigned by the Recruit Analyst with the exception of EE/AA, APO & VPAP roles.]

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

2. Enter the person’s email address or UCR NetID into the box.
3. Click Add.

Augment steps with additional steps (example: “we also need the Principal Investigator’s vote”). At UCR: Diversity Office and APO roles cannot be modified. Contact aprrecruit@ucr.edu if you need assistance.]

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. (example: “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. [At UCR: Use the comments text box for search plans that require revision; do not approve the plan if it needs revision.]

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 AP 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.

3. Click “Send Email.”

Monitor Approvals In Progress

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

![Approvals Table]

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.

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

Don’t forget to publish. Unpublished recruitments mean that the recruitment will languish and you won’t receive any applicants.
To Unpublish a Recruitment

This flexibility built into AP Recruit allows an analyst to pull the recruitment back to a plan. Unpublishing does not remove any approvals so if changes are made, analysts may need to solicit re-approval offline. An Unpublish link appears at the top of the Details page and is available up until the first applicant applies.

**Editing the Recruitment**

**Editing an Approved Plan**

While some key fields are locked after the recruitment has been approved, other fields may be editable— and the PDF will be updated accordingly. But be advised, once a person has signed off on the plan, there is no re-approving it *in that role*. In other words, if your Dean has approved the plan and then you make a change to the dates or the requirements, 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 plan after approvals, please contact EE/AA at affirmativeaction@ucr.edu.*

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

- **Contact Information**
  - Customize how various parties can inquire about the recruitment.

- **Description**
  - Update this public-facing, important field.

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

- **Document Requirements**
  - Requirements are fully editable until applicants appear in system.

- **Reference Requirements**
  - Requirements are fully editable until applicants appear in system.

- **Internal Analyst Notes**
  - Add and edit any special notes.

**Special Editing: Adding Review Dates**

Remember, completed applications are visible to the search committee in discreet windows bookended by review dates. Now that your **initial review date** has passed, you need to add another review date.
On the Details page, click the inline Edit button beside Dates.

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.

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 AP 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.

Special Editing: Cross-listing Recruitments

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

- The recruitment can only be managed by the analyst of the home department. Analysts from cross-listed units will not have analyst access.
- The recruitment is displayed beneath the name of the home department and also beneath the cross-listed unit(s) on AP Recruit’s Apply page.
- The applicant’s dashboard displays the name of the home department and also the cross-listed unit(s).
- Once a candidate is proposed, AP Recruit’s Offer Proposal Form lists each unit for the analyst to indicate the allotment of salaried time.

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. You may add as many as needed. 
   *Note: If the list doesn't show the unit you wish to cross-list, contact AP Recruit Support for assistance.*

![Drop-down list of unit names](image)

6. Click “Save Changes.”

**Save changes**

### Special Editing: 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.

   ![Inline Edit button](image)

2. 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](image)

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

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

### Special Editing: Editing Documents (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 AP Recruit's built-in email notification to alert existing applicants about the change.

1. Return to the Details section of the recruitment.
2. 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](image)
3. Scroll to the bottom of the edit form and click “Add another optional document.”

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

5. Click “Add notification message.” To see a sample of the notification, visit the Help Docs by clicking the link, “View notification example.”
6. Compose your message in the box provided and click the button, “Notify applicants.”
7. Click “Save Changes.”

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.

AP 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.

- **Specializations**: Use the check boxes to display applicants on the applicant grid based on their self-selected specializations. All applicants are displayed by default, including those who have not selected any specializations.

**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. When an applicant is manually completed (or reverted back again).
6. When an applicant is purposely hidden (or unhidden) by the analyst, chair, or editor.

**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. AP 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 sparingly. 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.

The left filter panel indicates the number of hidden applicants.

Roll over the visual indicator beside the applicant’s name to remind you the applicant is hidden.

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.
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.:

   ![Add Applicant Form]

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**.

   ![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**.

   ![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]

   Notifying the applicant that an application has been submitted in their behalf sends the login information and Survey instructions.
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 accurate reporting 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 EE/AA at affirmativeaction@ucr.edu 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.

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**.

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

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

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

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

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

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

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

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

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

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

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

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

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.

**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 **Edit disposition reasons for selected applicants** 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.
_statuses and short-listing

It is imperative that an applicant’s status be kept up to date and is current. This ensures that the data is accurate at any stage of the recruitment, which is critical for approvers of reports as well as ensuring the campus is accurately represented in system wide reporting. Update statuses in real time, rather than wait to make the updates when a recruitment is near completion. Then, when a recruitment is near completion, a final candidate should be marked and identified in the recruitment as “Offered”, “Hired, or “Declined” as well as reasons for declining a recruitment offer.

updating applicants’ statuses

1. From any applicant list (Qualified, Unqualified, or the Entire Pool view), click the link in the status column belonging to the applicant. **Note: the Status column is on by default, but if it’s missing, add it with the “Change Columns” button.**

For a definition of the status, roll your mouse over the help icon. Then click directly on the status.

2. Or, click the applicant’s name. The review screen reveals their current status. Click on the status.

3. The Update status form opens. Make a selection and click **Update status.**

**Note:** Statuses are selectable only in a forward-moving progression. If a mistake has been made and you wish to roll back, contact a Recruit administrator to unlock the statuses.

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.
Proposed Offers

When updating to Offered, Accepted Offer, or Hired, you may add offer information:

- The department name will auto-fill. But if the recruitment is cross-listed, use the drop-down menu to select the correct unit to associate with the appointment.
- The title code will auto-fill. But if multiple title codes have been assigned to the recruitment, use the drop-down menu to select the title code to associate with the appointment.
- Fill in the other fields (Step, %time, Start date, Salary, Discipline).
- If offers have multiple appointments — for example 50% Full Professor of Physics / 50% Associate Professor of Statistics — then click the link, “Add another appointment.” And complete the section.

When satisfied with the information entered, click Update status. The offer information is editable by returning to update the status.

Decline Reasons

Sometimes a shortlisted candidate backs out. When updating an applicant from Proposed Candidate, Offered, or Accepted Offer to Declined or Withdrawn, choose a reason from the list provided.
Withdrawn Statuses

Sometimes applicants want to remove themselves from consideration. When this is the case, update the status to “Withdrawn.” If the applicant withdraws when they’re already on the shortlist, they will remain on the shortlist. If the applicant withdraws after they’ve been selected (Proposed, Offered, Accepted offer), the analyst must specify the reason(s) why.

Managing Applications

Only analysts, chairs, and editors have read/write access to manage the applicant’s records.

- Inline edit buttons on the applicant’s review page are used to edit the related information.
- All changes are tracked in the applicant’s log.
- Changes are visible to the logged in applicant.

Accessing the applicant’s records

1. Locate the applicant in the list and click directly on the name.

2. Use the inline buttons on the applicant’s review page to edit the related information.

Update Personal Information

Update the applicant’s personal information such as name, username, contact information, degree and employment information, etc.

1. Move to the “About” section of the applicant’s review page.

2. Click the inline “Edit” button.

3. Make changes on the form and “Save Changes”.

Adjust the applicant’s address, email, username, employment and other information.

- Click the applicant’s name and locate the **About** section.
- Click the **Edit** button make necessary adjustments.

### Adjusting Applicant’s Specializations Choices

1. Move to the “Specialization” section of the applicant’s review page.  
   **Note:** This section won’t display if the recruitment doesn’t have designated specializations.

2. Click the inline “Edit” button.
3. Update the specialization areas selected by the applicant and “Save Changes”.

### Managing Applicant’s Documents
• The “Add” modal opens.
• By default, “Inside Recruit” is already selected. This means the uploaded document will be stored in AP Recruit and available to the search committee electronically.

![Add Document Modal](image)

**Replacing a Document**

1. Click the inline “Edit” button beside the name of the document you wish to replace.

   ![Documents Viewer](image)

2. Click Replace/Remove

   ![Curriculum Vitae](image)

3. Select a **Removal Strategy**. By default, "Replace file" is selected. **Note**: The “Replace” functionality will not disturb the application. The application will remain completed and in its current search window.

4. Now, verify the Document location. Choose “Outside Recruit” only to indicate if artwork, novels, videos, etc. have been received and are available to the search committee on request.

5. Browse for the file.
6. Optionally provide a description of the replaced file.
7. Click the button “Yes, delete the old file and replace it with the new one”
Removing a Document

To delete an applicant's document completely, use the "remove" strategy.

**Note:** Removing a required document (such as a required CV) from a completed application will mark the applicant "Incomplete." Incomplete applications are hidden from committees. If there are review dates, this will push the applicant into the later review window, potentially jeopardizing their standing with committee reviews.

- Long-listed applicants (Seriously considered) and shortlisted applicants will not be disturbed. In other words, it's safe to delete a file without jeopardizing their shortlist status or review window position.
- Manually-completed applicants also will not be disturbed when removing required files.

1. Click the **Remove file** button.
2. Read the warning!

   *The warning on the left is shown anytime you're removing an applicant’s file. The warning on the right is shown when removing a file will jeopardize the applicant’s standing in their review window.*

Add a Document

1. Click the “Add” button beside the missing document.
2. The "add document" modal opens. The document location is preselected to "Inside Recruit." Choose “Outside Recruit” only to indicate if artwork, novels, videos, etc. have been received and are available to the search committee on request.

3. Browse to the file on your computer. (Most documents will be uploaded as PDF files. But other valid file types include: zip, jpg, rar, tif, mov, bmp, 3gp, png, wmv, m4v, mp3, mp4, psd, swf, tiff.)

4. Provide a description of the document (this is optional)

5. Click the “Add” button to confirm the upload.

Managing an Applicant’s Reference & Letters

Reference requirements are always set to one of the following:

1. **None** (the applicant is not required to provide references)
2. **Only contact information** (The applicant must provide references’ names and addresses.)
3. **Letters of recommendation** (The applicant is required to provide references and they must notify their references that a letter of recommendation is needed.)

Department analysts, chairs, and editors have complete manage rights of the references and the letters of recommendation. 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”.

Add a New Reference

1. To add a new reference, use the “Manage” link located beneath the applicant’s name.

2. Move to the "Documents & References" page using the left hand nav bar.

3. In the References & Letters section, click the "Add reference button.

4. Provide the name of the reference, contact information, and any optional information and “Save.”
Delete a New Reference

Deleting a reference will turn a completed application incomplete, thereby hidden from reviewers. If there are letters associated with the reference, they will be removed permanently.

1. Delete a reference using the “Manage” link located beneath the applicant’s name. Move to the “Documents & References” page using the left hand nav bar. Choose “Delete.”

Request a Letter from a Reference

**Note:** When the requirement is "Letters of recommendation," the applicant makes the request as part of their application process. But when the requirement is for "Only contact information," then analysts, chairs, or editors may issue the request for letters.

1. Locate the applicant and click directly on the name.

2. Move to the References section and click the link, "Request letter."

3. An email template opens. The message body and signature fields are editable. Expand the links to reveal the embedded Log In information or Confidentiality Statement.

4. When you are ready, click “Send request.”

**The Confidentiality Statement:** At the time of letter-upload, References are required to digitally certify that they have read the University of California’s statement specifying the degree of confidentiality before the file is accepted

“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.”
Upload a Reference Letter Directly

If a letter arrives via email or snail mail, the file may be uploaded into the references section. Remember to thank the letter-writer and include the Confidentiality Statement.

1. In the References section, click the link, “Upload letter” beside the name of the reference.
2. Browse for the file on your computer. Upload only PDFs or supported media file types.

Delete a Letter

1. In the References section, click the link, “Delete letter.”
2. Click “Yes, delete letter” to confirm.

Note: Deleting a letter has no bearing on the completion of the application. Another letter may be uploaded in its place.

Comments and Flags Management

Functionality for managing flags is available from the “Manage” link below the name of the applicant.

Flags. Flags are intended to be a unique set of labels applied to applicants to help categorize them. You may edit or delete someone else’s flag with the Edit | Remove links. [At UCR: The Flag field may be used to rank candidates.]

Comments. Comments are displayed publically to the entire search committee. If someone’s comment is inappropriate, contact the owner outside of the system and ask them to delete it.
Scheduling/Managing a Visit

The visit/seminar feature is an amenity in Recruit. Schedule one main event for any shortlisted applicant. Schedule multiple events that are associated with the main visit. The information is displayed to reviewers.

1. Click any shortlisted applicant’s name and locate the Visit/Seminar section on their review screen.
2. Click the link, “Schedule a visit or seminar.”

3. Enter a title, main event date, a summary, and candidate’s bio into the form.

4. When finished, click “Schedule visit.”
5. To schedule additional events associated with the main visit, click the button, “Add event.”

6. Enter the event title, location, and time into the form.

7. Click “Add event” when done.
Managing Offer Details

The Proposed offer panel displays only for shortlisted applicants that have an offer proposal. For more information about adding the offer proposal, see the section, “Statuses and Short-listing” in this user guide.

To edit the details of an existing offer, click the “Edit offer” button and make any desired changes.

Other Manage Indicators

Hidden applicant indicator
Learn more about hiding an applicant in the section, “Tools to Use with the Applicant List”

Applicant added indicator
Learn more in the section, “Manually Add an Applicant”
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 workflow list. Typically Department analysts create the reports and submit them for approvals. However, central campus Diversity Analysts, and campus Equity Advisors may also preview or even create reports for their own use. The central campus Diversity Analyst 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 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 report approvers will have access to all information on this report.

See samples of both the Applicant Pool Report and the Shortlist Report 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.
6. A summary appears. Click *Create Report* when ready.  

**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 AP Recruit:

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

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.
The minority total includes individuals who self-reported multiple race/ethnicity. Therefore: Minority=AfAm+Hisp+Asian+NaAm+Mult.

**The average takes into account the number of individuals in each Field of study, so a Field of study with many individuals will have a bigger impact on the overall average than a Field of study with fewer individuals.**
Report Approvals

Submit APPLICANT POOL REPORTS and SHORTLIST REPORTS for review by designated approvers.

1. Move to the Applicant Pool or Shortlist section.

2. Saved reports are listed by the date/time they were generated. Click the link, “Submit as new approval.”

3. A confirmation box opens with 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. [At UCR, there is a pre-assigned approval workflow. Contact aprecruit@ucr.edu if you need assistance.]

4. Make sure all roles are assigned names of people in those roles. If not, specify a person. [At UCR: Mandatory approvers are pre-assigned by the Administrators.]

5. Add any additional steps or alternate approvers if needed. [At UCR: This may be assigned by the Recruit Analyst with the exception of EE/AA, APO & VPAP roles.]

*The Comments section is for approvers but you may also use comments if you need to communicate with your approvers.

Automatic Approver Emails: At each step, AP 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 AP Recruit detects an approval, the next in line is notified.
• After the last step approves, AP 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 AP Recruit” and Appendix B, “Notifications Sent to Approvers.”

Fixing Reports “In Flight”

Scenario: The analyst has submitted an Applicant Pool or Shortlist report for approval but an approver along the way finds a mistake. The analyst can correct the report, replace the current version and pick up where it was left off in the approval workflow.

1. First, 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 a new report.

4. The new report is added to the list, distinguished by the date/time it was generated. To replace report already in transit with the corrected report, click the link “Update approval” BESIDE THE ORIGINAL REPORT.

5. Select your replacement report from the drop-down menu, identified by the date/time it was generated.
6. Note a reason for the update in the box provided.
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.

When an Applicant pool report or Shortlist report is updated, the activity is logged within the comments section on the report’s approval screen. The helpful notation indicates that the report was updated along with a link to the previous report.

Search Reports

Search Report Components

[At UCR: A Search Report is required to be submitted for review and approval 30 calendar days after a search is completed (hire is finalized, search is cancelled or search has failed). Search Plans for the following Academic Year will not be processed for approval until all previous years (14-15AY or later) completed recruitments have an approved Search Report on file and have been made inactive. For additional information, refer to AP Recruit Training: (1) Search Report Guidelines and (2) Search Report Checklist and User Guide. For a copy of the VPAP’s memo regarding Search Report Requirements, click here: http://cnc.ucr.edu/aprecruit/vpap_memo_regarding_aprecruit_search_report_requirements.pdf]

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:** What efforts were actually made to reach groups that are underutilized/underrepresented minorities, women, protected veterans, and individuals with disabilities? Committees may have added to their original plan during the search. This field is required information on all Search Reports.
8. **Applicant Disposition Reasons:** All applicants marked Qualified and Unqualified must have disposition reasons. Analysts will be prompted to enter this information before creating a Search Report.

**Creating Search Reports**

1. Click the *Reports* tab from the Search Info screen or from the top of the list of applicants.

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

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


5. Before creating a Search Report, AP Recruit reminds you if there is any missing information. See previous section, “Search Report Components.” Follow the corresponding “Add Now” links to reach the data fields and provide the missing information.

6. Then return to the *Create New Search Report* button and try again.

7. You’ll be prompted to title the report.

   *Hint:* Some analysts title their reports with the name of the applicant who will be hired, though this is just a suggestion. Title your report anything that makes tracking easier for you.

8. If your recruitment has review dates, select the review date window you wish to show for this report.
9. If any applicants are missing disposition reasons, AP Recruit reminds you. So click on the link to return to the disposition status panel and assign them to the applicants.

10. When you see an active button, **Create Search Report**, your report is ready to generate. Click the button and Search report will appear in your listing as the **Current Report**.

### Search Report Approvals

*Submitting Search reports for approvals follows the same process as submitting Applicant pool and Shortlist reports.*

#### Live-Updating

Search reports update **in real time**. This means you can make changes to the information contained in the Search report and the approvers will see those changes as soon as they happen. When the last approver signs off, AP Recruit snapshots the PDF so if you want to run another Search Report or make other changes, you can do so, and the PDF will still be around to see what was approved.

1. Update any of the components of the report as needed.
2. Then return to the Search reports screen and click **Search Report** from the reports menu.

3. Click **Preview** and you’ll see your changes will be evident.

4. Optional: Consider sending an FYI about the change to the approvers. Click **Notify Approvers** and type a message to email them.

### Review Date Changes on Search Reports

If the wrong review date window was selected when you created the Search report, you may change it until the final approval is received. The report’s name may also be retitled in this way.
1. Find the report in the listing.
2. Click the **Edit** button beside it. (The button is available only when approvals are pending)

![Edit button with pending approvals](image)

3. The Edit Search report screen opens.
4. Use the drop-down menu and pick the correct review date and **Save**.

![Edit search report screen](image)

5. Optional: Consider sending an FYI about the change to the approvers. Click Notify Approvers and type a message to email them.

### 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.

![Recruitments menu](image)

2. Click the link, “Make inactive”:

![Make Inactive link](image)

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.
Part 4: Search Waivers

Departments occasionally have a need to hire candidates and bypass the normal search process. Generally the person is being hired because of their skills, as a spouse to someone already recruited through an open recruitment, as a PI with their own salary funding, as a remarkable individual (Nobel Laureate), as an urgent need fill, or as a UC Presidential Post Doc Fellow.

AP Recruit lets analysts create search waivers, providing a variety of information. Analysts are then able to submit the waiver request for approval (much like search plans/search reports/etc.). Afterwards, a "final authority" can approve or decline the request.

Waivers will only be approved in certain circumstances. Please contact your central office of diversity for waiver guidelines. Search waivers that do not comply with the guidelines will not be approved. Submission of a waiver request does not guarantee approval.

View all Waivers

Department Analysts see all waivers created under their department name. School Analysts see all waivers created in every department within their school. Approvers see all waivers they have been named to approve.

1. Click Waivers in the top menu bar.

2. The waivers page opens.

3. From newest to oldest, all waivers that you have access to will be listed in a grid view.
   - Department analysts see all waivers created under their department name.
   - School analysts see all waivers created in every department within their school.
   - Approvers see all waivers they have been named to approve.

4. Search waivers are associated with a unique search waiver request number (SWR).
   **Note:** While the SWR# relates to a single candidate, a candidate could potentially have more than one waiver in the system.

5. Adjust the grid information or narrow the list using any of the following tools:
   - Click the "Change Columns" button and specify column criteria.

   - Zero in on a waiver using a search term. Examples: search by SWR#, candidate name, position working title, or home department.
   - Check the boxes in the filter panel to filter by Academic Year, by Open/Concluded, or by Active/Deleted. Click the "Filter" button to activate the filter and "Reset" to remove the filter.
Create a New Waiver

1. Click **Waivers** in the top menu bar.
2. Click the button, **Create New Search Waiver**.

3. Gather all necessary information to process the waiver request. The following is a list of the informational fields needed to process a waiver request:

<table>
<thead>
<tr>
<th>Position Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position working title</td>
<td>This is the name of the waiver in the system. This field can't be blank.</td>
</tr>
<tr>
<td>Home department</td>
<td>This department will manage the waiver process. This field can't be blank.</td>
</tr>
<tr>
<td>Academic Year</td>
<td>This is the year that the waiver request was initiated and is required in order to begin the waiver request. This field can't be blank.</td>
</tr>
<tr>
<td>Position Duties</td>
<td>If known, describe the duties of the position, along with any associated areas of responsibility. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td>Affirmative Action goal</td>
<td>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. This field is required before submitting the waiver for approval.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Candidate Information</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate name</td>
<td>Place the name of the candidate in this field. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td>CV</td>
<td>Browse and upload the candidate's CV. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td>Candidate currently employed by the university?</td>
<td>Select “Yes” if the candidate is currently employed by the university. Select No if they are not. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td>Current employee ID</td>
<td>If “Yes” currently employed, provide the employee ID. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td>Effective date of initial appointment to current position</td>
<td>If “Yes” currently employed, enter the effective date of the appointment. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td>Current appointment Department</td>
<td>If “Yes” currently employed, select the department. This field can't be blank.</td>
</tr>
<tr>
<td>Title, Step, Percent time, current appointment start date and end date</td>
<td>If “Yes” currently employed, supply this information about the current appointment.</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Candidate qualifications</td>
<td>Discuss the qualifications required to successfully fill the position, and how the candidate meets those qualifications.</td>
</tr>
<tr>
<td><strong>Appointment Information</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Proposed appointment</td>
<td>Only add the appointments for which the search waiver is being requested. Appointments that do not require a search waiver should not be added. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td>Department</td>
<td>Select department to which the candidate will be appointed. This field can't be blank.</td>
</tr>
<tr>
<td>Title</td>
<td>Select one title code from the list. This field can't be blank.</td>
</tr>
<tr>
<td>Step</td>
<td>Provide a step for this appointment.</td>
</tr>
<tr>
<td>Percent time</td>
<td>Enter the percent of time for this appointment.</td>
</tr>
<tr>
<td>Proposed appointment start date</td>
<td>Enter the start date for this appointment.</td>
</tr>
<tr>
<td>Proposed appointment end date</td>
<td>Enter the end date for this appointment.</td>
</tr>
<tr>
<td>Add another appointment</td>
<td>Use this link to add another appointment.</td>
</tr>
<tr>
<td><strong>Justification Information</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Category</td>
<td>Categorize the type of waiver by selecting from the corresponding menu. The choices are divided by Senate Faculty vs. Non Senate Faculty and Other Academics. Choose “Other” if an option doesn't appear in the menu and explain using the free text field. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td><strong>Grant Information</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>Funding agency</td>
<td>Add the name of the grant funding agency.</td>
</tr>
<tr>
<td>Grant number</td>
<td>Add the grant number.</td>
</tr>
<tr>
<td>Salary from grant</td>
<td>Add the salary that was awarded from the grant.</td>
</tr>
<tr>
<td>Percent time working on grant</td>
<td>Add the % time the candidate worked on the grant.</td>
</tr>
</tbody>
</table>

*Note: The fields for grant information display only when the category is Non Senate Faculty and Other Academics PI/Co-PI/Leadership Status.*
<table>
<thead>
<tr>
<th><strong>Grant documentation</strong></th>
<th>Add the grant documentation. The uploaded files will be appended to the PDF and visible to the approvers. Files must be uploaded as .pdf, .txt, or images.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Justification narrative</strong></td>
<td>Provide a narrative explanation detailing the reasons for the search waiver, and include details about why it is not possible to conduct an open search for the position. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td><strong>Waiver duration</strong></td>
<td>How long is the waiver valid? Set an expiration date.</td>
</tr>
<tr>
<td><strong>Expiration type</strong></td>
<td>Select an appropriate expiration type based on whether the waiver will be Time-limited (temporary) or Permanent. Refer to the search waiver guidelines for more information about which types of waivers qualify for each expiration type.</td>
</tr>
<tr>
<td><strong>Expiration date</strong></td>
<td>For Time-limited types, type an expiration date or use the date selector. <strong>Note:</strong> If the appointment continues after the waiver expires, a new waiver will be required. This field is required before submitting the waiver for approval.</td>
</tr>
<tr>
<td><strong>Effective date</strong></td>
<td>Type a date or use the date selector. <strong>Note:</strong> The appointment may not start before the waiver effective date. This field is required before submitting the waiver for approval.</td>
</tr>
</tbody>
</table>

**Previous Waivers Information**

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Add previous waiver</strong></td>
</tr>
<tr>
<td><strong>Search waiver request (SRW) or other reference number</strong>.</td>
</tr>
<tr>
<td><strong>Candidate name</strong></td>
</tr>
<tr>
<td><strong>Position</strong></td>
</tr>
<tr>
<td><strong>Department</strong></td>
</tr>
<tr>
<td><strong>Search waiver category</strong></td>
</tr>
<tr>
<td><strong>Was the waiver approved?</strong></td>
</tr>
<tr>
<td><strong>Effective date</strong></td>
</tr>
<tr>
<td><strong>Expiration date</strong></td>
</tr>
<tr>
<td>Documentation Section</td>
</tr>
<tr>
<td>----------------------------</td>
</tr>
<tr>
<td>Supporting Documents</td>
</tr>
<tr>
<td>Description of uploaded file</td>
</tr>
<tr>
<td>Comment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tools Section: Activity Log and Delete Waiver</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity log</td>
<td>All users with access to the waiver may see this tracker, showing exactly when certain steps of the waiver process were completed and who was involved.</td>
</tr>
<tr>
<td>Delete waiver</td>
<td>In the event that a search waiver was created in error, analysts can delete their search waiver. Waivers can be deleted by analysts only if it has not already been submitted for approval. Once it has been submitted for approval, only a Recruit administrator is able to delete the waiver. Waivers cannot be undeleted, even by admins.</td>
</tr>
</tbody>
</table>

**Search Waiver Approvals**

Waiver approvals work similarly to the other types of approvals in AP Recruit.

- Approvers named in the workflow receive notification emails.
- Approvers may download the PDF, look it over, and leave a comment if they find deficient areas.
- PDFs are "live updating." This means that any changes made to the PDF while it is under review takes place in real time.
- If all approvers have approved the waiver, AP Recruit "snap-shots" the document for the electronic record.

*Note: Waivers will only be approved in certain circumstances. Please contact your Academic Personnel Office to review the search waiver guidelines before submission. Search waivers that do not comply with the guidelines will not be approved.*

1. Open the waiver by clicking anywhere on the waiver's row.
2. The status of a waiver is found at the top of its screen, marked by Draft, Pending, Approved, or Declined icons.

- Draft: The waiver hasn't been submitted for approval.
- Pending: The waiver has been submitted and is pending approval(s).
- Pending Final Decision: The waiver has been approved and is ready for the final decision.
- Approved: The waiver has been approved by all approvers named.
- Declined: The waiver has been declined by the final authority
3. The **Preview waiver request** button is available any time a new waiver is created and it opens the most recent version of the search waiver in a PDF. The “Draft” watermark diagonally showing across the document disappears once all approvers have voted.

### Submit Waiver Request for Approval

1. When you feel the search waiver is ready, click the link in the status bar, **Submit it for approval**.

2. If the waiver is incomplete, a checklist appears. Follow the corresponding "Add Now" links to reach the missing data fields and provide the missing information.

3. Try again! Return to the status bar and click the link again, **Submit it for approval**.

4. When the waiver is complete, a list of approver's steps appears.

5. Cancel if the workflow seems incorrect. Otherwise, click **Yes, submit for approval**.

6. The approval request screen opens.

### Specify Persons

As with all approvals, a name **must** be specified for each step, or the approval workflow will stall. In most cases, the system automatically takes care of this. For example, the Diversity Office may already be pre-populated with a person's name and maybe two (the second name is an alternate). For any step that is not labeled with a person's name, click the link, "Specify person" and add the person.

- **Specify person**

### Communicating with Approvers

**Add a comment:** Permanently attach a comment to this waiver request. Approvers will see your comment when they log in.

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

- The email includes a direct link to the approval screen where approvers may download the PDF, comment, and approve.
- As soon as AP Recruit detects an approval, the next in line is notified.
- After the last step approves, AP Recruit sends a notification to the submitter (analyst) 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. (examples: to prod the approver who’s taking too long, to warn the pending approvers about what’s coming their way, or to highlight a change that previous approvers might need to know about.)
Changing the Approval Workflow

It is possible for analysts to redesign the established workflow — but only until the final authority makes a final approval or declined decision. See the following section, Final Authority/Final Decision.

1. Assign alternates. (example: "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. Click the "Add alternate approver" link and add the person.

2. Augment the workflow with additional steps. (example: "We also would like the Committee Chair to see this.") Click the "Add step" link and select a role to add to the workflow.

   Note: When a step is added, it is required by default. Uncheck "Required" and the approver becomes optional. Think of optional approvers as overseers or proofreaders, designed to be another set of eyes. If they neglect to approve the waiver, it is inconsequential to the overall approval process.

3. Reorder Steps. (example: "let's not bother the Dean until the Committee Chair says yes.") Click the "Reorder steps" link.

Final Authority/Final Decision

The very last required person in the workflow is the Final Authority and will ultimately make the final decision on the search waiver request.

The final authority has the ability to approve the search waiver or decline it. They are the only approver who has both action buttons:

- Approve search waiver request
- Decline search waiver request

Like any approver, the final authority may jump ahead of others with their vote; they don't have to wait until it's their turn. Even if all previous approvers approved the waiver, the final authority can override the decision with a decline.

Final authorities are the only approvers who may revisit their vote and may reverse it if they want to. This is done using the menu item, Final decision.

Using the menu item, Final decision, final authorities may use the text box provided to leave a note regarding their decision. Their note updates the waiver’s PDF.

The following actions by the final authority will trigger an email to the analyst:

- If the final authority approves, and all prior steps have also been approved, an email is sent to the analyst to that effect.
If waiver is declined, an email will be sent to inform the analyst.

**Locked Waivers**

Once fully approved or declined, search waivers are locked from further changes. However the analyst will still be able to add the hiring outcome and conclude the waiver. Central office comments can also still be added. When locked, a banner appears at the top of the waiver screen:

![Locked Waiver Banner]

**The Waiver Conclusion**

This section is where the analyst will add hiring outcome information and mark a waiver as **Concluded** to indicate that the waiver is done. This provides the central offices (admins) with the information they need for reporting (hire status and employee ID). Concluding a waiver indicates that the entire waiver process is complete.

1. To conclude the waiver, click on the button "Conclude waiver" and confirm the selection within the popup.

2. Concluded waivers can be reopened, which will make them visible by default on the waivers grid as well as approver queues.
Part 5: Exemptions

[At UCR, as of January 2017, this feature has NOT been deployed. Live date to be determined.]

Departments occasionally have a need to bring in academic personnel who are exempt from a search. AP Recruit lets analysts create exemption requests, providing a variety of information. Analysts will then be able to submit the exemption request for approval. A “final authority” will ultimately approve or deny the exemption request.

If you need more guidelines to determine if an exemption is right for you or hire, contact your Recruit administrator or the Academic Personnel Office.

View all Exemptions

1. Click Exemptions in the top menu bar.

2. The exemptions page opens.
3. From oldest to newest, all exemptions that you have access to will be listed in a grid view.
   - Department analysts see all exemptions created under their department name.
   - School analysts see all exemptions created in every department within their school.
   - Approvers see all exemptions they have been named to approve.
4. Exemptions are associated with a unique search exemption request number (EXR).
   Note: While the EXR# relates to a single candidate, a candidate could potentially have more than one exemption in the system.
5. Adjust the grid information or narrow the list using any of the following tools:
   - Click the “Change Columns” button and specify column criteria.
   - Zero in on an exemption using a search term. Examples: search by EXR#, candidate name, position working title, or home department.
   - Check the boxes in the filter panel to filter by Academic Year, by Open/Concluded, or by Active/Deleted. Click the “Filter” button to activate the filter and “Reset” to remove the filter.

Create a New Exemption

1. Click Exemptions in the top menu bar.
2. Click the button, Create New Search Exemption.
3. Gather all necessary information to process the exemption request. The following is a list of the informational fields needed to process an exemption:
<table>
<thead>
<tr>
<th>Position Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Category</td>
<td>Categorize the type of exemption by selecting from the corresponding menu. Choose “Other” if an option doesn't appear in the menu and explain using the free text field.</td>
</tr>
<tr>
<td>Home department</td>
<td>This department will manage the exemption process.</td>
</tr>
<tr>
<td>Effective start date</td>
<td>Enter the position’s start and end dates. These dates represent when the window opens and the candidate is expected to be working.</td>
</tr>
<tr>
<td>Effective end date</td>
<td></td>
</tr>
<tr>
<td>Candidate name</td>
<td>Place the name of the candidate in this field.</td>
</tr>
<tr>
<td>CV</td>
<td>Browse and upload the candidate's CV.</td>
</tr>
<tr>
<td>Employment status</td>
<td>Select <strong>Current</strong>, <strong>Past</strong>, or <strong>Retired</strong> UC employee and provide the location and employee ID number if asked. Select <strong>Never</strong> a UC employee or <strong>Unknown</strong> if applicable.</td>
</tr>
<tr>
<td>Appointment Section</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Select department to which the candidate will be appointed.</td>
</tr>
<tr>
<td>Title</td>
<td>Select one title code from the list.</td>
</tr>
<tr>
<td>Step</td>
<td>Provide a step for this appointment.</td>
</tr>
<tr>
<td>Proposed appointment start date</td>
<td>Often these dates are the same as the Effective start/end dates. But it could differ. For example, if the Effective start/end spans a year, the actual appointment might be for only one quarter.</td>
</tr>
<tr>
<td>Proposed appointment end date</td>
<td></td>
</tr>
<tr>
<td>Percent time</td>
<td>Enter the percent of time for this appointment.</td>
</tr>
<tr>
<td>Add another appointment</td>
<td>Use this link to add another appointment.</td>
</tr>
<tr>
<td>Additional Details section</td>
<td></td>
</tr>
<tr>
<td>Additional information about the position or candidate</td>
<td>Provide any additional information regarding the position or candidate. This is optional.</td>
</tr>
<tr>
<td>Department comments</td>
<td>Any department comments can be added to this section. This is optional.</td>
</tr>
<tr>
<td>Documentation section</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Supporting documents</td>
<td>Browse and upload one or more additional documents that helps to support the exemption request with evidence. The uploaded files will be appended to the PDF and visible to the approvers. Files must be uploaded as .pdf, .txt, or images.</td>
</tr>
<tr>
<td>Description of uploaded file</td>
<td>Provide a short description.</td>
</tr>
<tr>
<td>Comment</td>
<td>Leave a comment about the document.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tools Section: Activity Log and Delete Exemption</th>
<th>Description</th>
<th></th>
</tr>
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<tbody>
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<td>Activity log</td>
<td>All users with access to the exemption may see this tracker.</td>
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</tr>
<tr>
<td>Delete exemption</td>
<td>In the event that an exemption was created in error, analysts can delete all record of it. Deletion is only possible if it has not been submitted for approval. Once it has been submitted for approval, only an AP Recruit administrator is able to delete an exemption. Exemptions cannot be undeleted, even by admins.</td>
<td></td>
</tr>
</tbody>
</table>

**Exemption Approvals**

Exemption approvals work similarly to the other types of approvals in AP Recruit.

- Approvers named in the workflow receive notification emails.
- Approvers may download the PDF, look it over, and leave a comment if they find deficient areas.
- PDFs are "live updating." This means that any changes made to the PDF while it is under review takes place in real time.
- Once all approvers have voted on the exemption, AP Recruit "snap-shots" the document for the electronic record.

1. Click **Exemptions** in the top menu bar.
2. Find the exemption in the list.
3. Open the exemption by clicking anywhere on the row.
4. The status of an exemption is found at the top of its screen, marked by Draft, Pending, Approved, or Declined icons.

- Draft: The exemption hasn't been submitted for approval.
- Pending: The exemption has been submitted and is pending approval(s).
- Pending Final Decision: The exemption has been approved and is ready for the final decision.
- Approved: The exemption has been approved by all approvers named.
- Declined: The exemption has been declined by the final authority.
5. The **Preview exemption request PDF** button is available any time a new exemption is created and it opens the most recent version of the exemption in a PDF. The watermark diagonally across the document disappears once all approvers have voted.

### Submit Exemption Request for Approvals

1. Click the link in the status bar, **Submit it for approval**.
2. A list of approver's steps appears. If the workflow seems incorrect, cancel and contact support. Otherwise, click "Yes, submit for approval."
3. The approval request screen opens.

#### Specify Persons

Each step must have at least one person assigned. In most cases, the system automatically takes care of this. For example, the Diversity Office may already be pre-populated with a person's name and perhaps an alternate.

1. For any step that is not labeled with a person's name, click the link, **"Specify person"** and add the person.

#### Communicating with approvers

**Add a comment:** Permanently attach a comment to this exemption request. Approvers will see your comment when they log in.

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

- The email includes a direct link to the approval screen where approvers may download the PDF, comment, and approve.
- As soon as AP Recruit detects an approval, the next in line is notified.
- After the last step approves, AP Recruit sends a notification to the submitter (analyst) 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. (Examples: to prod the approver who's taking too long, to warn the pending approvers about what's coming their way, or to highlight a change that previous approvers might need to know about.

#### Changing the Approval Workflow

It is possible for analysts to redesign the established workflow — but only until the final authority votes.

**Add alternate approver** ("I know she's on sabbatical; let me fill in the interim chair.") If you name an alternate approver, only one person needs to approve.
**Add step** Augment the workflow with additional steps. (example: "We also would like the Committee Chair to see this.") Click the "Add step" link and select a role to add to the workflow.

**Note:** Added steps are required by default. When you uncheck "Required" the approver becomes Optional. Think of optional approvers as overseers or proofreaders, designed to be another set of eyes. If they neglect to approve the exemption, it is inconsequential to the overall approval process.

**Reorder steps** ("let’s not bother the Dean until the Committee Chair says yes.")

### Final Authority / Final Decision

The very last required person in the workflow is the Final Authority and will ultimately make the final decision on the exemption. The final authority has the ability to approve the exemption or decline it. They are the only approver who has both action buttons:

- ![Approve exemption request](image)
- ![Decline exemption request](image)

Like any approver, the final authority may jump ahead of others with their vote; they don’t have to wait until it’s their turn. Even if all previous approvers approved the exemption, the final authority can override the decision with a decline.

Using the menu item, **Final decision**, the final authority may edit their note regarding their decision. Their note is reflected in the exemption’s PDF.

The following actions by the final authority will trigger an email to the analyst:

- If the final authority approves, and all prior steps have also been approved, an email is sent to the analyst to that effect.
- If exemption is declined, an email will be sent to inform the analyst.

### The Exemption Conclusion

Once the Final Authority has approved or declined the exemption request, the analyst should conclude the exemption to indicate that the entire exemption process is complete. Analysts will receive an email notification on the exemption’s effective start date if it has not yet been concluded. If it has not been concluded seven days after the effective start date, another notification will be sent to the analyst.

- Concluded exemptions are not displayed on the exemptions grid by default.
- Approvers will not see concluded exemptions in their queues.
- Concluded exemptions can be reopened, which will make them visible by default on the exemptions grid as well as in approver queues.
**Hiring outcome**

1. If the exemption is incomplete, a checklist appears, indicating the **Hiring outcome** is lacking information. Click the corresponding "Add now" links to reach the missing data fields and provide the missing **hiring outcome** information.

   ![Exemption checklist](image)

   - **Exemption conclusion**
   - Not yet concluded. Before concluding the exemption:
     - Hiring outcome must be entered • Add now
     - Appointment start date must be entered • Add now
     - Employee ID must be entered • Add now
     - Exemption must be approved • View approval request
     - Appointment
     - Proposed appointment must be provided • Add now

2. To conclude the exemption, click on the button “**Conclude exemption**” and confirm.

   ![Conclude exemption button](image)

Concluded exemptions can be reopened, which will make them visible by default on the exemptions grid.
Appendix A

How Applicants Use AP Recruit

- Browsing applicants locate the recruitment on Recruit’s apply page [https://aprecruit.ucr.edu/apply](https://aprecruit.ucr.edu/apply) preferably they click the direct link which is provided wherever the position is advertised.
- They create their account (email address and password).
- They fill in their contact information, highest degree information, current employment information, etc. After clicking “Register,” 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 My Account page with their email address 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 My Account page by clicking the link on the login box, “Forgot password?”
- Applicants may apply for multiple positions, however each position requires its own Register (email address and password).
- “Contact Us” links appear in several locations before and after applicants are logged in. General and technical questions are sent automatically to aprecruit@ucr.edu. All others are sent to the recruiting department.
- Online Help docs are available to applicants when they are logged in or not logged into their accounts.

The Applicant’s Dashboard

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

Recruit will send a confirmation email when the application is complete. See Appendix B.
**My Information.** The applicant’s contact information, current employment information, specializations, highest degree information, and account information is editable by the applicant using the “Update” buttons.

**My Files.** Applicants upload the necessary files using the “Upload Now” link. If an applicant needs to mail in documents via U.S. Postal mail, the “Show” link displays the department address.
My References. When Contact Information Only is required, providing the reference’s name & information satisfies the requirement.

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

Applicant’s 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 AP 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 AP Recruit and upload a letter.

Uploading a letter of reference

1. References receive an email with the subject line, "UC Riverside Recruit: Letter of Reference Requested"
2. The Reference is instructed to log into AP Recruit one of two secure ways:
   - Using the Easy Login Link OR…
   - Using their email address with a token combination at https://aprecruit.ucr.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.

![Image of AP Recruit login screen]

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.
   - 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 AP Recruit, but will be notified that they have been submitted.
   - AP 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.

The Reference provides a letter of recommendation.
How Approvers Use AP Recruit

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

1. **Look for an email from AP Recruit, Subject: UC Riverside Recruit: Approval Request [name of recruitment].**
   - For the exact wording, see Appendix B, “Notifications Sent to Approvers.”
   - Approvers are prompted to log into AP 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 AP Recruit directly**
   - Navigate to https://aprecruit@ucr.edu and click “UC Riverside 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. [At UCR: Use this to send back a plan or report for corrections before approval.]

**Approve button:** To approve the plan.
  > **Approvers:** Displays the identities of any other approvers named in the workflow. The arrow indicates who 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 AP Recruit

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

A Quick Guide for faculty reviewers may be downloaded from the Home page.

The Recruitments menu leads to all recruitments for which the reviewer has been assigned access.

Reviewers may link to the recruitment’s details and also to the applicant pool. The number in parenthesis is the total number of completed applications.

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

![Application Review Screen]

**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 at the top of the review screen.
2. **About** — The About section contains the information provided by the applicant.
   - Degree/Institution/Date
   - PhD Advisors
   - Dissertation title
   - Email address
   - Personal website
   - Phone
   - Mailing address
   - Specializations: Analysts can adjust applicant-selected specializations. Changes will be applicant-facing, and will appear in the applicant’s log.
3. **Specializations** — This section displays the applicant’s self-selected specialization(s) from a customized list that had been established as part of the recruitment’s initial setup. You may filter applicants by specializations on the pool view screen.
4. **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).

5. **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”.

6. **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.

7. **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.

8. **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 flag.
   - Flags are by default, displayed to the rest of the search committee.
   
   **Note**: Analysts, committee chairs, and editors may privatize flags on a per applicant basis. *At UCR: AP Recruit does not provide a way to rank candidates from within the system. Reviewers can add applicant ranking to the reviewer COMMENTS or FLAG field. Please contact your College/School/Organization AP Recruit Subject Matter Expert (SME) regarding your organization’s process for entering ranking candidates.*
Appendix B

Notifications Sent to Applicants

1. Application 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.
   - Tracked in applicant's log.

   **Subject: UC Recruit: Application Started**

   Dear [applicant name],

   Thank you for starting an application for [Recruitment name] at the University of California, XYZ.

   To ensure full consideration, please complete your application by [review date].

   Your Application Details
   Your username: [username]
   Login link: [Link to applicant login]
   Recruitment Name: [recruitment name]
   Department: [department name]
   School: [school name]

   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.

   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.

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

   UC Recruit Team
   University of California, XYZ

2. Application Complete
   - 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.
   - Tracked in applicant's log.

   **Subject: UC Recruit: Application Complete**

   Dear [applicant name],

   Please complete a one-page survey to help us meet our obligation as a federal contractor.

   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.

UC Recruit Team
University of California, XYZ

3. Application Confirmation and Survey Request
- 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).
- Tracked in applicant's log.

4. Application Completion Deadline Approaching
- Sent to all incomplete applicants ~3 days before the recruitment’s edit deadline (a final date or review date).
- Tracked in applicant's log.

5. Application has been submitted on your behalf
- Initiated by the analyst.
- May be sent only once.
- Notifies the applicant that they’ve been added to the pool.
- Tracked in applicant's log.

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, Riverside.

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

--
[Analyst signature]
University of California, XYZ

6. Access Your Application
- Initiated by the analyst.
- May be sent multiple times.
- Sent to applicants who were added to the pool by an analyst.
- Includes instructions to access the account.
- Includes a 72 hour expire link.
- Tracked in applicant's log.

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 log in]

This will direct you to a page displaying your ApplicantID (login name) with an opportunity to choose a confidential password. This link will expire in 72 hours.

[Analyst signature]
University of California, XYZ

7. Optional Document Requested
- Initiated by the analyst when a new, optional requisite is added after there are already applicants.
- Analyst can choose not to send the notification but is encouraged to do so.
- Includes instructions to provide the new, optional document.
- Sent to all applicants, complete or incomplete.
- Includes a deadline to provide the document.
- Isn't editable after it is sent.
  - Tracked in applicant's log.

8. 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.

9. Bulk email correspondences (Subject line is customizable)
- Initiated by the analyst, chair or editor and sent to selected applicants.
- Optional variables may be inserted into the body of the email:
  - ApplicantFirstLastName, RecruitmentAddress, ContactAddress.
- Isn't editable after it is sent.
- Tracked in applicant's log.

Notifications Sent to References

1. Letter of Reference Requested
- Initiated by applicant as part of application process (when letters are required).
- Asks the reference to log in and submit a letter.
- UC Confidentiality Statement is included.
- Applicant may personalize the message.
- Applicant can re-send request until the final date or beyond a review date.
- Tracked in applicant's log.

2. Request for Letter of Reference for <applicant's name>
- Initiated by analyst, chair, or editor and sent to selected references.
- Provides instructions to submit a letter.
- UC Confidentiality Statement is included.
- This ability is only available if the reference requirements are set to “Contact only.”
- Analyst, chair, or editor may re-send at any time.
- Tracked in applicant's log.

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
3. Thank you for your contribution

- Initiated when a reference letter is uploaded into AP Recruit.
- Confirms and thanks the reference for providing the letter.
- 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

1. Approval Request

- Email is sent to approvers who are next in line in the workflow (Search plan, reports, and Waiver requests).
- 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 has 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.
- ‘cc is sent to the analyst who submitted the item.

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)
Department: Earth System Science
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]

2. Approval Update

- Approvers who have previously approved an Applicant pool report or Shortlist report are sent a courtesy 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]

3. Approval Comment / Notify Approvers (Customizable)
   - Customizable email can be sent to All approvers, Previous approvers, Current approver, or Pending approvers who are listed in a workflow (Search plan, reports, and Waiver requests)
   - Initiated from the Notify Approvers button from the approval screen.
   - Action is logged in the comments section of the approval screen.

Notifications Sent to Analysts

1. Applicant Pool Report Needed (reminder) (recruitments only)
   - A reminder to create the Applicant Pool Report is sent to the department analyst in charge of the recruitment.
   - Automatically sent prior to the close date of the recruitment or the final date for IRD recruitments.
   - Includes instructions how to submit the report for approval.

2. Approval Comment (search plans, reports, search waivers, and exemptions)
   - Automatically sent to the analyst when any approver leaves an approval comment.
   - The comment is included in the message body.
   - Tracked in activity logs

   Subject: UC Recruit: Approval Comment: [Associate Professor of Chemistry [JPF00123]]
   Hello,
   John Faculty left a comment on the following approval:
   Recruitment name: Associate Professor of Chemistry (JPF00123)
   Approval request for: Search Plan
   Please be more specific about your planned search recruitment efforts.
   To view or comment on this approval, please visit: [Link to approval screen for this recruitment search plan]

3. Approval Complete (search plans, reports, search waivers, and exemptions)
   - Automatically sent to the analyst when all approvers’ signatures have been attained.
   - The next steps to take may be included in the message.
   - Tracked in activity logs.

4. Waiver Declined (search waivers and exemptions)
   - Automatically sent to the analyst when the waiver or exemption has been declined by the final authority.
   - A final decision note may be included in the message.
   - Tracked in activity logs.

5. Waiver or Exemption Deleted
   - Automatically sent to the analyst when a Recruit administrator deletes a search waiver or exemption.
   - Tracked in activity logs.

6. Conclude a Waiver or Exemption Reminder
   - A notice is automatically sent when the waiver or exemption needs to be concluded.
   - By default, the reminder is sent to the analyst on the Effective Start Date. (Check with your campus administrator, as this default may be different)
   - A second reminder is sent 7 days after the Effective Start Date. (Check with your campus administrator, as this default may be different)
Emails Sent To AP Recruit Support Staff

Here are the various emails sent via the applicant’s “Contact Us” forms.
- not_logged_in_recruitment_question
- not_logged_in_general_question
- not_logged_in_technical_question
- logged_in_recruitment_question
- logged_in_general_question
- logged_in_technical_question

Here are the various emails sent via the reference’s “Contact Us” forms.
- reference_general
- reference_general_logged_in
- reference_technical_logged_in
- reference_recruitment_logged_in

Supporting AP 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:

<table>
<thead>
<tr>
<th>From:</th>
<th>[Recruit] UC Irvine Recruitment: Applicant Question for Assistant Professor – Ballet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject:</td>
<td>UC Recruit: Question for Assistant Professor – Ballet</td>
</tr>
<tr>
<td>To:</td>
<td><a href="mailto:recruit@ucirvine.edu">recruit@ucirvine.edu</a></td>
</tr>
</tbody>
</table>

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

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

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

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

Figure D: Applicants who cannot locate a position on the Apply page are given instructions to contact the department for assistance.
Figure E. Mail is routed to the proper person when the applicant chooses from the drop-down menu. (person is logged in)
Appendix C

Special Tools for AP Recruit Administrators

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

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

<table>
<thead>
<tr>
<th>Support Tools</th>
<th>Campus Settings</th>
<th>Site Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Find applicants</td>
<td>Manage home page news</td>
<td>Approval workflows</td>
</tr>
<tr>
<td>Find references</td>
<td>Manage user roles</td>
<td>Configure default approval list</td>
</tr>
<tr>
<td>Proxy as user</td>
<td>Manage users</td>
<td>Configure waiver behavior</td>
</tr>
<tr>
<td>Create fake recruitment</td>
<td>Create and edit users</td>
<td>Exemptions</td>
</tr>
<tr>
<td>Availability data</td>
<td>Manage academic unit hierarchy</td>
<td>Permission options</td>
</tr>
<tr>
<td></td>
<td>Create a fake recruitment for training or other purposes</td>
<td>Configure what permissions roles have</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Features</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See which features are enabled on this site</td>
</tr>
</tbody>
</table>

Find Applicants: Search for applicants, past or present, in AP Recruit. (If you do not have this tool, your role is not set to Recruit administrator).
- Use “Show Filters” to locate an applicant.
- Access an applicant’s file using the “Manage” or “Review” link.

Find References: Search the Reference logs. This information is used to determine if:
- The token has been input incorrectly.
- The letter has not yet been requested.
- The applicant has revoked the request for a letter.
- The applicant has deleted the referee.

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

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

1. Log into your campus AP Recruit *training* site.
2. When prompted, give your fake recruitment a name and choose a department. Specify the number of additional qualified, complete-but-not-qualified, and incomplete applicants, as well as the percentage of the survey participation rate.

**Availability Data**

Admins may look through the complete and current numeric availability data that AP Recruit receives from NORC and other data sources (AAMC, AALS, Lib). When analysts create a new recruitment, they select one or more fields of study and enter title codes. This information is used in the Applicant Pool and Shortlist reports to display availability percentages that most closely match the field of study and title.

1. Click on "Availability Data" in the support tools. (If you do not have this, your role is not set to Recruit Administrator.)
2. Select an availability data source from the drop-down menu and view the resulting raw data.
Note: If a row displays zeros, this indicates the field of study is either to new to have any data or it's no longer a field offered to survey-takers.

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

This admin tool’s interface shows current and archived news posts along with a “Create New Item” button.

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

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

In the Manage User Roles admin tool...
1. Click the button, "Add Role for User."
2. Search for the person by name, email or UCR NetID.
3. Select a user role from the drop down menu.
4. Choose a resource type from the drop down menu.
   Note: Most of the time, select either Department or School. Committee roles will be assigned by the Analyst as part of the search Plan. Choose “Tool” when assigning roles across the system.
5. Click “Save” when finished.
6. Type their name and click “Find” to confirm that the user is in the alphabetical listing.
Locate users by their sign-in name on the “View by users” tab.

Locate users by their roles.

Manage Users:

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

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

Manage Academic Unit Hierarchy: Sometimes academic units change their names or new units must be added. Warning: Nightly data feeds could overwrite your manual entries so work with a programmer if you have concerns before you use this tool. In some cases, data feeds must be adjusted, or they will overwrite any changes made.

Adding a New Department:
- Find the school listed on the page and click the link, “Add Department”.
- Name the department.
- Provide a unique identifier. This is typically the payroll home department code.
- Click “Add”.
- Use the “Edit” link to change this information.
Deleting a Department:
- Scroll to the department and click the button, “Delete.”
- Confirm the deletion.
- Departments with active recruitments or user roles can’t be deleted unless these are assigned to different units first. Hover over the “Delete” button to view total number of recruitments and associated user roles.

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.

Deleting a School:
This tool offers no way to delete schools. Contact AP Recruit support.

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, Applicant Pool Report, Shortlist Report, or Search Report. Select "All" to have a catchall workflow when the other workflows you’ve designed won’t fit for whatever reason.
4. Click to apply this workflow to specific schools or click All Schools to apply globally.
5. For even more granularity, choose condition based on Title Codes.
6. Choose the recruitment type: Only Senate, Only non-Senate, or Both Senate and non-Senate.

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

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

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

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

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

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

**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.
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.

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

**Waivers Configuration Tool**

Recruit administrators may want a smaller, stricter set of search waiver categories than the default set. They may decide which waiver categories are selectable for new waivers. Conversely, they may also wish to add new categories to the default set. For this, the waivers admin tool allows Recruit admins to customize their list of categories.

**Adding a Waiver Category.** Add a new waiver category to the justification list.

1. Click "Edit" in the search waivers category section.

2. Click the "Add" button for either the Senate or Non-Senate waiver categories.

3. Enter the name of the new category and click "Add."

   Optional: Click “Add description” to add a brief description of the category or to describe some restriction for using the category. This will display to analysts when they choose the waiver category during its creation.
4. Don’t forget to "Save changes."

   **Note:** After adding the category, it will immediately be available on the waiver Justification page in the Category menu. Once a category is in use by a waiver, the category cannot be changed. You must archive it and add a new category in its place.

**Archiving a Waiver Category.** Admins can also archive waiver categories that are not acceptable.

1. Click "Edit" in the search waivers category section.

2. Click the "Archive" button next to the category you wish to archive. Click “Save changes.”

   Previously archived waivers can be viewed by clicking the "Show Archived" button.

**Grant information.** Admins can select which search waiver categories will allow the optional addition of grant information. Once a category has a waiver with grant information entered, the grant information option cannot be removed.

1. Click “Edit” in the grant information section.

2. Check all the search waiver categories that should allow grant information to be entered.

3. Click “Save changes.”

**Exemptions Configuration Tool**

Recruit administrators may customize their list of exemption categories. To add, edit, or archive a category, please see the previous section, "Waivers Configuration Tool."

**Permission Options:** Customize what other permissions are available to the system’s users. Who can publish a plan? Who can create and manage the reports? Who can view incomplete and late applications? Adjust these setting for site-wide default behavior.
Features: This tool is shown only to the campus’ Recruit administrators and displays which features are enabled on the AP Recruit site. If a feature is not available or a feature needs to be deactivated the user may contact AP Recruit technical support at UC Riverside.

Administrative Reports

Start with Reports in the top menu bar:

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

UCOP Reports

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

Faculty Search Report:

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

- Core search committee composition
  - Download a report containing diversity data on unnamed core search committee members. Core members are those individuals who were listed on the campus recruitment planning form and
have been added to the search committee in AP 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.

**O 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.

**O 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.
3. Choose **Recruitment Type** (Regular Rank, Non Regular Rank, or All Rank).

**Recruitment and Retention Report:**

**O Offers**

- Report shows applicants in the selected academic year with a status of Offered, Accepted, Declined, or Withdrawn.
- **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.

1. **Recruit Administrator** or **Diversity Analyst** access is required for this activity.

   Click the **Applicant & Diversity Download Data** tab on the Reports page.

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

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