UC Recruit User Manual

UC Recruit is the academic recruitment and application management tool for the University of California

Recruit provides for secure online academic employment recruitment management, supporting the entire recruitment workflows from early approvals, opening recruitments, applications, reference gathering, search committee review, and 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 Office of the President uses to ensure all campuses meet their requirements as equal opportunity employers. Recruit also ensures the security and integrity of all applicants, references, 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.

- The 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 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 assistance.

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 the “Faculty & Administrators” link.
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.

The top menu choices will differ depending on the user’s role in Recruit. If you only see News & Updates, you have not been assigned any role and should contact recruit@uci.edu for help. All users know they are logged into Recruit by looking to the right on the menu bar. This is also how users log out of the system.

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

The role you are assigned in Recruit determines the tasks you can perform. 

Recruit Administrators are the primary supporters for all other users and have the most Admin tool access and all the access rights of the roles listed below.
**Recruit User Managers** act as gatekeepers, assigning, editing and removing user roles for others.

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

**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** This 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 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 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 those responsible for overseeing the Search Plan, Applicant Pool Reports, Shortlist Reports, Search Reports, Waivers requests and Exemptions requests. Approvers are either system-assigned or assigned by analysts on a recruitment-by-recruitment basis. The following approver steps may be 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 Recruit................................................................................................................. 2
  User Roles in Recruit....................................................................................................................... 3

Part 1: Recruitments.......................................................................................................................... 8
Create the Basic Recruitment............................................................................................................. 8
  Open/Closed/Final Recruitments vs. Pool Recruitments............................................................. 9
  Title Codes and Availability Data................................................................................................ 11
Configure the Recruitment for Online Applications......................................................................... 13
The list of recruitments....................................................................................................................... 15
  Download Recruitment Data......................................................................................................... 15
  Locate applicants across all recruitments....................................................................................... 16
Managing Recruitments.................................................................................................................... 16
  The Status of the Plan:................................................................................................................... 16
  URL for Applicants:....................................................................................................................... 17
  Availability Data:.......................................................................................................................... 18
  Pool Diversity:.............................................................................................................................. 18
  Affirmative Action Goal:............................................................................................................... 18
  Equity Advisors:............................................................................................................................ 18
  Planned Search and Recruitment Efforts:..................................................................................... 19
  Actual Search & Recruitment Efforts:........................................................................................... 19
  Ad Documents:............................................................................................................................. 19
  HERC Categories:........................................................................................................................ 19
  Ad Sources:................................................................................................................................... 19
  Ad Evidence:................................................................................................................................ 19
  Search Sources:............................................................................................................................. 20
  Selection Criteria:......................................................................................................................... 21
  Selection Plan:............................................................................................................................... 21
  Specializations:............................................................................................................................. 21
  Conclusion – The end of the search............................................................................................... 26
Search Plan Approvals....................................................................................................................... 29
  Submit the Plan for Approvals.................................................................................................... 29
  The Approvals Dashboard............................................................................................................. 31
Publish the Approved Plan............................................................................................................... 32
Editing the Recruitment..................................................................................................................... 33
  Editing an Approved Plan............................................................................................................ 33
  Editing a Published Recruitment ................................................................................................ 33
  Special Editing: Adding Review Dates......................................................................................... 33
  Special Editing: Cross-listing Recruitments................................................................................ 34
  Special Editing: Changing the Recruitment Submission Type.................................................. 35
  Special Editing: Editing Documents (after applicants have applied)......................................... 35
Deleting a Recruitment..................................................................................................................... 36

Part 2: Applicant Pools and Individual Applicants........................................................................... 37
Download Applicant Data................................................................................................................ 37
Working with the applicant list......................................................................................................... 38
Send Bulk Email............................................................................................................................... 39
Add an Applicant.............................................................................................................................. 40
Statuses and Short-listing.................................................................................................................. 41
  Updating Applicants’ Statuses..................................................................................................... 41
Decline Reasons ................................................................. 43
Withdrawn Applicants .......................................................... 44
Meets Basic Qualifications ..................................................... 44
Disposition Reasons ............................................................. 47
Editing Applications ............................................................ 48
  Update personal information .............................................. 48
  Adjusting specializations ............................................... 49
  Managing applicant’s documents ..................................... 49
  Managing an applicant’s references & letters ..................... 52
  Comments and flags management ................................... 54
  Scheduling/managing a visit ............................................ 54
  Managing offer details ..................................................... 55

Part 3: Reporting .................................................................. 57
Applicant Pool and Shortlist Reports ...................................... 57
  The Applicant Pool Report ................................................ 57
  The Shortlist Report ......................................................... 57
  Creating the Reports ....................................................... 57
Report Approvals .................................................................. 60
  Fixing Reports “In Flight” ................................................. 60
Search Reports ..................................................................... 62
  Search Report Components ............................................ 62
  Creating Search Reports .................................................. 63
Search Report Approvals ..................................................... 64
  Live-Updating ................................................................ 64
The End of the Search .......................................................... 65
  Conclude the search ....................................................... 65
  “Inactive” ..................................................................... 66

Part 4: Search Waivers ......................................................... 67
Create a New Waiver ........................................................... 68
  Category ..................................................................... 70
  Funding agency ............................................................. 70
  Grant number ............................................................... 70
  Salary from grant ......................................................... 70
  Percent time working on grant ....................................... 70
Search Waiver Approvals ..................................................... 72
Submit Waiver Request for Approval .................................. 72
  Final Authority / Final Decision .................................. 74
  Locked Waivers ............................................................ 74
  Waiver Conclusion ......................................................... 75

Part 5: Exemptions ............................................................... 76
Create a New Exemption ....................................................... 77
  Browse and upload the candidate’s CV ......................... 77
  Additional information about the position or candidate .... 78
  Department comments .................................................. 78
Exemption Approvals ........................................................... 79
Submit Exemption Request for Approvals ......................... 79
  Exemption Conclusion .................................................. 81

Appendix A .......................................................................... 82
How Applicants Use Recruit .................................................. 82
How References Use Recruit ............................................... 85
How Approvers Use Recruit ................................................ 86
How Committee Reviewers Use Recruit ................................................................. 87

**Appendix B**............................................................................................................. 91
Notifications Sent to Applicants................................................................................. 91
Notifications Sent to References............................................................................... 93
Notifications Sent to Approvers............................................................................... 94
Notifications Sent to Analysts................................................................................. 95
Emails Sent To Recruit Support Staff....................................................................... 96
Supporting Recruit’s End-Users............................................................................. 97

**Appendix C**............................................................................................................. 99
Special Tools for Recruit Administrators ............................................................... 99
  Find Applicants................................................................................................. 100
  Find References.............................................................................................. 100
  PII Audit.......................................................................................................... 100
  Proxy as User................................................................................................. 102
  Create Fake Recruitment ................................................................................... 102
  Availability Data............................................................................................... 102
  Committee membership audit........................................................................... 103
  Manage Home Page News................................................................................ 103
  Manage User Roles......................................................................................... 103
  Manage Users.................................................................................................. 104
  Manage Academic Unit Hierarchy .................................................................... 104
  Approval Workflows......................................................................................... 105
  Approval Workflow Permissions: ...................................................................... 106
  Waivers Configuration....................................................................................... 107
  Exemptions Configuration.................................................................................. 108
  Permission Options........................................................................................... 108
  Features............................................................................................................ 109
  Administrative Reports....................................................................................... 110
Part 1: Recruitments

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 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 Opportunity/Affirmative Action Employer tag line (EEO).
Include the URL for Applicants that the system will auto-assign. This description text will also be used when the recruitment is posted to HERC.org 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 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.
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.

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 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. 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

This is when you 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 character 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.

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

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

- **Type**: Choose None, Only contact information, or Letters of recommendation.
- **Number**: For contact information or letters, choose the minimum-to-maximum range required.
- **Search Committee Reference Viewing Rights**: You may restrict who sees contact information or letters to certain search committee members: (1) All reviewers, (2) Only faculty members, (3) Only assistant, associate & full professors, (4) Only associate & full professors, or (5) Only full professors. This flexibility is important if departments wish to exclude any graduate students who may be serving on their search committee.

- Click the **Next** button and complete the information on the next page:
Help Email Address is the address where questions from applicants will be directed. This address is also used in the “From” line in a number of other correspondences between the department, applicants, and references. Refer to the text on the screen for those specific situations.

“Thank You” Email Sent to References is a fully customizable template that Recruit sends to references after their letters of recommendation are uploaded into the system.

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.
THE LIST OF RECRUITMENTS

1. Go to the Recruitments page. Click **Recruitments** in the top menu bar.

2. All recruitments that you have access to will be listed in a grid view.

   Permissions: Who sees what?

   - 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.

3. Narrow the list or adjust the data using any of the following tools:

   - **Search**: Go to a particular name or attribute using the search box.
   - **Columns**: Many columns are sortable. Click directly on a column header for alphanumerical sorting.
   - **Filters**: Filters display on the horizontal *workspace ribbon*, located at the top of the data grid. In the middle of the ribbon, you’ll see which filters are active. Hover or click on any filter to quickly update it.
   - **Edit workspace**: Use the *Edit workspace* button to customize your filters and columns.

   - **Manage workspaces**: You have control over the information displayed in your list of recruitments using *workspaces*. Think of a workspace as a combination of particular filters, columns, and sorting. Hover or click the end cap of the workspace ribbon to create & name a workspace, rename, or delete it.

**Take a Tour!**

For a step-by-step introduction to Recruit’s workspaces, click the Tour button, located at the top-right side of your screen, just below your login name.

**Download Recruitment Data**

Academic units want to monitor, report, or learn from past hiring, Recruit’s method of exposing data make doing so easy. Use filters, columns, and sorting to query, display, and download the data and then analyze it in Excel. Click:
Recruit will create a comma-delimited file, “recruitments-yyyyymmdd-####.csv” consisting of all the data within the workspace 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.

**Locate applicants across all recruitments**

This control allows users to locate anyone with an application in any of the recruitments within their scope.

1. At the top of the recruitments page, click the link, “**All applications.**”

2. Adjust the information using the workspace ribbon across the top of the grid.

**MANAGING RECRUITMENTS**

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

<table>
<thead>
<tr>
<th>JP #</th>
<th>Name</th>
<th>Department</th>
<th>Submission Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>JPF00258</td>
<td>Laudantium Rerum Ut Recruitment</td>
<td>Department of Nemo Ut</td>
<td>Open 5/24/2012 – 7/29/2016</td>
</tr>
</tbody>
</table>

**Details**

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

**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 shows various states for a recruitment.
URL for Applicants: A unique URL for the recruitment is displayed in the status box. Use this link for job ads, postings, electronic mailings, and links on other websites. Clicking the URL displays a preview of the apply page as it will appear to applicants once the recruitment is open and published.

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 the badge for help text.
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:** Describe all planned efforts to reach a broad and inclusive applicant pool. This 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.

**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. Return to this area when you can provide proof that an advertisement was placed. This information will be included in the final Search report.

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

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 (ex: 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: 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 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. Reviewers may be given permission to disposition applicants.

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

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

   ![Add members button](image)

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

   ![Add Members to Search Committee](image)

   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 EEAA (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.

Conclusion – The end of the search

Analysts will return to this section when the search is ready to be concluded.

Search Outcome

Use the search outcome section to tell Recruit how things went with the search.

1. Click the button, Select the outcome of this search.

2. Make a selection from the outcome choices. Add a note. “Canceled” and “Other” require an explanation.

3. Administrative review will be required to conclude searches with outcomes marked “Other.”

4. Click Save changes.
Proposed Candidates

The panel in the middle of the page displays any candidates that have been put forward as potential hires. This tool directs analysts to pull the candidates into their final statuses in preparation for the conclusion of the search.

<table>
<thead>
<tr>
<th>Applicant</th>
<th>Status</th>
<th>Appointment Start Date</th>
<th>Employee ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bridget Krajel</td>
<td>Withdrawn after proposed candidate</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Nathan Stanton</td>
<td>Campus declined to make offer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sterling Winters</td>
<td>Offered</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sherman Jorde</td>
<td>Declined offer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wendy Klocko</td>
<td>Hired</td>
<td>May 31, 2017</td>
<td>7654323</td>
</tr>
</tbody>
</table>

1. Roll over the orange dot for instructions.

2. Use the link beside the candidate for easy status updating.

3. Update all the candidates displayed in the panel to **Hired**, **Declined offer**, **Campus declined to make offer**, or **Withdrawn after proposed candidate**.

Recruitment closing

Use this section for recruitments advertised as “Open until filled.” Analysts can request early closure from an administrator. Early closure will prevent new applicants from applying while you finish up reports and approvals. When everything is done, the recruitment can be concluded.

1. In the section, **Recruitment closing**, click “Request pool closure” to trigger an email to an administrator.
2. Explain why the pool should be closed early and an administrator will review your request and assist.

Recruitment conclusion

Finally, move to the Recruitment conclusion section on the page.
1. A checklist indicates if any information is missing. For example, it may cue you to update a candidate to **hired** or to provide an explanation for a canceled search outcome. Follow the corresponding link(s) to reach the missing data fields.

2. Once all items in the list are satisfied, click on the button **Conclude recruitment** and confirm.

3. The date and person who concluded the recruitment is logged. If concluded by mistake, use the link to ask an administrator to reopen it.

**Notes:**
- Concluded recruitments **are no longer visible** to the search committee, approvers, or applicants.
- Returning applicants may log into their applications, but may not make any changes.
- **Applicant statuses** become **locked** once the recruitment has been concluded in order to ensure that the outcome of the search can be trusted. The status update form remains accessible, but changes cannot be made. If a status must be updated after conclusion, the recruitment will need to be reopened by an administrator.
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. For those steps not assigned:

1. Click the link, “Specify person.”
2. Enter the person’s email address or UCRNetID into the box.
3. Click Add.
Remove specified person. (ex: “I typed the wrong user name here; let me fix that.”) To remove a name you have specified:

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

Assign alternates (ex: “I know he’s on sabbatical; let me fill in the interim chair.”) If you name an alternate approver, only one person needs to approve. In other words, both “signatures” are not necessary. **[At UCR: This may be assigned by the Recruit Analyst with the exception of EEAA, APO & VPAP roles.]**

1. Click the link, “Add alternate approver.”
2. Enter the person’s email address or UCRNetID into the box.
3. Click Add.

Augment steps with additional steps (ex: “we also need the Principal Investigator’s vote”). **[At UCR: Diversity Office and APO roles cannot be modified. Contact aprecruit@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. (ex: “let’s not bother the Dean until the Principal Investigator says yes”).

1. Click the link, “Reorder steps.”
2. Place your cursor over the icons and drag the step into place.
3. Click “Save changes.”

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

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

   ![Notify Approvers Button](image)

2. Type the message, choose whom to send it to, and click “Send Email.”

   ![Notify Approvers Dialog Box](image)

The Approvals Dashboard

Monitor approvals in progress. This page is especially useful for those responsible for many approvals or for those with permission to monitor approval requests across the campus.

1. Click Approvals in the top menu bar. The approvals dashboard opens.
2. Narrow the list or adjust the data using any of the following tools:

- **Search**: Zero in on a particular attribute using the search box.
- **Columns**: Many columns are sortable. Click directly on a column header for alphanumeric sorting.
- **Filters**: Filters display on the horizontal *workspace ribbon*, located at the top of the data grid. In the middle of the ribbon, you’ll see which filters are active. Hover or click on any filter to quickly update it.
- **Edit workspace**: Use the *Edit workspace* button to customize your filters and columns.

- **Manage workspace**: You have control over the information displayed in your data list using *workspaces*. Think of a workspace as a combination of particular filters, columns, and sorting. Hover or click the end cap of the workspace ribbon to create & name a workspace, rename, or delete it.

**Take a Tour!**
For a step-by-step introduction to Recruit’s workspaces, click the Tour button, located at the top, right side of your screen, just below your login name.

**PUBLISH THE APPROVED PLAN**

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

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

   ![Ready to Publish](image)
   *All approvers have approved. Publish now*

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

   ![Really publish?](image)
   *This will convert this plan into a recruitment.*
   - The search committee will see the recruitment immediately
   - Applicants can apply to the recruitment immediately, as it opened on Mar 16, 2015

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

**Unpublish a Recruitment**

This flexibility built into 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.

![Published on](image) *Published on jul 10, 2015 by Xen Eldridge • Unpublish*
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 ad after approvals, please contact OEOD.

Editing a Published Recruitment

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

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

- **General Information**
  - Edit 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 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. 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 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, 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 Recruit Support for assistance.

6. Click “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.

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.

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/Closed/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 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 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.

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.”

DELETING A RECRUITMENT

In the event that a recruitment was created in error, analysts can delete it if the Search Plan has not already been submitted for approval. Once it has been submitted for approval, only a Recruit administrator is able to delete the recruitment.

1. Find the recruitment and click either the “Search Info” link or the JPF number.

2. Click “Delete recruitment” in the menu on the left. Confirm deletion or contact the admin to delete.

   - Deleted recruitments do not show up on any reports.
   - Deleted recruitments do not show up on the apply page to applicants.
   - Deleted recruitments can’t be undeleted, even by a Recruit administrator.
   - When deleted by a Recruit administrator, email is sent to the analyst to that effect.
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.

1. Click the Applicants link beneath the name of the recruitment. Note: The applicant count in parenthesis is the total number of people who have applied. For reviewers, the number represents completed applications:

2. The applicant list opens. Narrow the list or adjust the data using any of the following tools:
   - Search: Zero in on a particular applicant or attribute using the search box.
   - Columns: Many columns are sortable. Click directly on a column header for alphanumeric sorting.
   - Filters: Filters display on the horizontal workspace ribbon, located at the top of the data grid. In the middle of the ribbon, you'll see which filters are active. Hover or click on any filter to quickly update it.
   - Edit workspace: Use the Edit workspace button to customize your filters and columns.
   - Manage workspace: You have control over the information displayed in your data list using workspaces. Think of a workspace as a combination of particular filters, columns, and sorting. Hover or click the end cap of the workspace ribbon to create & name a workspace, rename, or delete it.

Take a Tour!

For a step-by-step introduction to Recruit’s workspaces, click the Tour button, located at the top, right side of your screen, just below your login name.

Downloading Applicant Data

Academic units want to report on and learn from their past hiring, and Recruit’s method of exposing data make doing so easy. Use filters, columns, and sorting to get at and use the data housed in Recruit and analyze it in Excel.

Recruit will create a comma-delimited file, “JPF#-Applicants-########-####.csv” consisting of all the
data within the workspace 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.

WORKING WITH THE APPLICANT LIST

Mark as Read: This is a way for you to check off applicants that have been reviewed. The feature is available to all users with applicant viewing rights, but the checkmarks are private and not viewable by one another.

1. Locate the applicant or applicants in the list and put a check in the empty box in their row.
2. Then click the "Read" button in the row at the top of the list of names.
3. A green indicator will appear in the applicant’s row.
4. If an application is updated since you marked it as read, an alert icon will cue you.

Hide / Unhide an applicant: Only Analysts, Chairs and Editors have this tool. Recruit never deletes an application but “Hide” comes close. This may be useful if an applicant has applied to the wrong position or applied twice. Use this tool 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.

Add a 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. Even though personal notes can’t be seen by any other user, they 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. And type a note up to 255 characters.
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. Then read the log and close it when you are finished.

Download the applicant’s documents: Click the “Download” link found beneath the applicant name to open a PDF bundle of all an applicant’s documents.

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.

Applicant is not visible to the reviewer (icon): Roll over this icon to quickly determine why that applicant is not being shown to the search committee.

SEND BULK EMAIL

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:

   ![Email Applicants template](image)

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.

**ADD AN APPLICANT**

Occasionally analysts may need to create an application on behalf of someone. Chairs and editors also have this ability.

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

3. Fill in the form: Applicant’s contact information, degree information, current employment, etc.
4. At the bottom of the form, decide to what extent you want the applicant to be involved in their application by checking the boxes provided.

* See Appendix B / Notifications Sent to Applicants: “An application has been submitted on your behalf” and “Access Your Application.”

5. Click one of the buttons to finish adding the applicant.

- **Add & Manage Now**: Choose this button when you are finished with the required information.
- **Add & Add Another**: Choose this when you have more applications you would like to add.
- **Add & Done**: Choose this when you are finished with the required information. You may return to manage the application later.
- **Cancel**: Choose this if you do not want this application to be added.

6. Locate the added applicant in the list and click directly on the name. Verify the information in the “Account access” section.

**STATUSES AND SHORT-LISTING**

One of the most important ways to categorize applicants in terms of workflow and reporting is by keeping the applicant's status up to date. It ensures that the search committee is always aware of an applicant's current state. It ensures accurate diversity reporting. It provides the UC Office of the President the data needed for recruitment and retention reporting.

Only analysts, committee chairs, and editors have the ability to update statuses.

**Updating Applicants’ Statuses**

1. In the applicants list, locate the applicant’s status in the Status column. If you do not see the column, you may need to enable it by using 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. Choose the desired status from the popup menu and click the **Update status** button.

4. If you are selecting **Soft offer extended**, **Proposed candidate**, **Offered**, **Accepted offer**, or **Hired**, you may also enter offer details by clicking on the "Add offer information" link. You'll be able to add multiple appointments if needed too.
• Choose the department.
• 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).
• When updating to **Hired**, the appointment start date and employee ID are required fields.

• 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 Applicants

When applicants want to remove themselves from consideration, their statuses should be updated to “Withdrawn.” If they were previously shortlisted, they will remain on the shortlist for reporting purposes and for compliance with the OFCCP.

MEETS BASIC QUALIFICATIONS

Completed applicants must be marked as “Meets” or “Does Not Meet” the basic qualifications.

- 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).

Only analysts, committee chairs, and editors have the ability to mark the applicants. You’ll assess their applications and determine whether they are qualified for the position or not, based on objective, non-comparative, relevant, and verifiable criteria (such as having a PhD within a required field of study). You may need to revisit the Qualifications section to see what qualifications were established for your recruitment. Contact the campus Diversity office for help if you are unsure about assessing qualifications.

1. Go to the applicants list. You may wish to revisit the instructions, “Filtering the Applicants.”

2. Click directly on the workspace ribbon to quickly change your filters to see Qualified, Unknown, Unqualified, or Entire pool. **Note:** “Qualified” is the default view.
**Unknown**

As soon an applicant applies, they are put into the unknown category (color-coded orange). Use the Unknown view in order to review the applicants’ qualifications and categorize them accordingly.

1. Click the Basic Qualifications filter on the ribbon, select “Unknown” and then **Update**.

![Unknown Applicants Table]

**From the Unknown view:**

1. Find a completed applicant. **Only completed applicants need be evaluated.**

2. Say, for example the basic qualification is a PhD. Find an applicant with a PhD in their Highest Degree column and put a check in the empty box in their row. Or, select multiple names and click the master checkbox at the top of the row.

3. Click the **Meets** or **Does Not Meet** button. This moves the applicant to the appropriate category.

4. **Please note:** Sometimes the qualifications involve more than a highest degree, such as the PhD example given here, in which case you may need to open and review the applicant’s CV to see if the basic qualifications have been met.

**Qualified**

Applicants found in this category (color coded green) are those who have been marked as meeting the basic qualifications. Their responses to the diversity survey will be used in the diversity analysis reports produced later. This is the default view of the applicants page and committee reviewers will conduct their work from this view.

1. Using the Basic Qualifications filter on the ribbon, select “Qualified” and then **Update**.

![Qualified Applicants Table]
From the Qualified view:

1. If you made a mistake, you may move people out of this category. Put a check in the empty box in the applicant's row.
2. Click **Unknown** or **Does Not Meet** to move the applicant out of this category.

**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**

The unqualified category (color coded grey) contains applicants who have been marked as "Does not meet basic qualifications."

1. Using the Basic Qualifications filter on the ribbon, select “Unqualified” and then **Update**.

From the Unqualified view:

1. If you made a mistake, you may move people out of this category. Put a check in the empty box in the applicant’s row.
2. Click **Meets** or **Unknown** to move the applicant out of this category.

**Entire pool**

For the whole picture, use this view (color-coded blue).

1. Using the Basic Qualifications filter on the ribbon, select “Entire pool” and then **Update**.
From the Entire pool view:

1. You can also mark applicants from the entire pool view.
2. Click **Meets, Unknown or Does Not Meet** to move the applicant into the appropriate category.

What does the search committee see? Reviewers will be able to filter by the same color-coded categories. However, reviewers will **not** have the ability to categorize the applicants or change the categories they’re in, as this function is only permitted by analysts, committee chairs, or editors.

**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. Analysts, committee chairs, and editors have the ability to assign disposition reasons. Reviewers can be given this permission by the analyst in the committee-building section of the recruitment.

**Disposition Reasons for qualified applicants:** the reasons justify why qualified applicants don’t move forward in the hiring process.

**Disposition Reasons for unqualified applicants:** the reasons defend why applicants don’t meet the basic qualification and therefore, are not considered as viable candidates for the position.

1. Using the Basic Qualifications filter on the ribbon, select “Qualified”. If no names appear, please return to the section of this manual, **Meets Basic Qualifications** to learn how to mark the qualified applicants. Use the filters again when you’re ready to disposition the unqualified applicants.

2. Check the boxes beside the applicant names that you wish to disposition.

3. With applicants selected, click the button "Assign Reasons" found at the top of both of these pools in the corresponding filtered view.

4. A work screen opens with your selection of names in a list:

5. **To 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. Optionally use the comment field if needed.
6. Click “Done” to return to the respective applicant pool.

7. **To select reason in bulk:** For large pools, it may be faster to mark reasons (or comments) for multiple applicants at once.

   - On the work screen, click this button, found at the top:

   ![Edit disposition reasons for selected applicants]

   - Check the reason(s) from the selection list. This time, the disposition reason(s) will be applied to all checked applicants at once. You may still edit individual applicant’s reasons one-by-one.

---

**EDITING APPLICATIONS**

Only analysts, chairs, and editors have read/write access to manage the applications.

- 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 applications**

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

   ![Steele, Rusty](steele_rusty.png)

2. Use the inline edit 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.”

### Adjusting specializations

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

#### Replacing a document

1. In the Documents section, click the inline “Edit” button beside the name of the document you wish to replace.
2. Click Replace/Remove

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. In the Documents section, 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) and click “Add” to confirm the upload.
Managing an applicant’s references & 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."

**Add a new reference**

1. In the References section, click the “Add reference button.

2. Provide the name of the reference, email, mailing address, affiliation to the applicant, and any other optional information.
3. You may upload the reference’s letter at this time if it’s available.

**Remove a reference**
Remove a reference with caution. Any letter associated with the removed reference will be gone forever. If the application was completed in a review window, removing the reference could pull the application out of consideration.

1. Remove a reference using the “Edit reference” link.

2. Click the “Remove” button.
3. Read the screen warning and confirm when you are ready.

**Edit a reference**
Edit the information about a reference with caution. Editing the reference’s email address could prevent the reference from logging into Recruit.

1. Click the “Edit reference” link.
2. Edit as necessary.
3. Read the screen warning and confirm when you are ready.
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. In the References section, click the link, “Request letter” or “Request again.”

2. 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.

3. 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 letter

If a letter arrives via email or snail mail, the file may be uploaded directly 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.”

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

**Comments** provide the method for reviewers to offer an opinion or discuss the applicants. Comments are displayed publicly to the entire search committee. Management of comments are restricted.

1. Move to the “Comments” section on the applicant’s review page.
   If you see an edit button, the comment belongs to you. If someone’s comment is inappropriate, contact the owner outside of the system and ask the owner to delete it.

**Flags** are intended to be a unique set of labels applied to applicants to help categorize them. An applicant may have multiple flags but each flag must be unique.

1. Move to the “Flags” section on the applicant’s review page.

2. Analysts, chairs, and editors may delete another’s flag by clicking on the “X” beside it.
   **Hint:** Rollover the flag to reveal the owner of the flag.

3. By default, flags are displayed to the rest of the search committee. However analysts, editors, and chairs may privatize flags by adding a new flag and unchecking “Display to reviewers.”

### 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.

![Schedule a visit or seminar form](image)

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

![Add event for visit/seminar](image)

6. Enter the event title, location, and time into the form. 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, “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 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 EEAA, APO & VPAP roles.]

6. * 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, Recruit sends email to approvers that their approval is needed and the submitter receives a copy.

- The email includes a direct link to the approval screen where approvers may download the report, comment, and approve.
- When Recruit detects an approval, the next in line is notified.
- After the last step approves, Recruit sends a notification to the submitter with next steps to take.
- Approvers may choose to opt out of email notifications.
**Additional Email Notifications:** Optionally use the "Notify Approvers" button for further communications along the workflow. For example, use this to: Prod the approver who’s taking too long, warn the pending approvers about what’s coming their way, or highlight a change that previous approvers might need to know about.

All emails include a direct link to the approval screen where approvers may download the report, comment, and approve. When the system detects an approval, the next in line will be notified. See Appendix A, “How Approvers Use Recruit” and Appendix B, “Notifications Sent to Approvers.”

**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. **About this recruitment:** The report’s header contains general information; the recruitment name, the academic year in which the recruitment was created, department and school name, recruitment period, etc.

2. **Search Outcome:** *Candidate hired, No candidates hired, No candidates proposed, or Canceled* will be recorded in this section of the report if the information has been provided when concluding the recruitment.

3. **Proposed candidates:** Any applicant put forth as a potential hire with a status of Proposed Candidate or beyond, will be recorded in this section and their CV will be appended to the report.

4. **Evidences of advertisements:** Verification of ad publication and/or payment will be recorded and appended to the report. Ad sources are documented as part of the Search plan and proof should be uploaded into the Advertisements section of the recruitment.

5. **Letters & Memos:** If uploaded into the Documentation section, any letters or memos will be identified in this section and appended to the report.

6. **Interview materials:** If uploaded into the Documentation section, any interview notes will be identified in this section and appended to the report.

7. **Search and recruitment efforts:** Planned search recruitment efforts and Actual search recruitment efforts will be automatically pulled from the Advertisements section and included in the report.
8. **Applicant Disposition:** Applicants’ names and their corresponding disposition reasons and/or comments will be automatically included in the report. **Disposition reasons are required to produce a search report but this feature may be deactivated for Open/Closed/Final recruitments.**

**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, 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, 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, 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 choose 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)

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

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

Conclude the search

Once the recruitment has run its course, analysts will specify how the recruitment ended so that its history and year-end reports can reflect the outcome.
1. From the Recruitments page, find the recruitment in the list and click on it.

![Recruitment Example](image)

2. From the menu, click **Conclusion**.

Return to the “**Conclusion**” section of this user guide and read the instructions for concluding a search.

**“Inactive”**

**Concluding the search is the new Inactive!** Analysts no longer need to make recruitments inactive. Concluding a search takes care of that for them.

**The legacy "inactive" searches**

Central offices may request that department analysts conclude their legacy inactive searches for reporting or audit purposes.

1. From the Recruitments page, put a checkmark next to "Inactive" in the filters panel. *Make sure no other checkmarks are in the conclusion section of the filter panel.*

![Inactive Filter](image)

Then follow the steps for concluding the search.
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.

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.

1. Click Waivers in the top menu bar.

2. All waivers that you have access to view will be listed in a grid.

Permissions: Who sees what?

- 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.

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

3. Narrow the list or adjust the data using any of the following tools:

- **Search:** Zero in on a particular waiver or attribute using the search box.
- **Columns:** Many columns are sortable. Click directly on a column header for alphanumeric sorting.
- **Filters:** Filters display on the horizontal workspace ribbon, located at the top of the data grid. In the middle of the ribbon, you'll see which filters are active. Hover or click on any filter to quickly update it.
- **Edit workspace:** Use the Edit workspace button to customize your filters and columns.

**Manage workspace:** You have control over the information displayed in your list of waivers using workspaces. Think of a workspace as a combination of particular filters, columns, and sorting. Hover or click the end cap of the workspace ribbon to create & name a workspace, rename, or delete it.

Take a Tour!

For a step-by-step introduction to Recruit’s workspaces, click the Tour button, located at the top, right side of your screen, just below your login name.
Downloading waiver data

Academic units want to report on and learn from their past hiring, and Recruit’s method of exposing data make doing so easy. Use filters, columns, and sorting to get at and use the data housed in Recruit and analyze it in Excel. Click:

![Download as CSV](image)

Recruit will create a comma-delimited file, “waivers-yyymmd-####.csv” consisting of all the data within the workspace 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.

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>
<tr>
<td><strong>Candidate Information</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------</td>
</tr>
<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>Candidate qualifications</td>
<td>Discuss the qualifications required to successfully fill the position, and how the candidate meets those qualifications.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Appointment Information</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<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>-------------------------------</td>
<td>------------------------------------------</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 &quot;Other&quot; 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>Grant information</td>
<td><strong>Note:</strong> The fields for grant information display only when the category is Non-Senate Faculty and Other Academics PI/Co-PI/Leadership Status.</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>
<tr>
<td>Grant documentation</td>
<td>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.</td>
</tr>
<tr>
<td>Justification narrative</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>Waiver duration</td>
<td>How long is the waiver valid? Set an expiration date.</td>
</tr>
<tr>
<td>Expiration type</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>Expiration date</td>
<td>For Time-limited types, type an expiration date or use the date selector. 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>Effective date</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>
<tr>
<td><strong>Previous Waivers Information</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td><strong>Add previous waiver</strong></td>
<td>Provide all information pertaining to previous waiver(s) for the candidate or the position. If there is any paper documentation of a waiver, it should be scanned and uploaded to the waiver history documentation field. The information appears on the waiver PDF with any uploaded documentation appended.</td>
</tr>
<tr>
<td><strong>Search waiver request (SRW) or other reference number.</strong></td>
<td>If the waiver had been entered into the Recruit system, include the waiver's reference number (ex: SWR00001). Otherwise, provide an alternate identifying number to help with tracking.</td>
</tr>
<tr>
<td><strong>Candidate name</strong></td>
<td>Place the name of the candidate in this field.</td>
</tr>
<tr>
<td><strong>Position</strong></td>
<td>If known, include the position or working title.</td>
</tr>
<tr>
<td><strong>Department</strong></td>
<td>This is the department the candidate was waived into.</td>
</tr>
<tr>
<td><strong>Search waiver category</strong></td>
<td>Select from the dropdown menu (Senate, Non-Senate, or Other).</td>
</tr>
<tr>
<td><strong>Was the waiver approved?</strong></td>
<td>Select “Yes” or “No” from the dropdown list.</td>
</tr>
<tr>
<td><strong>Effective date</strong></td>
<td>Enter the effective date of the previous waiver in this field.</td>
</tr>
<tr>
<td><strong>Expiration date</strong></td>
<td>Enter the expiration date of the previous waiver in this field.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Documentation Section</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supporting Documents</strong></td>
<td>Browse and upload one or more additional documents that helps supports the waiver 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><strong>Description of uploaded file</strong></td>
<td>Provide a short description of the supporting document.</td>
</tr>
<tr>
<td><strong>Comment</strong></td>
<td>If needed, leave a comment about the document.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Tools Section: Activity Log and Delete Waiver</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Activity log</strong></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><strong>Delete waiver</strong></td>
<td>In the event that a search waiver was created in error, analysts can delete their search waiver.</td>
</tr>
</tbody>
</table>
SEARCH WAIVER APPROVALS

Waiver approvals work similarly to the other types of approvals in 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, 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 think the search waiver is ready, click the link in the status bar, Submit it for approval. [At UCR: The Recruit Administrators will pre-assign the approval workflow per college/school/unit.]
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.

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.

[At UCR: Mandatory approvers are pre-assigned by the Administrators. Contact aprecruit@ucr.edu if you need assistance.]

**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, 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 Recruit detects an approval, the next in line is notified.
- After the last step approves, 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**

Analysts can make changes to the approval 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.

[At UCR: This may be assigned by the Recruit Analyst with the exception of EEAA, APO & VPAP roles.]
2. Add additional approver 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.

**Add step**

**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.

**Reorder steps**

[At UCR: Diversity Office and APO roles cannot be modified. Contact aprecruit@ucr.edu if you need assistance.]

**Final Authority / Final Decision**

The last required person in the approval 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 authority approvers will be able to leave a final decision 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:
- When the final authority approves, and all prior steps have also been approved, an email is sent to the analyst to that effect.
- When the final authority declines the waiver, an email is 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:
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.

Concluded waivers can be reopened, which will make them visible by default on the waivers grid as well as in 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. 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 your hire, contact your Recruit administrator or the campus central Academic Personnel Office.

1. Click Exemptions in the top menu bar.
2. All exemptions that you have access to will be listed in a grid view.

Permissions: Who sees what?
- 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.

Note: Exemptions are associated with a unique search exemption request number (EXR). While the EXR# relates to a single candidate, a candidate could potentially have more than one exemption in the system.

3. Narrow the list or adjust the data using any of the following tools:
   - **Search:** Zero in on a particular exemption or attribute using the search box.
   - **Columns:** Many columns are sortable. Click directly on a column header for alphanumerical sorting.
   - **Filters:** Filters display on the horizontal workspace ribbon, located at the top of the data grid. In the middle of the ribbon, you'll see which filters are active. Hover or click on any filter to quickly update it.
   - **Edit workspace:** Use the *Edit workspace* button to customize your filters and columns.
   - **Manage workspace:** You have control over the information displayed in your list of waivers using *workspaces*. Think of a workspace as a combination of particular filters, columns, and sorting. Hover or click the end cap of the workspace ribbon to create & name a workspace, rename, or delete it.

Take a Tour!

For a step-by-step introduction to Recruit’s workspaces, click the Tour button, located at the top, right side of your screen, just below your login name.
**Downloading exemption data**

Academic units want to report on and learn from their past hiring, and Recruit’s method of exposing data make doing so easy. Use filters, columns, and sorting to get at and use the data housed in Recruit and analyze it in Excel. Click:

![Download as CSV](image)

Recruit will create a comma-delimited file, “exemptions-yyyymmdd-###.csv” consisting of all the data within the workspace 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.

---

**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 &quot;Other&quot; 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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Candidate Section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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 Current, Past, or Retired UC employee and provide the location and employee ID number if asked. Select Never a UC employee or Unknown if applicable.</td>
</tr>
<tr>
<td>Appointment Section</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</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>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Additional Details section</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
</tbody>
</table>

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

Exemption approvals work similarly to the other types of approvals in 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, 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 a 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.

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.

Specify 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, 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 Recruit detects an approval, the next in line is notified.
- After the last step approves, 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:
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.

**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.

2. To conclude the exemption, click on the button "Conclude exemption" and confirm.

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

HOW APPLICANTS USE RECRUIT

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

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

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

![Image of My Information section]

**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.

![Image of My Files section]

**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.

Some applicants may use a third-party dossier service, such as Interfolio for their reference letters. In these cases, the applicant must provide the dossier service email address instead of the reference's personal email address in the My References section. Once “Request letter of recommendation” is pressed, the dossier service will be sent the request for that letter and will be able to upload it.
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 RECRUIT

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

**Uploading a letter of reference**

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

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 Recruit but will be notified that they have been submitted.
   - Recruit automatically sends a message thanking the Reference for their contribution. This email is editable by the Analyst when they are configuring the recruitment for online applicant management.
HOW APPROVERS USE RECRUIT

These instructions are for any faculty or staff who are named as approvers for a SEARCH PLAN, APPLICANT POOL REPORT, SHORTLIST REPORT, SEARCH REPORT, WAIVER, OR EXEMPTION.

There are two quick ways to reach the approval screen:

1. **Look for an email from 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 Recruit with a direct link given in the email.
   - The approval screen appears where the user will view, approve, or comment on the item.
   - Approvers may opt-out of future notifications using the link in the email.

2. **Or bypass the email and log into Recruit directly**
   - Navigate to [https://aprecruit.ucr.edu/](https://aprecruit.ucr.edu/) and click “UC Riverside Faculty & Administrators.”
   - Once logged in, the Home screen will display the link to any pending approvals:

   ![Image](image.png)

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

   ![Image](image.png)

   **The approval request screen:**

   ![Image](image.png)

   **Download button:** opens a PDF of the plan or report.

   **Leave a comment button:** If you find that the report is deficient, leave a comment for the submitter. The comment is recorded in the comment section. Optionally, check the box “Mark approval as read” on the comments screen and Recruit will place an alert on your approval dashboard when the item is changed, queuing you to review it again. Your comment also triggers an email to the report submitter, allowing the submitter to better monitor the comments and make any necessary modifications.
Approve button: to approve the plan or report.
> Approvers: The expanded chevron (>) displays the identities of any other approvers named in the workflow. The arrow indicates who is the next person in line to approve. Roll over the icons with your mouse to see the approval date and time.
> Comments: expand the comments arrow to read comments left by others.

HOW COMMITTEE REVIEWERS USE RECRUIT

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

A 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

Many of the same tools that analysts use are available to Reviewers. See previous section, “More 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:

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).

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

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

6. **Public Comments** — Comments are displayed to the rest of the search committee. They should be limited to those that are job-related, as all comments become part of the electronic record.
   - Comments are entered in the box provided and by clicking **Add Comment**.
   - Owner’s names and a time-stamp appear to others below the comment.
   - One comment is permitted per applicant. You may return and add more text, but it is still considered one comment.
   - Owners may remove their comment by clicking **Edit Comment** (and erasing it).
   - There is no limit on the number of characters permitted in the comment field.
7. **Flags** — Flags are intended to be a unique set of labels applied to applicants to help categorize them.  
- Flags are entered in the box provide and by clicking **Add Flag**.  
- Flag-owner’s names display on rollover.  
- 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.
Appendix B

NOTIFICATIONS SENT TO APPLICANTS

1. Application Started
   - Automatically sent to applicants when they start their application.
   - Thanks the applicant for applying.
   - Includes the application edit deadline.
   - If the recruitment includes review dates ("IRD"), the message includes “To ensure full consideration, complete by [review date].”
   - Tracked in the 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.
   [Link to contact form]

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

   UC Recruit Team
   University of California, XYZ

2. Application Complete
   - Automatically sent to applicants a few hours after they complete their application.
   - Will be suppressed if applicant was manually completed by the hiring department’s analyst.
   - Includes the application edit deadline.
   - Includes a reminder to take the diversity survey if the system detects it has not been taken.
   - Tracked in the 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.

[Link to Diversity Survey]

Thank you for successfully submitting your application!

Application Details

Position Name: Adolescent Psychology Assistant Professor
Department: Psychology & Social Behavior
School: School of Social Ecology
Username: [Applicant’s username]
Status: Submitted
Login link: [Link to applicant login]

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

Questions?

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

[Link to contact form]

UC Recruit Team
University of California, XYZ

---

3. Application Confirmation and Survey Request
- Automatically sent to all completed applicants who have not taken the survey.
- Sent 4-5 days before the edit deadline (a final date or review date).
- Tracked in the applicant's log.

4. Application Completion Deadline Approaching
- Automatically sent to incomplete applicants approximately 3 days before the edit deadline (a final date or review date).
- Tracked in the applicant's log.

5. Application has been submitted on your behalf
- Initiated by the analyst, committee chair, or committee editor from the Add Applicant tool.
- May be sent only once.
- Informs the applicant that an application has been created on their behalf and they have been added to the pool.
- Tracked in the 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, Irvine.

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, committee chair, or committee editor from the Add Applicant tool.
- May be sent multiple times.
- Informs the applicant that an application has been created on their behalf and they’ve been added into the pool.
- Includes instructions for the applicant on how to access their application.
- Includes a 72-hour expire link.
- Tracked the 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
- Existing applicants are informed of an additional requisite.
- Using the Edit Document Requirements tool, the analyst is the only user who may establish the additional requisite and initiate the email.
- Custom text may be provided.
- The email instructs applicants to log in and provide the new, optional document.
- Tracked in the applicant's log.

8. Password Reset
- Initiated by applicant using “Forgot your password?” tool on the Apply page.
- Provides instructions to reset it.
- Includes a 72-hour expire link.

9. Notify applicants in bulk email correspondences (Subject line is customizable)
- Initiated by the analyst, committee chair, or committee editor by using the Send Bulk Email tool.
- Fully customizable text.
- Sent only to selected applicants.
- Optional variables may be inserted into body that include: ApplicantFirstNameLastName, UserName, CompletionDate, RecruitmentName, ApplicantAddress, RecruitmentAddress, ContactAddress.
- Tracked in the applicant's log.

NOTIFICATIONS SENT TO REFERENCES

1. Letter of Reference Requested
- Initiated by applicant as part of application process when reference requirement is “Letters of recommendation.”
- Asks the reference to log in and submit a letter.
- UC Confidentiality Statement is included.
- Applicant may personalize their message.
- Applicant can re-send the request after their review date and up until the recruitment’s final date.
- Tracked in the applicant's log.
2. Request for Letter of Reference for <applicant's name>:
- Initiated by the 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 requirement is “Contact information only.”
- Analyst, chair or editor may re-send at any time.
- Tracked in the 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 proceeding or other situation in which the source of confidential information is sought, the University does its utmost to protect the identity of such sources.

Thank you for your time.

[Analyst signature]
University of California, XYZ

3. Thank you for your contribution
- Automatically sent once the reference uploads the letter.
- Confirms and thanks the reference for providing a letter.
- Informs reference that the letter could become part of the applicant's appointment file if hired.

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
- (for recruitment plans, recruitment reports, search waivers, or exemptions)
- Automatically sent to approvers who are next in line in the workflow.
- Analyst’s are cc’d.
- 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 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.

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
• (for Applicant Pool reports and Shortlist reports)
• If an Applicant pool or Shortlist report is updated and replaced while in flight, any previous approver is notified that there has been an update.

Note: 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)
• (for recruitment plans, recruitment reports, search waivers, or exemptions)
• Initiated by any approver from the Notify Approvers button from the approval request screen.
• Fully customizable text.
Can be sent to Previous approver, Current approver, Pending approver, or All approvers listed in the workflow.

NOTIFICATIONS SENT TO ANALYSTS

1. Applicant Pool Report Needed
• (for 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
• (for recruitment plans, recruitment reports, search waivers, or 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. **Approved**
   - (for recruitment plans, recruitment reports, search waivers, or 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. **Declined**
   - (for search waivers or 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. **Recruitment deleted, Waiver deleted, or Exemption deleted**
   - Automatically sent to the analyst when a Recruit administrator deletes a recruitment, search waiver or exemption.
   - Tracked in activity logs.

6. **Please conclude your search waiver or Please conclude your search exemption**
   - 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 are suppressed if the waiver (or exemption) has been concluded.

7. **Search waiver expiration**
   - A notice is automatically sent when a waiver is about to expire.
   - Sent for time-limited types only.
   - The Dean's Analyst is cc’d.
   - By default, notices are sent 6 months and 2 months before the expiration date. (Check with your campus administrator, as this default may be different)

---

**EMAILS SENT TO 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 RECRUIT’S END-USERS

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

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

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

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

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

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

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

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

SPECIAL TOOLS FOR RECRUIT ADMINISTRATORS

1. Click Admin in the top menu bar:

2. The suite of available administrative tools depends on your role/access rights. If you don’t have these tools, your role is not set to Recruit Administrator.
Find Applicants

Search for anyone who has ever had an application in Recruit.

Find References

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

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

PII Audit

Files uploaded to Recruit are periodically scanned by an automated system and flagged if the file seems to contain Personally Identifiable Information (PII). This tool allows authorized users to review flagged files for PII, then replace or safelist them.

PII is any data that could potentially identify a specific individual and presents an unacceptable security risk. Social Security numbers, driver’s license and other government identification numbers are some examples.

If you don’t have access to this tool, your role is not a Recruit Administrator. Administrators may also assign the PII Auditor role using the Manage User Roles admin tool. Please remember, the number of individuals with access to this tool should be kept at a strict minimum.
Checking files for PII

1. Set the filters to show “Flagged.
2. In the list of files, click a filename to open it.
3. Look over the file. Verify whether or not there are social security numbers or other strings of numbers that identify bank accounts or passport IDs.

False positives: Even automatic scans aren’t perfect. If you find no PII, this is a false positive.

1. When no PII is found, return to the PII tool and click “Safelist.”
2. You’ll find this record when you filter for “Safelisted.”
3. Safelisted files won’t be scanned again.

Positive PII finds: When PII is found, redact the information and replace the file.

1. Click the filename to open it.
2. Download it.
3. Redact the PII and save the file. You may want to append the word “redacted” to the new filename.
4. Return and click “Replace.”
5. Browse for the redacted file and upload it.

- You’ll find this record if you filter for “Replaced.”
- The new file will be included in the next automated scan.
- The original file is non-recoverable.
- No notification will be sent to the original owner of the file about this redaction.
- If this was an applicant’s document, the applicant’s status won’t be affected.
- Remember to treat these files as you do all sensitive files and remove them from your computer when you’re done.

Redaction methods: When redacting files, be sure that you are removing the data and not simply blacking it out. Blacking out is not secure; as it creates a layer, merely covering the data with an image that can be easily removed.
• **The manual way:** You can, of course, print offending files and black out data by hand, scanning and uploading files afterward. While time consuming, it is effective.

• **3rd party software redaction tools:** Here are some secure tools:
  o Adobe Acrobat Pro (Mac and Windows)
  o Foxit PhantomPDF Business (Windows)

**Note:** While gender and ethnicity affiliation are still sensitive data, it can’t be used to file someone’s taxes or apply for a credit card. For example, say an applicant begins her cover letter with, “As an older woman of color....” In this example, the PII security scans will NOT flag the document based on such exposed information and the file will be marked “Passed.”

**Proxy as User**

Assume the role of any user in Recruit.
1. Search by name, email address, or campus id.
2. Click “Proxy as User.”
3. Use caution! When you are proxied as another user, any changes will affect their view.

**Create Fake Recruitment**

**This tool is only available on the 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 stages of completion. *Administrator* or *Trainer* access is required for this tool.

1. Log into your campus 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 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.
Committee membership audit

There are several business cases for viewing committee membership statistics. Examples: check when committees re-use the same member, or ensure people are not being overburdened, or check how many departments are using members from like departments.

1. Click on “Committee membership audit” in the support tools. (If you do not have this, your role is not set to Recruit Administrator.)

2. Narrow the list or adjust the data using any of the following tools:
   - **Search**: Zero in on a particular name, employee ID, role etc. using the search box.
   - **Sort the columns**: Many columns are sortable. Click directly on a column header for alphanumeric sorting.
   - **Filters**: Filters display on the horizontal workspace ribbon, located at the top of the data grid. In the middle of the ribbon, you'll see which filters are active. Hover or click on any filter to quickly update it.
   - **Edit workspace**: Use the Edit workspace button to customize your filters and columns.

3. You may download the data that is a result of the filters and columns you’ve set up in your workspace. Click the button, **Download as CSV** and to open and analyze in Excel.

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.

Manage User Roles

This tool manages Recruit users and their roles.

Under Shibboleth, Recruit is fed user directory data so all faculty and staff (including student employees) will have access to Recruit because they are part of a nightly data feed. However, they do
not have the ability to do or see anything in Recruit until they have been given a role. This tool enables you assign roles, edit existing roles, and remove user access.

1. Click the button, "Add Role for User."

2. Search for the person by name, email or UCRNetID.
3. Select a user role from the drop down menu.
4. Choose a resource type. Choices are: Tool, School, Department, Recruitment, Waiver, Exemption, or Committee.
5. Click “Add user role” 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.

Manage Users

This tool makes it possible to introduce a new user that is independent of the directory feed. Note to other campuses using Recruit: This tool is only available if Recruit is configured on your campus for local authentication. Under Shibboleth, Recruit looks for a data feed of the campus’ directory, in which case this tool would be unavailable in order to prevent overwriting data.

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 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:
   Select "All" to have a catchall workflow when the other workflows you've designed won't fit for whatever reason.

4. Choose to apply this workflow to specific schools or choose All Schools to apply globally.
5. For even more granularity, choose condition based on Title Codes.

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

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

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

9. Click "Add Step" when finished adding the steps. The workflow will be applied to all future approval requests that meet these 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:** You may restrict 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.

![Diagram showing restrictions and roles]

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.

### Waivers Configuration

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.

![Diagram showing search waiver categories]

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

![Diagram showing Senate and Non-Senate 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. Save changes. Once a category is in use, 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**

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 to Recruit administrators and displays which features are enabled on the Recruit site. If a feature is not available or a feature needs to be deactivated, the administrator should contact the UCIrvine Recruit development team.
ADMINISTRATIVE REPORTS

Reports is a central location where a user’s saved workspaces are stored and can be managed.

Click the Reports tab in the top menu bar.

*Note:* some roles, for example review committee and approvers, won’t have this tab.

- The gray “cards” are pre-built report templates, provided by the system.
- These are based on commonly used UCOP reports or for applicant diversity data analysis.
- *Note:* department and school analysts will not have these templates.

- Saved workspaces are shown on blue cards.
- Cards are grouped by their respective grids from where their data is drawn.
- View these workspaces or download their corresponding .csv to build a spreadsheet.

As your reporting needs grow and change, add new workspaces or alter your existing workspaces and templates. Your additions and changes will be reflected here, on the Reports page.