NOT YET BRANDED FOR UC DAVIS

<mark>**UC Davis Recruit Help Desk:**
ap-recruit@ucdavis.edu</mark>

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 workflow** from early approvals, opening recruitments, applications, reference gathering, reviewing by the search committee and, finally, selecting a hired candidate. Recruit also supports hiring through **waivers and exemptions**. Reports are built-in to the system, providing for an easy way to **create the reports** that the University of California's Office of the President uses to ensure all campuses meet their requirements as equal opportunity employers. Recruit also ensures the **security and integrity** of all applicant, reference and related recruitment data.

HOW TO USE THIS MANUAL

The purpose of this manual is to document RECRUIT's functionality in order to aid Recruit Administrators and for trainers to help other users of the system. Permission is granted to copy, distribute and/or modify this document for your educational use. Please refer to the UC Recruit Project Website at **http://sites.uci.edu/ucrecruit** for recent product updates that may not be included in this edition of the guide.

- 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
Microsoft Edge

How to Log into Recruit

UC Recruit is a shared application among all eleven UC campuses. To access UC Recruit, you must have a campus ID. This varies from campus-to-campus. At UC IRVINE for example, a unique UCInetID is automatically generated for all faculty and staff when they enter the payroll system, which the owner will activate **(https://ucinetid.service.uci.edu/activate/cgi-bin/activate.cgi)**

For UC Irvine users, log into to Recruit here — **https://recruit.ap.uci.edu/**

For all other UC campus users, check with your Academic Personnel office for login instructions.
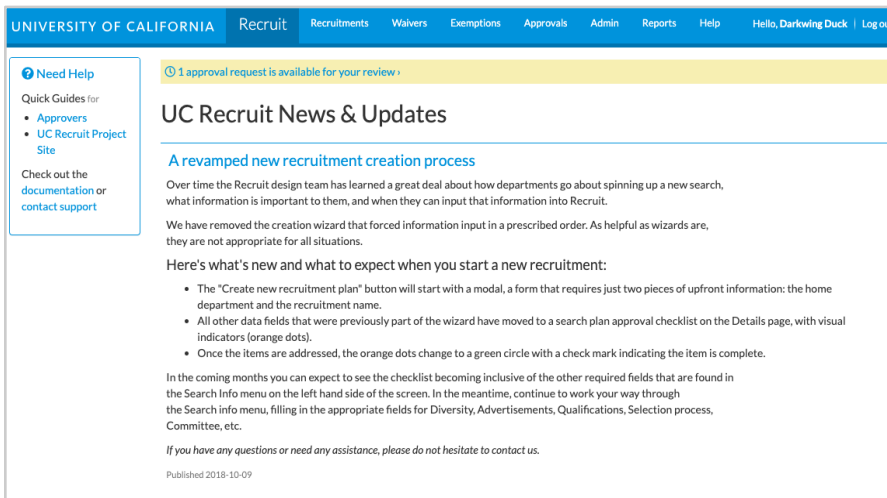
1. On Recruit's home page, click on the "UC Faculty & Administrators" link.

2. When prompted, authenticate with your campus ID and password.
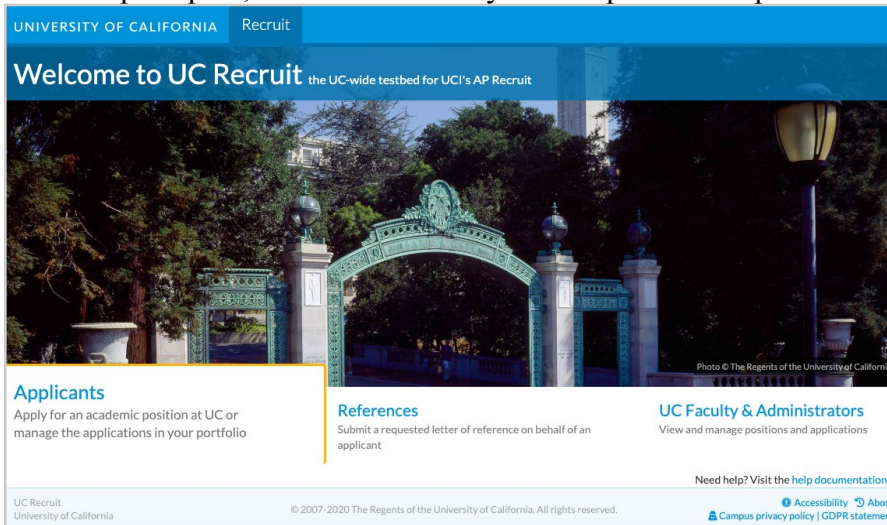
The News & Updates Page

The Homepage with news and updates is the same for all faculty and administrator roles.

You'll know you are logged into Recruit by looking to the right on the menu bar. This is also how users log out of the system.

The top menu choices will differ depending on the user's role in Recruit. If you only see the News & Updates page, you have not been assigned any role and should contact your Academic Personnel office for help.

User Roles in Recruit

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

the recruitment.

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

Recruit Administrators are the primary supporters for all other users and have the most Admin tool access and all the access rights of the roles listed below.

Recruit User Managers act as gatekeepers, assigning, editing and removing user roles for others.

Department Analysts administer all aspects of the recruitment from start to finish. They create the recruitments for their departments, complete the search plan, publish the recruitment, assign search committee roles, manage the applicant files and 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. They can mark applicants as "qualified" or "unqualified", send bulk email to applicants, update applicant statuses, etc. Chairs also may add/edit portions of a recruitment's information — information that is part of the Search Plan and/or Search Report.

Committee Editors have the same access rights as Committee Chairs.

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

Equity Advisors This role is often 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.If they need access to the applicants' self-reported gender, race, veteran's status and disability status, the user will need to contact their campus administrators.

Central AP Analysts roles are generally assigned to those in the central office who oversee academic personnel activities for the campus. When assigned to the Recruit tool, they have read-access to all open or completed recruitments, waivers, and exemptions.

Diversity Analysts roles are generally assigned to administrators who oversee the campus equity and fair hiring practices, but can be assigned on a school or department level. 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. If they need access to the applicants' self-reported gender, race, veteran's status and disability status, they will need to contact their campus administrators.

Gender Identity Data Analysts roles are generally assigned to those who need access to P4 data. This role accesses Gender Identity data in the Applicants and All Applications grid for applicants you can already see. It cannot stand alone, and will need to be combined with a Recruit Analyst or an administrative role.

Sexual Orientation Data Analysts roles are generally assigned to those who need access to P4 data. This role accesses Sexual Orientation data in the Applicants and All Applications grid for

applicants you can already see. It cannot stand alone, and will need to be combined with a Recruit Analyst or an administrative role.

Race/Ethnicity Data Analysts roles are generally assigned to those who need access to P4 data. This role accesses Ethnicity and Ethnicity answers data in the Applicants and All Applications grid for applicants you can already see. Similar to Gender Identity and Sexual Orientation Data Analyst roles, it cannot stand alone.

Disability Status Data Analysts roles are generally assigned to those who need access to P4 data. This role accesses Disability status data in the Applicants and All Applications grid for applicants you can already see. It cannot stand alone, and will need to be combined with a Recruit Analyst or an administrative role.

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, Associate Vice Chancellor, Executive Vice Chancellor, Chancellor.

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.

## WORKSPACES: RECRUIT'S FILTERS, COLUMNS, AND SORTING

Controls such as filters, columns, and sorting help you find and organize the needle-in the-haystack information on content rich pages, or **grids**.

Grids appear everywhere in Recruit: on the recruitments page, the applicants list, the all applications page, for waivers and exemptions, the approvals dashboard, and in several administrator tools.

This section explains how to use workspaces to customize your filters, columns, and sort settings. Optionally, you may name your workspaces and then call them up to use for a particular task or query in the future.

Adjusting the Workspace from the Grid

- Filters display on a horizontal band at the top of a grid. This is the **"Workspace ribbon."** In the middle of the ribbon, you'll see which filters are active. Hover over and click "Remove" to eliminate the filter completely. Or adjust its attributes and click "Update."
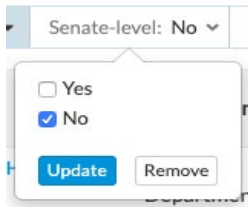
- The spinner indicates the **grid** is adjusting.
- Organize columns by dragging the vertical bars on the column header.
- The column being sorted will be highlighted (a darker color).
- Most columns are sortable, and this is indicated by the double arrows beside the column header. Click the arrows to reverse the sort order.
- Shift-click another column for multiple column sorting. The precedence of sorted columns will be indicated by the numbers beside the arrows.
- When any change is made to the filters or columns, the **ribbon** will indicate that this is an "Unsaved" **workspace**.

Reset to Default: Seeing unexpected results or just want to start anew? Hover over the end cap and choose "Default workspace."
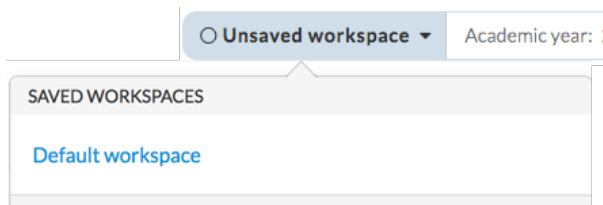
Filters & Columns Management

To add and manage filters and columns and for more complex sorting, click the button, **Edit filters & columns,** found on the right side of the ribbon.
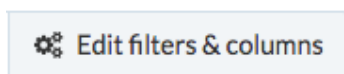
The workspace editor opens:

- Use the **Filters** tab to add and manage more filters.
- Use the **Columns** tab to add and manage more columns.
- Use the **Sort** tab for multiple or complex sorting.

Filters Editing

- On the **Filters** tab, click the plus symbol 🔵 to add a new filter. Or, to subtract a filter, click 🗑 **Remove**
- There are many filters to choose from, so type in a key word in the "Search for a filter" field if you don't find what you're looking for.
- Adjust the attributes of the filters.
- Whatever the change, scroll down and click **Update** at the bottom of the modal.

Columns Editing

- Click the **Columns** tab in the workspace editor.
- To add a column to your workspace, drag it from the **Hidden** section to the **Shown** section. To remove a column from your workspace, drag it from the **Shown** section to the **Hidden** section.
- You can also drag columns to rearrange the order in which they appear.
- There are many columns to choose from, so type in a key word in the "Search for a column" field if you don't find what you're looking for.
- Whatever the change, scroll down and click **Update** at the bottom of the modal.

Sort Editing

- Click the **Sort** tab in the workspace editor.
- Click the "Add sort" link and click the name of a column to sort.
- You can slide them around for priority.
- You can also reverse their sorted order.
- Whatever the change, scroll down and click **Update** at the bottom of the modal.

Hidden sorted columns

It makes most sense to be sure you've added the column to the grid before you attempt to sort it. But it IS possible to sort hidden columns. When you do so, Recruit tells you about it, with this indicator:
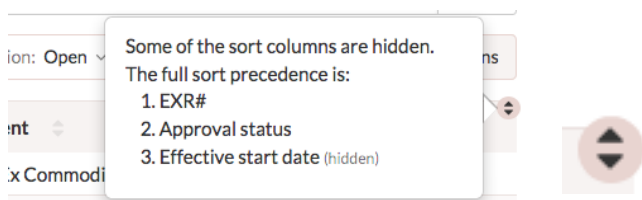
Saving your workspace

Save your queries if you want to call up the same settings later.

1. Hover over the end cap on the workspace ribbon until the popover appears.
2. Give your workspace a name.
3. Click the "Add workspace" button below it.
4. The end cap will reflect the name.
5. If you make a change to your named workspace, the popover will warn you.

Rename or remove saved workspaces

To rename:

1. Hover over the end cap on the workspace ribbon as before.
2. Find the name of the workspace you wish to rename.
3. Place your cursor in the box below and begin typing the new name.
4. Click the "Rename" button below it. The end cap will reflect the revised name.

To remove:

1. Hover over the end cap and click the delete button. You'll be asked to confirm.

> Year-End Reporting   🗑 Delete

   Note*:* The Default workspace is locked and can't be renamed or removed.

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Part 1: Recruitments

A<small>LL</small> <small>RECRUITMENTS'</small> <small>APPLICATIONS</small>

The "All applications" link at the top of the recruitments page allows users to locate any particular applicant in any of the recruitments within their scope.
Recruit's carefully designed scope level reveals only the data a particular user's role is privy to see. For example, demographic information is shown only to Diversity Analysts, Equity advisors, and Recruit admins.

1. At the top of the recruitments page, click the link, "All applications".
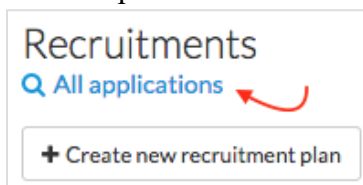
2. Adjust the information using the workspace ribbon across the top of the grid.

Starting a Search

C<small>REATE A NEW RECRUITMENT</small>

1. Click **Recruitments** in the top menu.
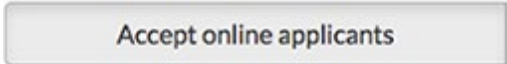
2. Click the button, "Create new recruitment plan."

This opens a modal, a form that requires just three pieces of upfront information:

Fields	Description
Recruitment name	Give it a unique, descriptive name, something that matches your ad copy and also incorporates your unit's name. This is particularly helpful for the applicant who may be applying to more than one "Assistant Professor" position, e.g. *Assistant Professor in Experimental Condensed Matter, Department of Physics*
Home department	Choose from the dropdown list. This department will manage the recruitment process.

Accept applicants?	Keep the default button selected, "Accept Online Applicants". This will give you the full functionality of Recruit. Accept online applicants

3. When done, click the "Create recruitment plan" button to close the modal and the recruitment becomes a "Draft".

Create recruitment plan

About "Diversity Survey Only" recruitments

When you choose not to accept applicants, it means:

- The hiring unit intends to collect and manage the applicant pool via the legacy paper process or by an outside job application service apart from the University of California sanctioned UC Recruit.
- It will be the responsibility of the analyst in charge of the search to distribute the survey on diversity to all applicants without the help of distribution and reporting tools within the system.

This type of recruitment is **not recommended**. Check with your Academic Personnel Office if you are considering this.

Note: If "Demographic survey Only" was mistakenly created, you will still be able to configure your recruitment for online applications until the Search plan is approved.

PROCESSING A SEARCH PLAN

Your draft recruitment is confirmed in the status row on the top of any Search Info page.

1. Expand the checklist to see what is missing. The Recruit Administrator manages the checklist via the Recruitment checkpoints admin tool.

DRAFT ● Fill out the remaining required fields before submitting the search plan for approval. See checklist
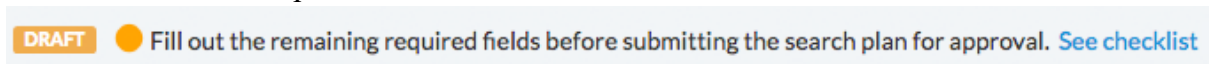
- ○ Solid orange dots indicate when information is needed.
- ○ Green dots with check marks indicate when information is complete.

○ Click the corresponding "Add now" links to enter the information.
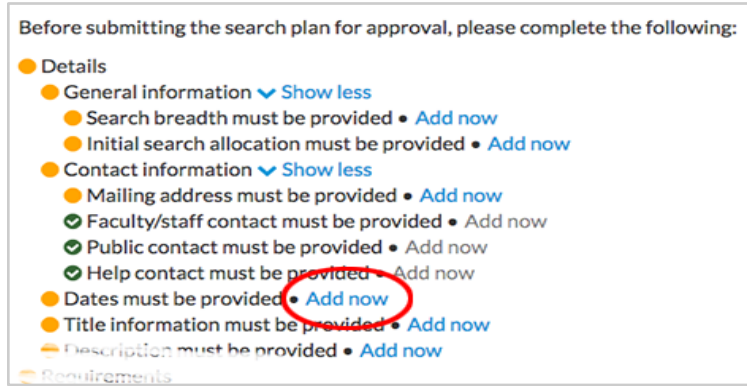
2. Then work your way through the menu tabs on the left of the screen, completing all required fields.
3. Note that any field with the green Ad badge will be publicly viewable once the recruitment ad is published.

Information to add to a Search plan (alphabetical list)

Fields	Description
Anticipated start	The approximate time frame that the hired candidate would be expected to start the position.
Approved search area	The FTE identifier. e.g. Medieval Studies
Dates	Choose which format of recruitment you wish to create, an IRD/Open until filled or an Open/Close/Final.
Description	Add a description in the text field provided. The description appears to applicants on the apply page and the wording should be the same or similar to that used in all advertisements. This field offers Markdown syntax, a format for writing for the Web that makes it possible for you to use bold, italics, headers, links, and other formatting elements. The description will be locked once the Search plan is approved.
Faculty/staff contact	Used by the search committee, other analysts, and the system to contact you about this recruitment. It is not visible to applicants.

Fields of Study	Select at least one broad field of study that best fits the recruitment; selected fields of study will generate availability data that will help evaluate the diversity of the applicant pool, a core feature of Recruit.
Help contact	Applicant questions submitted through the "Contact us" form will go here. Neither delivery point nor name will be exposed to applicants using the form.
Information Links	This optional field is the Web address where more information can be found about this recruitment. And for applicants who are applying online for tenured positions, this link will be available to them on Recruit's apply page. Analysts can choose a label from the list, or create their own by typing into the dropdown box.
Initial search allocation	Choose whether this position is newly allocated or if it is being re-listed from a previous academic year.
Job Location	An optional field for the city and state where the hiree will work. This information shows up in the Search plans and Search reports, as well as in the columns on the recruitment grid.
Mailing address	The mailing address that applicants may use.
Name	The name of the recruitment that applicants will see when they apply.
Percent time	The appointment percentage for the advertised position.
Planned search recruitment efforts	Describe all planned efforts to reach a broad and inclusive applicant pool.
Position duration	The expected appointment duration for the advertised position.
Position title	The human readable title of the position, i.e. what will appear on a business card, free of UCPath jargon.

Public contact	Used when Recruit sends email to References or Applicants.
Rank/Step	Optionally track the rank/step for the recruitment. This information shows up in Search plans and Search reports, as well as in new columns on the recruitment grid.
Reference process explanation	Details for applicants about reference collection and usage.
Requirements	What the applicants will need to provide in the way of references and documents.
Salary control number	When a new position is funded, it is given a salary control number. This field allows that number to be tracked along with the recruitment to help with record keeping.
Salary range	This information shows up in Search plans and Search reports.
Search breadth	Choose whether this is an open or a specialized search. An open search is general, and a specialized search is one that is targeted.
Standard text	If the campus administrator chose to make this visible to applicants, then this admin-customized text will be appended to recruitments and will be visible to applicants.
Title information	The Title code field permits an unlimited number of codes to associate with the recruitment. Academic Title Codes map directly to salary scales and also determine the availability data used in applicant pool diversity reporting. The section is locked once the Search plan is approved to ensure that the codes are not retroactively changed to suit a particular candidate.

DATES FORMATS

Use the Search plan submission checklist or the inline edit button on the recruitment's Details page to set up dates. All new recruitments will automatically use the Review windows submission process.

Review Windows

Committee reviewers evaluate applications that are complete and submitted by the applicant before the advertised review date. Set the open date, initial review date (IRD), and final date during the Search plan phase; you may add subsequent review dates later if no suitable candidate has been found, or when deemed necessary by the committee. Additional review dates are clearly stated to applicants on the Apply page.

This process supports long-running searches in which pools of applicants are gathered and evaluated separately at different times, "Open until filled" recruitments, and allows for flexibility in extending the final date if the position is not filled.

Key features of Review windows:

- The Open date is the date that applicants can begin applying. The Open date locks when the first applicant applies.
- The Initial review date is the day the committee will gather to look at applications. The initial review date locks when the first applicant applies.
- The final date is the last date that applicants can submit an application. Final dates do not lock.
- The Analyst can add review dates once the current review date has passed (11:59PM PST), thus extending the search
- Review dates created using a past date are hidden from applicants.
- When an applicant completes and submits their application, they'll no longer be able to modify their application. At that point their application is in the hands of the committee and can no longer be changed.
- Analysts can still manage application materials at any time. Nothing the analyst does, including removing required documents or references, will change the application's review window.
- The final date is not a review date! Applicants who miss the review date(s) will still be able to apply and work on their application until the final date, but it will only be seen by reviewers if another review date is added and the applicant submits.
- Search reports may be created after any review date has passed
- Recruitment application duration must fall within campus policy. If a duration outside of policy is needed, please contact the campus administrator.

There are two legacy submission processes that can no longer be selected. However, recruitments that have already been posted using these submission processes can continue to be managed until they close:

IRD/Open until filled

The analyst sets the open date, initial review date (IRD), and final date during the Search plan phase and adds subsequent review dates later if no suitable candidate has been found or when deemed necessary by the committee. The IRD and additional review dates are clearly stated to applicants on the Apply page. Committee reviewers evaluate applications that are completed within review date windows.

- Choose this format for a long-running search in which pools of applicants are gathered and evaluated separately at different times.
- Choose this format when the ad states "Open until filled".

- Choose this format for the flexibility of extending the final date if the position is not filled.

IRD/Open until filled

Key features of IRD/Open until filled:

  ○ The Open date is the date that applicants can begin applying. The Open date locks when the first applicant applies.
  ○ The Initial review date locks when the first applicant applies.
  ○ Final dates don't lock.
  ○ The Analyst can add review dates once the current review date has passed (11:59PM PST), thus extending the search.
  ○ Review dates may be marked "Private". Private review dates are not displayed anywhere to applicants.
  ○ When an applicant completes in time, they'll no longer be able to modify their application. At that point their application is in the hands of the committee and can no longer be changed.
  ○ The final date is not a review date! Applicants who miss the review date(s) will still be able to apply and work on their application until the final date but will only be seen by reviewers if another review date is added.
  ○ Search reports may be created after any review date has passed.
  ○ Recruitment application duration must fall within campus policy. If a duration outside of policy is needed, please contact the campus administrator.

Open/Closed/Final (OCF)

The analyst sets the open, close, and final dates during the Search plan phase. Dates are clearly stated to applicants on the Apply page. Completed applications are visible to committee reviewers as soon as they are complete.

- Choose this format for a one-time search that will complete when the vacant spot(s) are successfully filled.

Open/Close/Final

Key features of Open/Closed/Final:

  ○ The Open date is the date that applicants can begin applying. The Open date locks when the first applicant applies.
  ○ The Close date is when new applicants are no longer accepted. Only a Recruit Admin may change the Close date after there are applicants.
  ○ The Final date is when the recruitment is no longer available to applicants. The Final date doesn't lock.
  ○ Final dates must be equal to or greater than the Close date. Final dates may be used as a grace period to allow existing applicants extra time to modify their applications.

     ○ Recruitment application duration must fall within campus policy. If a duration outside of policy is needed, please contact the campus administrator.

Complete the Search Plan

DETAILS

Navigate to the Details page. The Details page summarizes the recruitment. All designated committee members and approvers can view this page but only analysts can edit the information that is displayed.

Sections within "Details"

- **Recruitment's status.** Dynamically changing status boxes appear at the top of the Details page 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.
- **Public URL.** A unique web address for the recruitment is displayed in a box at the top of the page. Click the link to see how the apply page looks to applicants. Distribute this link for job ads, postings, electronic mailings, and links on other websites.
- **Download advertisement**. Download a PDF of the recruitment ad for convenient distribution to advertising outlets. During the draft state, a DRAFT watermark will appear on the PDF. The watermark will be removed once the recruitment is published.
- **Inline editing.** Click any Edit button on the page. The button opens a corresponding modal editor to make content changes. If the recruitment is in a state where a field can't be changed, a padlock appears next to the field. Roll over the icon to reveal a tool tip.
- **Content areas:**

General information   ☑ Edit

Edit the position name and department.

Search tracking   ☑ Edit

Enter the search tracking information: the salary control number, search breadth, initial search allocation, and approved search area.

Contact Information   Edit

Customize how various parties can inquire about the recruitment.

Dates   ☑ Edit   + Request review date

Edit the open, close, final dates, add review dates.

Committee chairs and editors also have the ability to request the addition of a new review date. The request will be sent to the recruitment owner (in this case, the user who created the recruitment) or the Recruit administrator, depending on campus settings.

Recruitment application duration must fall within campus policy. If a duration outside of policy is needed, please contact the campus administrator.

Internal Analyst Notes [Edit]

Add and edit any special notes to keep with this recruitment. This section never locks.

POSITION

Position details [Edit]

Edit the job location, salary range, anticipated start, position duration, percent time, rank/step.

Title information [🔒 SEARCH PLAN] [Edit]

The Title code field permits an unlimited number of codes to associate with the recruitment. Academic Title Codes map directly to salary scales and also determine the availability data used in applicant pool diversity reporting. The section is locked once the Search plan is approved to ensure that the codes are not retroactively changed to suit a particular candidate.

DESCRIPTION

Position description [🔒 SEARCH PLAN] [+ Add]

Add a description in the text field provided. The description appears to applicants on the apply page and the wording should be the same or similar to that used in all advertisements. Your Diversity and AP office may require specific items to be present in the description, such as:

- The Equal Opportunity/Affirmative Action Employer tagline (EEO) at the bottom of the description.
- "To apply, go to..." and the recruitment's public URL, a unique web address assigned to this recruitment found in the box at the top of the Details page.
- Language about the smoke-free campus

Standard text

Standard text is set by your campus admin and will appear in the ad

AD We are an equal opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability or veteran status.

This section will only display if the campus administrator configured standard text for recruitments; it cannot be edited by analysts. If displayed, this text will be appended to all recruitments. Typically this section is used to include things such as the EEO tagline or information about the UC being a smoke-free campus.

REQUIREMENTS

This is where the analyst configures what the applicants will need to provide in the way of references and documents.

Optional means applicants will be asked for this file but will be complete even if they do not upload it. **Required** means applicants will be asked for this file and will not be complete until they upload it.

The requirements cannot be changed once the first applicant applies!

This section includes:

References

1. Click the **Setup** button to configure the reference requirements.

References ⚙ Setup
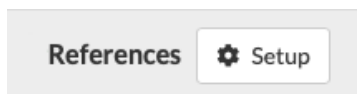
2. **Choose a reference type**
   - Choose **None** when applicants will not be asked for any references.
   - Choose **Contact information only** when applicants will be asked to name references to complete their application. The references will not be asked to provide letters unless the analyst requests them.
   - Choose **Letters of recommendation** when applicants will be asked to name references, and the applicant must request letters to complete their application.
3. **Reference process explanation**
   - Describe to applicants how references will be collected and used.
4. **Choose numbers**
   - Select the number of required and optional references.
5. **Reference visibility**
   - Leave this at the default OR...

- restrict reference viewing to certain members of the search committee. This flexibility is important if departments wish to exclude any graduate students who may be serving on their search committee.
  - **Visible to** is the **only** attribute of the references requirement section that remains editable after the first applicant applies.

6. Expand the **Edit thank you email** template. This is the email message that will be sent to references once the system detects an uploaded letter. Annotate the template if you wish.

> **❯ Edit thank you email**

7. Confirm to close the references modal.
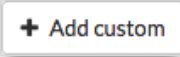
Documents

1. Click the **Start with recommended settings** button to add document requirements in this section. The settings you choose determine which documents applicants will be asked to submit with their application.

> **Documents** Start with recommended settings
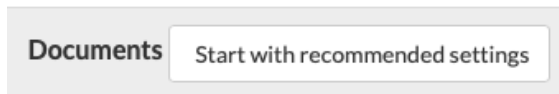
2. Recruit has provided a default, recommended list of documents to request from applicants:
   - Curriculum Vitae (Required)
   - Cover Letter (Optional)
   - Statement of Research (Optional)
   - Teaching Statement (Optional)
   - Inclusive Excellence Activities Statement (Required)
   - Authorization to Release Information Form (Required)
   - Misc. / Additional (Optional)

3. The document requirements are fully configurable:

Action	Description
Add a document	Click the **Add custom** button to add more document requirements one-by-one. **+ Add custom**
Edit	Click the **Edit** link to change the name of any document, modify the description, or change the document from required or optional. Analysts may edit document requirements up until the first applicant applies. **Note:** To ensure the Curriculum Vitae document is properly appended to reports, please name it Curriculum Vitae, CV, Resume, or Resumé only.
Delete	Click the **Delete** link beside any document and confirm its deletion when asked. Document requirements can be deleted by the analyst up until the first applicant applies.
Reorder	Using your mouse, drag the icon to the left of any document to rearrange the order. This will be the order applicants will see when they apply. Analysts can reorder documents up until the first applicant applies.

4. Analysts must complete document requirements carefully, as the documents requirement section will be locked once the first applicant applies. If you need to collect additional information from applicants later, it will only be possible to add optional documents.

QUALIFICATIONS

This section is to document the qualifications required of all applicants and should be reflected in the wording in all advertisements for the recruitment. Qualifications must be non-comparative, objective, relevant and verifiable. Analysts, committee chairs, or editors may add/edit this section up until the Search plan has been approved.
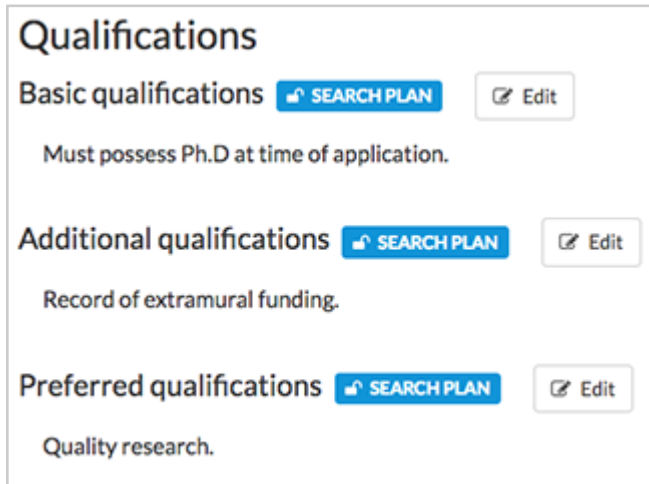
Icons indicate the information is part of the Search plan. Roll over a badge with your mouse to reveal the helper text as shown here:

This information appears in the recruitment's search plan.

SEARCH PLAN   Add

1. For each section, click **Add**.

+ Add
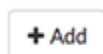
2. Once the BASIC, ADDITIONAL, and PREFERRED fields are filled in, the "Add" buttons will be replaced by "Edit" buttons.

3. **The fields will no longer be editable after the Search plan has been approved.** This restricts the ability to retroactively change the recruitment's goals to suit a particular candidate. Lock icons appear to cue you along with a tooltip when the locks are rolled over.

4. To override the locks in order to fix minor errors, contact a Recruit Administrator.

DIVERSITY

National availability data will display in the Diversity tab of the Recruit application based on the fields of study entered by the analyst, and tenured or non-tenured data is shown based on whether or not the title codes applied to the recruitment are Senate or Non-senate.

The availability data used in Recruit is based on national data provided by UCOP.

Committee chairs, editors, reviewers, and approvers can view the Diversity section, but Analysts will complete the information. Chairs and editors can edit the Equity Advisor Role located in this section.

Icons indicate whether the information is part of the **Search plan** or **Search report**. Roll over a badge with your mouse to reveal the helper text as shown here:

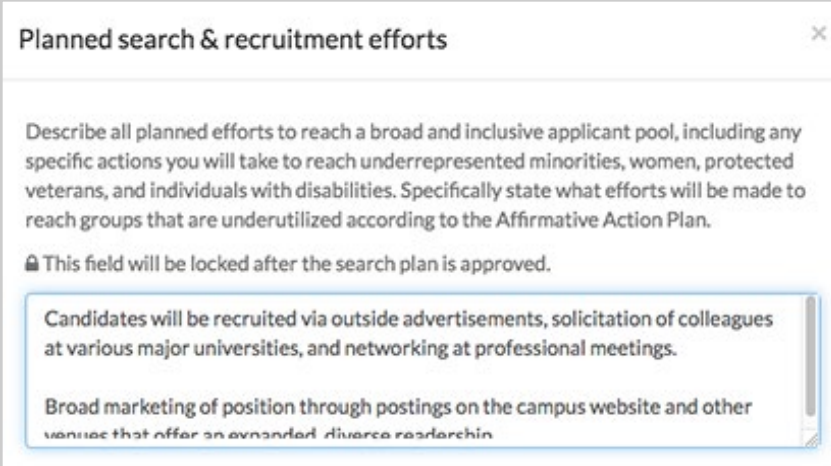This information appears in the recruitment's search plan.

SEARCH PLAN   Add

This section includes:

Availability demographics

- Click the **Edit** button. A modal opens to pick the Field of Study that best matches the recruitment.
- A table displays the chosen field(s) of study along with the corresponding national availability data that is provided via the UC Office of the President (see orange box above). Multiple fields of study may be added.
- 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.

Field of study	Male	Female	African American	Hispanic
Campus: Biometrics and biostatistics	48.3%	51.7%	4.7%	1.8%
Campus: Business administration and management	68.4%	31.6%	6.8%	2.8%
Average ❓	64.7%	35.3%	6.4%	2.6%

Pool demographics

- The Pool demographics table shows the diversity of the pool as the search progresses.
- Watch for any large shifts from one row to the next. When there are too few responses, the percentages are suppressed.
- Please note, respondents who declined to state are not included in the percentages provided in the table.

Affirmative action goals

- Identify the affirmative action goal(s) 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.

Affirmative action goal

Learn more about your unit's AA goals

- None
- American Indian
- Hispanic
- African American
- Asian
- Native Hawaiian/Other Pacific Islander
- Two or More Races/Ethnicities
- Minority
- Women
- Individuals with a Disability
- Protected Veteran

Equity advisor

- The name(s) of the department and/or school Equity Advisor that has been designated by a Recruit administrator will appear here. If not designated, this area will be blank.

Equity advisor role

- Optionally use this field to write a description of the role the above stated Equity Advisor will play in this search.

ADVERTISEMENTS

This section is for all documentation related to advertising. Analysts have full read/write access to all fields in this section. Committee chairs and Editors have read access, with write access to only specific sections

Icons indicate whether the information is part of the **Search plan** or **Search report**. Roll over a badge with your mouse to reveal the helper text as shown here:

This information appears in the recruitment's search plan.

SEARCH PLAN   Add

This section includes:

Planned search & recruitment efforts

Use this field to describe all planned efforts to reach a broad and inclusive applicant pool.

- This field is required to submit the Search plan and it becomes locked after approvals. Locking helps ensure that the efforts will not change based on what happens during a search.
- Analysts, Committee chairs, and Editors have full read/write access to this field before the Search plan is approved. For minor editing only, the lock may be overridden by a Recruit Administrator.

To add the planned search and recruitment efforts:

1. Click the **Add** button to add the missing information.
2. Fill in the free form text field and click to confirm.

> **Planned search & recruitment efforts** ✕
>
> Describe all planned efforts to reach a broad and inclusive applicant pool, including any specific actions you will take to reach underrepresented minorities, women, protected veterans, and individuals with disabilities. Specifically state what efforts will be made to reach groups that are underutilized according to the Affirmative Action Plan.
>
> 🔒 This field will be locked after the search plan is approved.
>
> Candidates will be recruited via outside advertisements, solicitation of colleagues at various major universities, and networking at professional meetings.
>
> Broad marketing of position through postings on the campus website and other venues that offer an expanded, diverse readership

Actual search & recruitment efforts

Return to this field later to enumerate all efforts taken to reach a broad and inclusive applicant pool.

- This field is required to generate the Applicant pool report, Shortlist report, and Search report.

To add the actual search and recruitment efforts:

1. Click the **Add** button to add the missing information.
2. Fill in the free form text field and click to confirm.
3. Analysts, Committee chairs, and Editors have full read/write access to this field before reports are approved. For minor editing after approval, the lock may be

overridden by a Recruit Administrator.

Actual search & recruitment efforts ×

Enumerate all efforts taken to reach a broad and inclusive applicant pool, including any specific actions you took to reach underrepresented minorities, women, protected veterans, and individuals with disabilities. Specifically state what efforts were made to reach groups that are underutilized according to the Affirmative Action Plan. If some of the planned efforts were not undertaken, please state what actions were taken instead, and explain why.

The mailing lists for the Women in Math Psych and Women in Cognitive Sciences were targeted to help increase the number of female applicants for this position. At our annual conference in DC, attending faculty reached out to attendees to

Ad Documents

Upload your ad drafts and final ad copy here.
- Ad documents will appear in the Search plan
- 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.
- Analysts, Committee chairs, and Editors have full read/write access to this field before the Search plan is approved.

To upload an add document:

1. Move to the Ad Documents area on the page.
2. Click **Upload**.

   ☁ Upload

3. Choose the file from your computer.
4. Name the uploaded document
5. Place a comment if needed.
6. Click **Upload File** when done.

Upload ad document ×

* File (must be a .pdf, .txt, or image)

Browse...   Ad-text-short.pdf

Description of uploaded file

Short ad copy

Comment

Our shortened version.

Upload file Cancel

HERC category

Select which category and area of expertise best fits the recruitment from the list of choices.
- This information is for the office or person approving the Search plan to know which category is needed for the best visibility for your job posting in HERC.
- The Analyst provides this information.

To set your HERC category:

a. Move to the HERC category area on the page.
b. Click **Add**.

+ Add
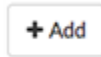
c. Select a category from the drop-down list and click to confirm.

HERC Category   ×

HERC Category

Select HERC Category ▲

| 🔍

Architecture/Preservation/Planning
Arts/Humanities
Aviation
Biological/Biomedical Sciences
Business/Finance
Communications/Journalism
Computer/Information Sciences
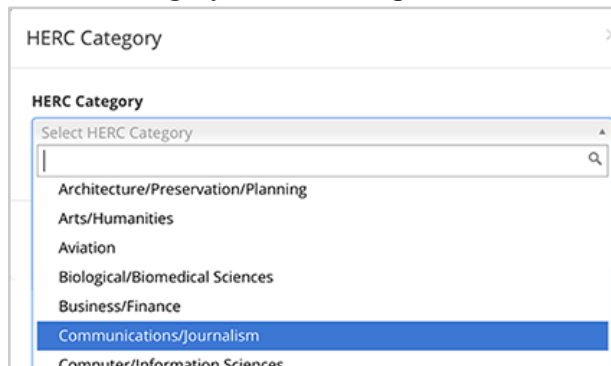
Applicant search sources

Applicants will be asked where they heard about the position.
- While drafting a search plan, analysts must enable the default applicant search sources created by the administrators.
- Analysts may also add or create new applicant search sources.

To enable the Applicant search sources:

1. Move to the Applicant search sources section.
2. Click on **Start with default sources**
3. A default list will display

Search source options ❔ SEARCH PLAN   + Add

Defaults
- 🔒 E-mail Listserv
- 🔒 LinkedIn
- 🔒 Professional Journal / Bulletin (printed publication)
- 🔒 Professional Organization (Web site job posting)
- 🔒 Professional Organization Conference
- 🔒 UCI Newsletter
- 🔒 UCI website
- 🔒 Word-of-mouth / Colleague

Recruitment level
- American College of Obstetrics and Gynecology (ACOG) 🗑 Delete
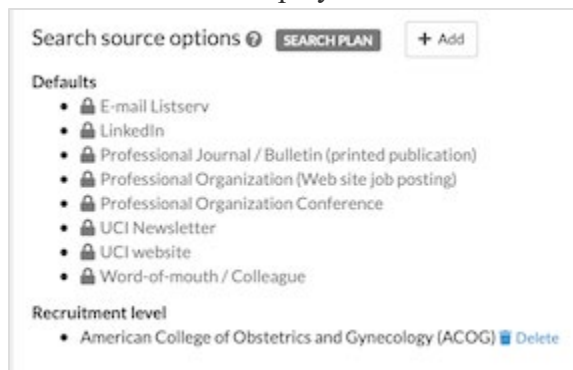
4. Click on **Add** to create additional Applicant search sources at the recruitment level.

Applicant search sources responses

This list corresponds to the choices on the application wizard. As applicants submit their applications, the number of responses displayed here will change dynamically, assisting you in your outreach efforts.

Ad sources

List the various places where your recruitment will be advertised.
- Ad sources will appear in the Search plan.
- Analysts, Committee chairs, and Editors have full read/write access to this field before the Search plan is approved.
- This list is pre-populated by the Applicant search sources. An analyst can add/delete any ad source as needed.

To add to the ad sources:

    a. Move to the Ad sources area on the Advertisements page.
    b. Click **Add**.
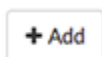
    c. Name the ad source in the space provided and click to confirm.

Evidences of advertisement

Return to this area when you can provide proof that an advertisement was placed.
- Evidences will append to the Search report.
- For OFCCP (Federal audits), copies of actual ads will be needed.
- Uploaded evidence may be .pdf, .txt, or an image file.
- The Analyst provides this information.

To upload your evidences:

    1. Move to the Evidences of advertisement area on the page.
    2. Click **Upload**.

    3. Choose the ad source from the drop-down list.
    4. Choose the file from your computer.

5. Name the uploaded document
6. Place a comment if needed.
7. Click **Upload File** when to confirm.

SELECTION PROCESS

This section is for analysts, chairs, or editors to document the job related criteria and the committee's plan for the selection of candidates. Approvers and reviewers may see these fields but may not edit them.

Icons indicate the information is part of the **Search Plan**. Roll over a badge with your mouse to reveal the helper text as shown here:

1. Click **Add** beside the fields. Once the information is added, the "Add" buttons will be replaced by "Edit" buttons.

   + Add
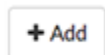
This section includes:

Selection Criteria

Outline the evaluation and selection criteria the committee will use to evaluate the applicants. These should be job-related and consistently applied to all applicants.

Selection Plan

Describe the steps the committee will use to evaluate the applicants in order to arrive at the finalist(s) e.g. in-person/phone/or Skype interviews, voting procedures (if applicable), etc. If reference letters are to be solicited via Contact Info Only, describe at what stage it will occur and for which applicants (shortlisted only, etc.).

Specializations

You may create a custom list for applicants to match their area of expertise when they fill out their application. Then the search committee will be able to sort applicants based on these self-selected specializations.

There are two types of specializations lists:

1. List (optional for applicants): Applicants will optionally be able to pick as many specializations from the list as they desire. Or they can choose to pick none.

   List (optional for applicants)

2. Ranked list (required for applicants): Applicants must pick a primary specialization and may also pick a secondary and tertiary specialization from the list.

   Ranked list (required for applicants)

- In order to create lists faster, Recruit supports copying/pasting whole lists from many other programs. Just put each specialization on its own line before you copy/paste.
- Specializations will be locked once the first applicant applies.

COMMITTEE

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

Icons indicate the information is part of the **Search plan**. Roll over a badge with your mouse to reveal the helper text as shown here:


The Committee Member Roles

The designation between "Core" members and "Additional access" helps to satisfy annual reporting requirements for the Office of the President regarding applicant pools and search committee demographics. "Core" members are actual members of the search committee to be named in the Search plan. "Additional" people may be overseers, added later if the department deems this necessary.

- **Core Chairs** have complete management rights to the applicants' files, although many of these tasks may be delegated to the department analyst or staff editor.
  - Add'l Chairs may be added later (e.g. after plan approval) and will have the same access rights as their counterpart.
- **Faculty Editors** have the same access rights as Chairs and are able to assist managing the applications.
  - Add'l Editors are usually staff personnel designated to assist the analyst. They will have the same access rights as their counterparts.
- **Core Reviewers** have read-only rights to only completed applications. However, Admins can use the Edit button to grant Reviewers disposition permissions, allowing reviewers to disposition complete applications.
  - Add'l Reviewers may be added later and will have the same access rights as their counterpart.

To add members one at a time:

1. Beside a role, click the link **Add one now**.
2. Enter the person's name, email address, or campus ID into the search box.
3. Highlight the name and click the **Add** button to confirm.
4. Verify the name has been added to the appropriate role.

To add committee members in bulk:
Add faculty from entire departments at once using an extended search.

1. Click the **Add members** button.
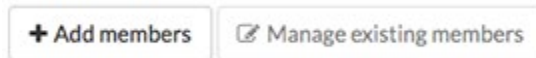
2. Search by school and by department.
3. A list of the department's faculty names appear.
4. Beside the department name, use the drop-down selector to assign a role to all department faculty at once.
5. Beside an individual faculty's name, you may assign a different role using the drop-down selector.

6. Click **Save & Done** to confirm.
7. To change the role or remove altogether, click "Manage existing members."
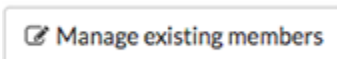
DOCUMENTATION

This section is for analysts, chairs, or editors to archive and retrieve various materials associated with the recruitment. Any approver named in the recruitment can view this section but can't edit it. Reviewers do not have access to this section.

Accepted file types: Files must be .pdf, .txt, or images.

Icons indicate whether the information is part of the **Search plan** or **Search report**. Roll over a badge with your mouse to reveal the helper text as shown here:

This section includes:

Search plan documents

Upload any additional required materials as part of the search plan (for example, an organizational chart to assist in verification of the position classification). As the badge indicates, these documents will be included in the search plan.

1. Move to the Search plan Documents area on the page.
2. Click **Upload**.
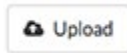
☁ Upload

3. Choose the file from your computer (.pdf, .txt, or an image).
4. Describe the uploaded file.
5. Add a comment if needed.

Upload search plan document   ×

* File (must be a .pdf, .txt, or image)
Choose File thumbnail.pdf

Description of uploaded file

Organizational chart

Comment

To verify position classification.

Letters and Memos

Letters and memos typically include the search committee report, and the letter from the department chair to the dean that discusses the proposed candidate.

1. Move to the Letters and Memos area on the page.
2. Click Upload.

☁ Upload

3. Choose the file from your computer (.pdf, .txt, or an image).
4. Give the item a name.
5. Add a comment if needed.
6. Optionally associate the item with an applicant's name using the drop-down selector.

Interview Materials

All documentation resulting from interviews must be retained and uploaded into Recruit. For example: standardized questions used for interviews, evaluation tools used, and notes taken during applicant interviews and verbal reference checks, etc.

1. Move to the Interview Materials area on the page.
2. Click **Upload**.

3. Choose the file from your computer (.pdf, .txt, or an image).
4. Give the item a name.
5. Add a comment if needed.
6. Optionally associate the item with an applicant's name using the drop-down selector

DISPOSITION REASONS

Disposition reasons justify why applicants didn't move forward in the hiring process and will be an important component of the final **Search report**.

This section displays default disposition reasons that will be used later to assign to applicants. Analysts may customize the list of reasons. The icon indicates the customization is part of the **Search plan** to be submitted for approval. Roll over a badge with your mouse to reveal the helper text as shown here:

This section includes:

Customize disposition reasons

If needed, Analysts may customize the list up until the Search Plan has been approved.

1. Click "Add custom disposition reasons."

2. Add up to 5 custom reasons.

3. Save Changes

4. The custom reason appears at the top of the list

5. To edit, click "Manage custom reasons."

Suppress disposition reasons

If needed, Analysts may suppress any of the reasons up until the Search Plan has been approved.

1. Click "Manage suppressed reasons."

2. Uncheck a reason to suppress.
3. Save Changes
4. To edit, click "Manage suppressed reasons."

Disposition status panel

As time marches forward in the lifecycle of the search, use this helper panel to show the number of applicants needing disposition reasons. Click on one of the links to be taken directly to the disposition reasons assignment screen for those applicants who are missing reasons. If there are any completed applicants who have yet to be marked as Meets or Doesn't Meet Basic Qualifications, there is a link for that as well.

Copy Recruitments

Any user who can create a recruitment has the option to copy an existing, previously approved recruitment from within the current or previous two academic years. Copying a recruitment will create a new JPF number, and will copy over select elements into the newly created recruitment ad. The newly created recruitment ad will still need to be completed and submitted for approval before it can be published.

When copying a recruitment, all fields eligible to be copied will be selected by default, though the user may choose to deselect elements if they wish.

COPYING FROM THE RECRUITMENTS GRID

1. Click the "Create new recruitment via copy" button.

2. Enter the name or JPF number of the recruitment you wish to copy into the source recruitment field and select it.

3. If you wish to use a recruitment name different from the one used in the source recruitment, enter a new recruitment name into the "Name of new recruitment" field.

4. Choose which fields you wish to copy over into the new recruitment. By default, all eligible fields will be copied. For additional detail on the eligible fields, click the "Show more" link to expand the view.
5. Click the "Copy recruitment plan" button.

COPYING FROM WITHIN AN ELIGIBLE SOURCE RECRUITMENT

1. Open the recruitment you wish to copy.
2. Scroll down to the Tools section and click "Copy this recruitment"

3. If you wish to use a recruitment name different than the one used in the source recruitment, enter a new recruitment name into the "Name of new recruitment" field.

4. Choose which fields you wish to copy over into the new recruitment. By default, all eligible fields will be copied. For additional detail on the eligible fields, click the "Show more" link to expand the view.
5. Click the "Copy recruitment plan" button.

COPYING MULTI-LEVEL RECRUITMENTS

When copying a multi-level recruitment, all elements must be copied to the new recruitment. Copied elements can be edited in the newly created recruitment before submitting the search plan for approval.

Create new recruitment via copy   ×

The items below will be copied and should be reviewed and edited as needed after copying. All other fields will be created blank and will need to be filled in. Multi-level recruitments must copy all the items below; no selections can be made.

Source Recruitment ❓
Multilevel recruitment - Senate only (JPF02077)

*** Name of new recruitment** ❓

Multilevel recruitment - Senate positions

This is the name of the recruitment ad and what applicants will see when they apply

Fields that will be copied ❓

☑ Search tracking ❯ Show more
☑ Contact information ❯ Show more
☑ Position ❯ Show more
☑ Description ❯ Show more
☑ Requirements ❯ Show more
☑ Qualifications ❯ Show more
☑ Advertisements ❯ Show more
☑ Selection process ❯ Show more
☑ Disposition reasons ❯ Show more

Copy recruitment plan   Cancel

Multi-level Recruitments

MULTI-LEVEL RECRUITMENTS DEFINED

A multi-level recruitment is a type of recruitment that requires applicants to select a level during the application process. This is typically used for open rank recruitments.

WHAT IS A LEVEL?

A level includes a set of title codes, reference requirements, and document requirements that are configured by the department running the recruitment. Each level is assigned availability cohorts based on the title codes assigned to the level.

WHEN IS A MULTI-LEVEL RECRUITMENT APPROPRIATE TO USE?

Multi-level recruitments will allow an analyst to assign different document and reference requirements for applicants within the same recruitment. It is typically used for open rank recruitments, but the analyst should consult with their central offices for further information.

How do the reports change with multi-level recruitments?

Search plans, Applicant pool reports, Shortlist reports, and Search reports are subdivided by level, with level-specific information displayed accordingly.

How to create a multi-level recruitment

Creating a multi-level recruitment is similar to creating a normal recruitment, only with a few extra steps.

1. Create a recruitment online.

   Create New Recruitment Plan

2. Click the Edit button in the Title Information section.

   Title information ✐ Edit

3. Click the button, **Make this recruitment multi-level**

   ⑂ Make this recruitment multi-level

4. Enter:
   - Level name
   - Applicant instructions (define purpose of instructions)
   - Title codes for this level
   - Add another level
   - Reorder the levels (if desired)
5. Click **Save changes**.

Multi- level Recruitment changes

Multi-level recruitments can be undone before the **Search plan** has been approved. Once the **Search plan** is completely approved, the recruitment can't be switched back to a single-level recruitment.

1. On the Positions page, click the **Edit** button in the Title Information section.

   Title and level information 🔒 SEARCH PLAN   ✐ Edit

2. Click the "Remove level" link.

   ⊗ Remove Level

Can an applicant switch their level?

Yes, as long as their application is still editable, they'll see a link that permits them to switch their level. Recruit displays an alert message before they confirm the change.

1.   Applicant logs into their application.
2.   At the top of every page of their application, the level is displayed. When clicked, a confirmation box appears.
3.   Un-needed documents for the new level will be removed.
4.   All references (contacts or letters) will be removed regardless of whether they'll be needed in the new level.

Can the department switch an applicant's level?

Yes. Search committees may encounter an application that's better suited for a different level. Administrator access may be required for this activity. If the applicant can still edit their application, they can change levels on their own. You should strongly consider discussing this change with them, and may wish to instruct them to make the change themselves. Otherwise, they may change it back and undo your work.

Important! Level changes can delete applicant materials. To help ensure fair hiring practices, documents that are not required by the new level will be hidden. All references and letters will be deleted.

Switching an applicant's level results in:

● The applicant's status will not change.
● Applications keep their completion date and review window, even if required materials for the new level are missing.
● Un-needed documents for the new level will be removed.
● All references (contacts or letters) will be removed regardless of whether they'll be needed in the new level.

1.   Go to the applicant's review page.
2.   Click the link in the Selected level box. Admins may make the switch and analysts may only make the switch if it is permitted by the campus.

Selected level	Assistant Professor ❷
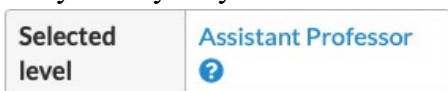
3.   Read the text instructions and choose the level desired. Save the changes.

Note: When the recruitment is still open, coordinate the switch with the applicant and instruct them to make the switch themselves.

Approvals and Publishing

SUBMIT PLAN FOR APPROVAL

Analysts submit the search plan for approval after providing all necessary information based on the department's search business practices. Recruitment plans (draft recruitments) must be approved before the recruitment becomes visible to applicants or the search committee.

1. Access Recruit
2. Click the Recruitments tab in the top menu bar.
3. Find the recruitment and click the Search info link or its JPF#.
4. At the top of the Details screen, click the link "submit it for approval".

   > **DRAFT** ✅ Checklist complete (4/4). When the search plan is ready, submit it for approval.

5. There may be a system-assigned workflow containing a list of approver's roles in a progression. If you think this workflow is incorrect, stop here and report this using the contact link. Otherwise, click **Yes, submit for approval**.

   > **Are you sure you want to submit this plan for approval?** ✕
   >
   > Search plan checklist complete. Your department may require that additional fields be filled out before the search plan can be approved.
   >
   > ❯ Show search plan checklist
   >
   > A new approval will be created for this plan.
   > The approval will use the workflow "**Everything!**", which includes the following steps:
   >
   > > 1. Faculty Principal Investigator
   > > 2. Committee Chair
   > >
   > > You will be able to add steps after creation.
   >
   > If this is not the correct workflow, please contact Support.
   >
   > [Yes, submit for approval] Cancel

6. The Approval Request screen opens.
7. Click **Download plan** to see a PDF of the search plan. This proposed plan will be what your approver(s) will review.

   > [⬇ Download plan]

8. Click the button, **Add a comment** to communicate with approvers through Recruit.

   > [💬 Add a comment]

9. **Specify Person.** Each step must have at least one person assigned. In some cases, the system automatically takes care of this. For example, the Diversity Office may already be pre-populated

with a person's name. For all steps that are not labeled with a person's name, click the link, "Specify person".

   👤 Specify person

10. Enter the person's email address, campus ID, or name into the box.
11. Click **Add**.
12. **Remove specified person.** (ex: "I typed the wrong user name here; let me fix that.") To remove a name you have specified, click the "Remove" link. Analysts cannot remove names that were automatically assigned by the system and should contact a Recruit administrator if they believe a name appears in error.
13. **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. Click the "Add alternate approver" link.

   👤 Add alternate approver
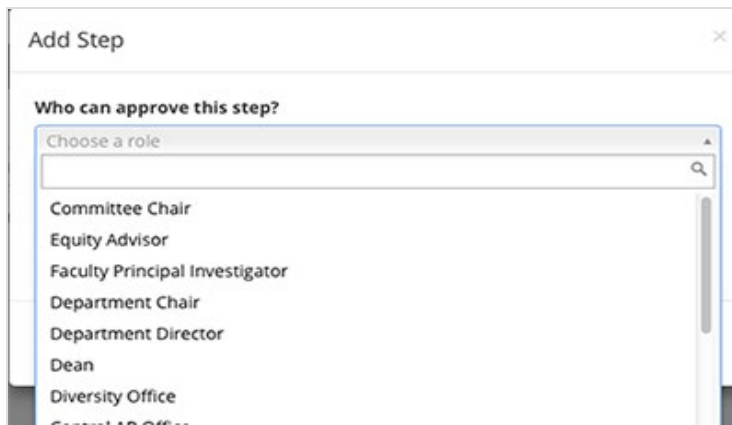
14. Enter the person's email address, campus ID, or name into the box.
15. Click **Add**.
16. **Add steps/Augment steps with additional steps.** (ex: "We also need the PI's vote.") Click the "Add step" link.

   ➕ Add step

17. Choose a role from the list.

    ○ **Optional Approvers.** Optional approvers are merely overseers or proofreaders, designed to be another pair of eyes. If they neglect to approve the plan, it is inconsequential to the flow of the plan. Optional approvers will never see the approval request in their "To Do" bin and the analyst must send them the direct link to the approval screen. To assign an optional approver, uncheck the default **Required** box.

18. Click **Save changes**.
19. Don't forget to specify a person for the new step. Click the "Specify person" link.
20. **Reorder Steps.** (ex: "let's not bother the Dean until the PI says yes.") Click the "Reorder steps" link.

   🔀 Reorder steps

21. Enter the person's email address, campus ID, or name into the box.
22. Click **Add**.

23. > **Comments:** Check back often to expand the chevron (>) and this will display any comments left by others.

Automatic Approver Emails: At each step, Recruit sends email to approvers that their approval is needed, and the submitter receives a copy.
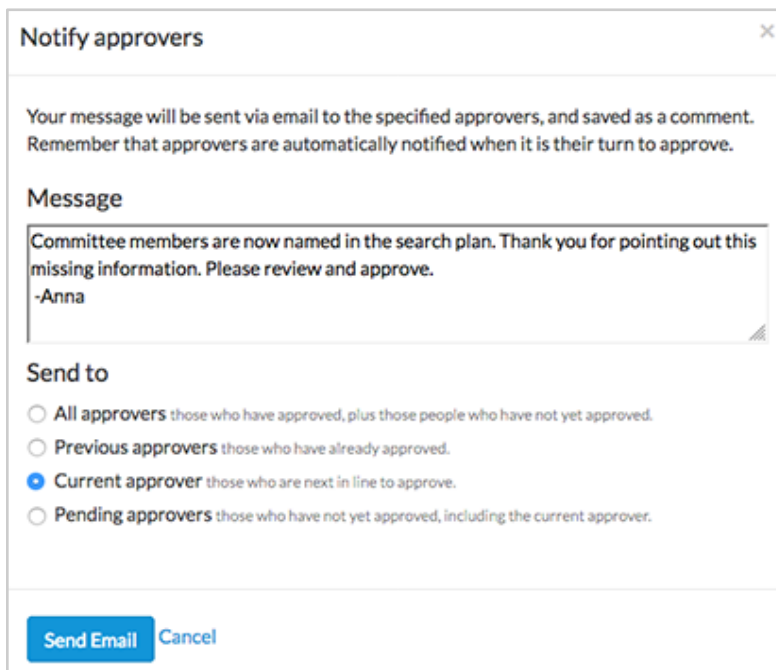
- The email includes a direct link to the approval screen where approvers may download the plan, comment, and approve.
- When Recruit detects an approval, the next in line is notified.
- After the last step approves, Recruit sends a notification to the submitter with next steps to take.
- Approvers may choose to opt out of email notifications.

Additional Email Notifications: Optionally use the "Notify approvers" button for further communications along the workflow. For example: 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.

1. Click the "Notify approvers" button.

   ✉ Notify Approvers

2. Type the message and choose whom to send it to.
3. Click "Send Email".

   Notify approvers   ✕

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

   Message

   Committee members are now named in the search plan. Thank you for pointing out this
   missing information. Please review and approve.
   -Anna

   Send to

   ○ **All approvers** those who have approved, plus those people who have not yet approved.
   ○ **Previous approvers** those who have already approved.
   ● **Current approver** those who are next in line to approve.
   ○ **Pending approvers** those who have not yet approved, including the current approver.

   Send Email Cancel

APPROVER'S TASKS

The following are the steps 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 Irvine Recruit] Approval Request [name of recruitment]**
   - Follow the link provided in the message where you will be prompted to login to Recruit.
   - Once logged in, the approval request screen appears, where the user will review, approve, or comment on the recruitment plan.

2. **Or bypass the email and log into Recruit directly**
   - Access Recruit
   - If you are next in line to approve, Recruit's News & Updates page displays the approval link(s):

   - Users can also click on the Approvals tab at the top of the page, which will display all approval requests

3. The link opens a personalized "To Do" approval dashboard. The list may be filtered, and columns may be added.

4. Find the recruitment name and click on it. The approval request screen opens.

The Approval request screen

The approval process screen has been updated to make it easier to note who is the next approver in the approval process. Approvers may see one or all of the following sections on the approval process screen:

Name	Description
Previous approvers	This is hidden by default but can be expanded to display a list of approvers who have made a decision in a prior step.
Current approver	This will display the next approver in the approval step

| Upcoming approvers | Any approvers who are part of a future approval step will be listed here. |

The Notify approvers and Download plan button are now below the Current approver section.

Download plan button: This opens a PDF of the report for your review. After reviewing the document, return to the approvals screen in Recruit.

In the Current approver section, the **Make decision now button** opens up a modal that provides the approver with the option to approve the request or request a change.

Approve

An approver can select **Approve** and click on the approve button to confirm the decision. Please note that a comment can be added before saving the approval and it will display in the Comment section. Once this decision has been made, it cannot be undone. The department analyst will be notified by email.

Approving the report places the approver's name in a grid on the page with a "thumbs up" icon to cue the analyst and any other approvers that this report has passed the review.

Approver comments

Approvers may also leave comments directly through the Comments section.

○ The comment is recorded and provided at the bottom of the approval request screen where all approvers can read one another's comments.
○ Comments trigger a heads-up email to the Analyst who submitted the report.

1. Enter your comment by clicking the button:

2. Enter text in the field provided.
3. To confirm, click the button, **Add comment**. Comments may not be removed or edited.

Request a change

An approver can notify the analyst that a change is required before making a decision on a submitted request.

1. Click on the blue **Make Decision Now** button
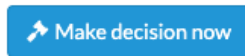
2. Select **Request changes** and specify the required changes in the comment field

3. Once done, click the **Request changes** button
4. The approval step will be highlighted in orange and include a highlighter icon next to it. It will also show the comment thread within the approval step.

5. The analyst will be notified via email about the request and it will be removed from the approver's to-do list.

Anyone viewing the approval will be able to see that a change request is currently open and follow along by clicking on **Details**.

Resolve a change request

The user who opened the change request can resolve the request. Additional approvers associated with the approval step can also resolve the change request as part of the approval process.

1. Click on **Details** to open the change request
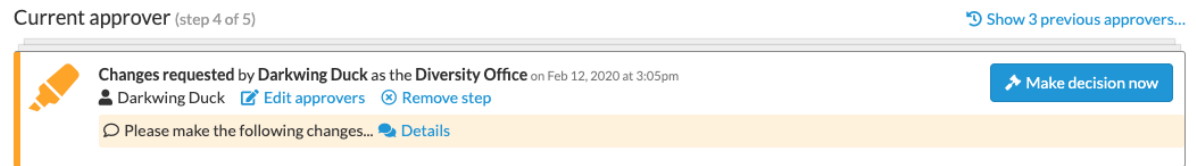
2. Click on **resolve**
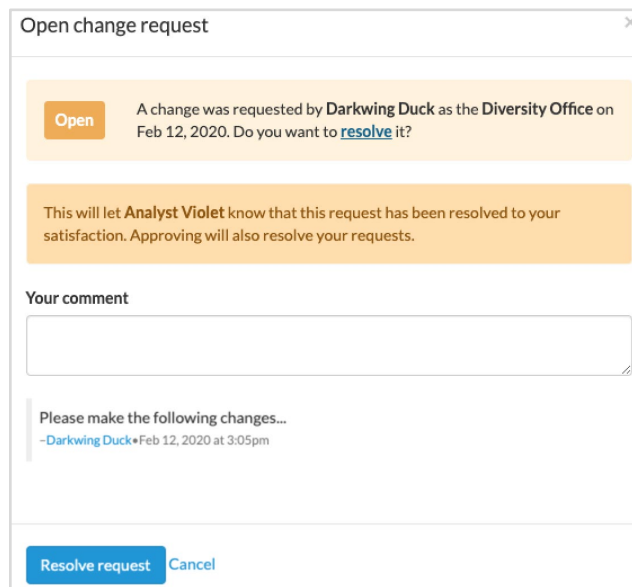
3. A message will display indicating that the analyst will be notified
4. A comment can be entered, but it is optional
5. When ready, click on the **Resolve request** button
6. The comment thread within the approval step will show that it has been resolved
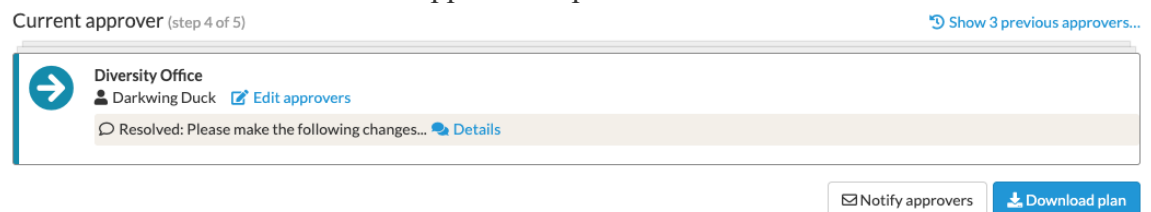
7. An email will be sent to the analyst and additional approvers associated with the approval step

Reopen a change request

A change request can be reopened if the approver does not feel their concerns were addressed.

1. On the approval step with a resolved change request, click on **Details**

2. Click on **reopen** and enter a comment

3. When ready, click on **Reopen request** button
4. The comment thread within the approval step will show that there is an open change request again and it will be highlighted in orange

5. An email will be sent to the analyst to notify them of the request

Request a change to be reviewed by a previous step

An approver can request a change to be reviewed by another person in a previous step, if they determine that the approval should not have come to them in its current state.

1. Go to the approval grid

2. Click on the blue **Make Decision Now** button

3. In the popup modal, select **Request changes**

4. Click on "When resolved, require a review from the…"
   Note: By default, the pull down menu will allow the requestor to select a previous approver and notify them of their request

5. A comment will be required before clicking on **Request changes** button
6. When a change is requested this way, a new step is created for the selected approver with an open change request.

PUBLISH AN APPROVED PLAN

Publishing controls whether the recruitment is in a draft state, or ready to be shown to applicants. When a recruitment is not published, it will not be shown to applicants under any circumstances. If it is, then the recruitment will be shown to applicants within the specified open/closed dates.

1. Access Recruit
2. Click the Recruitments tab in the top menu bar.
3. Find the recruitment and click the Search info link or its JPF#.
4. At the top of the Details screen, click "Publish now".

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

Unpublishing: This flexibility built into Recruit allows an authorized user (typically the department 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 off-line. An **Unpublish** link appears at the top of the Details screen and is available up until the first applicant applies.

Published on Jun 1, 2018 by Peter School Analyst•Unpublish

Editing Recruitments

WHEN AND HOW TO EDIT

The flexibility of Recruit allows analysts and admins to edit many parts of the Search Plan, even after approvals.

- Your own department's business practices should dictate when it is prudent and necessary to edit information that has already been approved, just as you would in a paper process.
- Be advised, once a person in a role has approved the recruitment's Search Plan, there is no re-approving it by that same person in that role. For that reason, it's advised to use the comments section to document any edits that occur after a plan has been approved.

EDITING A PUBLISHED RECRUITMENT

Once a recruitment is published, the final PDF of the approved Search Plan is available for download. This is a snapshot in time; a historical record of what was approved.

- If changes are made to the recruitment of any kind after it is published, the change will not be reflected in the PDF.

EDITING REQUIREMENTS AFTER APPLICANTS APPLY

Until the first applicant applies, analysts may edit reference and document requirements.

- After the first applicant has applied, changing requirements is restricted in order to ensure an equitable process.
- It will **only** be possible to add late, **optional** documents. This is done on the Requirements page.

Adding late, optional documents

After the first applicant has applied, changing requirements is restricted. It will **only** be possible to add late, **optional** documents in order to ensure an equitable process. The new document will lock as soon as it is added, and no further changes may be made.

1. Return to the **Requirements** page.
2. Notice the locked indicator. Notice that all documents in the list are non-editable.

   🔒 FIRST APPLICANT

3. Click the button, **Add optional document**.

   Documents   + Add optional document

4. Name the document.
5. Use the text field if you want to briefly describe it for the applicants.
6. An email will be sent to all applicants encouraging them to log in and upload their file. Use the text field if you want to annotate the automated message.
7. View an example of the automated notification email:

   Subject: UC Irvine AP Recruit: Optional Document Requested

   Hello <Applicant Name>,

   You are being sent this email because you applied to the following position at the University of California, Irvine:
   　　　　Recruitment: Professor of Lorem Ipsum
   　　　　Department: Department D
   Please note that the hiring department has requested that you provide a new, optional document:
   　　<Optional document title>

   You have until <date> to provide this document. Log into your application here:
   　　<Link to log in to applicant dashboard>

   More information from the hiring department:
   <Custom text provided by department>

   If you have any questions, please contact the hiring department directly:
   　　<Link to contact form for applicants>

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

8. Click the button, **Add new locked document**.

   Add new locked document

9. Verify the new, optional document appears in the list of document requirements.

RECRUITMENT CROSS-LISTING

Sometimes academic positions are shared between units (Departments or Schools) 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 crosslisted units will not have analyst access.
- The recruitment is displayed beneath the name of the home department and the crosslisted unit(s) on Recruit's apply page.
- The applicant's dashboard displays the name of the home department and the crosslisted 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 department 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. Use the Edit button next to General information.

General information   ☑ Edit

4. Click the link, "Add crosslisted unit".

➕ Add crosslisted unit

5. Place the cursor in the "Crosslisted Units" field and select from the drop-down list of unit names. You may add as many as needed.
6. Click **Save Changes** to confirm.

Note: If the list doesn't show the unit you wish to cross-list, contact Recruit Support for assistance.

DELETING RECRUITMENTS

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.

When deleting recruitments, please keep in mind the following:

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

When a Search is Finished

CONCLUDING A SEARCH

Analysts will return to this section when the search is ready to be concluded to specify how the recruitment ended so that its history and year-end reports can reflect the outcome.

1. Access Recruit
2. Click the Recruitments tab in the top menu bar.
3. Find the recruitment in the list and click the "JP" number or the "Search info" link.

JP #	Name	Depart
JPF00258	Laudantium Rerum Ut Recruitment Search Info Applicants (86) Reports	Departr

4. From the Search info menu, click "Conclusion."

SEARCH OUTCOME

At the top of the Conclusion page is the "Search outcome section." This is where to tell Recruit how things went with the search.

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

Search Outcome SEARCH REPORT   ☑ Select the outcome of this search

2. Make a selection from the outcome choices. Add a note. Then click **Save changes**.

Search Outcome   ✕

What was the outcome of this search?
● **Candidates hired:** One or more applicants were appointed

Our pool search was successful.

○ **No candidates hired:** The search proposed one or more candidates but none were hired
○ **No candidates proposed:** The search did not result in any proposed candidates
○ **Canceled:** The entire search is canceled (e.g., due to lack of funding)
○ **Other:** The search ended for some other reason

Save changes Cancel

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.

1. Roll over the orange dot for instructions. Update all the candidates displayed in the panel to *Hired*, *Declined offer*, *Campus declined to make offer*, or *Withdrawn after proposed candidate*.


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

Recruitment closing

Use this section for recruitments advertised as "Open until filled". Analysts can request early closure from an administrator, which 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 **Recruitment closing** section, click the link "Request pool closure."
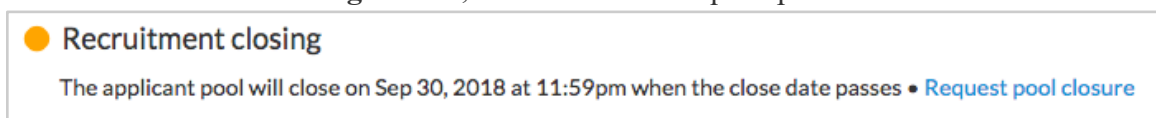
2. Explain why the pool should be closed early and an administrator will review your request and assist you.

Recruitment conclusion

The last section on the page is where analysts or admins will conclude the search.

1. When the conclude button is not clickable, a checklist indicates that information is missing. For example, it may cue you to update a candidate to "hired" or provide the explanation explaining a canceled search outcome. Follow the corresponding link(s) to reach the missing data fields.

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

3. **Note:** Administrative review may be required to conclude searches with outcomes marked **"Canceled"** or **"Other."**

4. The date and person who concluded the recruitment is logged. If concluded by mistake, it may be reopened.

5. Once concluded, the recruitment is no longer visible to any search committee member, approver, or applicant. Returning applicants may log into their applications, but may not make any changes.

INACTIVE RECRUITMENTS

Before search conclusion was developed in Recruit, analysts marked finished searches, "Inactive." While this action effectively took the recruitment out of the view of the committee and applicants, it didn't give Recruit any information regarding the outcome of the search.
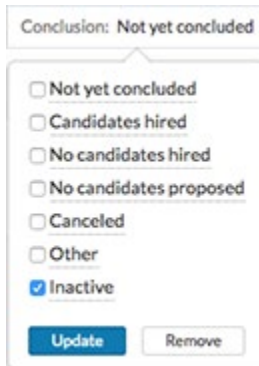
Concluding the search is the new "Inactive"

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.

From the Recruitments page...

1. List the inactive recruitment(s) using the **Conclusion** filter.
2. Update the conclusion filter by clearing all checkmarks except "Inactive".

3. Follow the steps for concluding a search .

Part 2: Applicant Pools and Individual Applicants
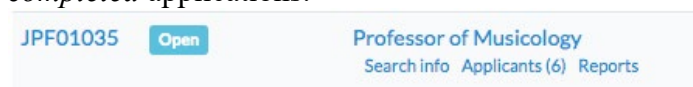
The Search Plan has been approved, published and applicants have begun applying. Locate the applicant pool from the **Recruitments** page.
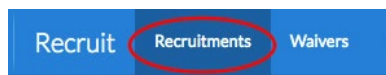
1. Click the *Applicants* link beneath the name of the recruitment. ***Note:*** The applicant count in parenthesis is the total number of people who have *applied*. For reviewers, the number represents *completed* applications:

Another way to reach the applicants is the Applicant tab found at the top of a recruitment's details page:

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 to sort.
- **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 filters & columns** button to customize your filters and columns.

- **Manage workspace:** 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.
- Refer to the section, Workspaces: Recruit's Filters, Columns, and Sorting.

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: Quickly check off which application you have reviewed. The feature is available to all users with applicant viewing rights. 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. To select all applicants at once, check the master box at the top of the column.

2. Click the **Read** button in the row at the top of the list of names and select "Read."
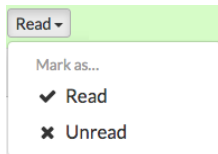
3. When Read is selected, a green indicator will appear in the applicant's row.

4. If modified since you marked it as read, an alert icon will appear in place of the green checkmark. Check the applicant's log for the exact changes.


Hide / Unhide an applicant: Recruit never deletes an application but "Hide" comes close. This feature is only available to Analysts, Committee Chairs, and Editors.

Note: Use this tool sparingly! When you hide an application, it's hidden from everyone else too. In fact, the only good reason to use this tool may be if an applicant has applied to the same position twice.

1. Locate the applicant or applicants in the list and put a check in the empty box in their row.
2. Click the **Visibility** button in the row at the top of the list of names and select "Hidden."
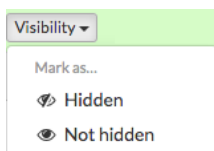
Add a Personal Note: This is a way to jot yourself a note about an applicant. The feature is available to all users who can view the applicants. Personal Notes are private - only YOU can view, edit or remove your note.

1. Click the link, "Add" in the Personal Note column beside the applicant's name.
2. Compose your note (up to 255 characters) in the pop-up box that appears.
3. A truncated note appears in the Personal Note column. To read it in full, roll over it with your mouse.
4. Click "Edit" to adjust your note. Adjust or erase the text and click "Save changes."

Personal Note		Personal Note
	☐	
Add	☐	My number one choice bec...

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.

Paucek, Patricia
● ● ●
≣ Log ☁ Download

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.

Paucek, Patricia
● ● ●
≣ Log ☁ Download

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.

Paucek, Patricia
● ● ●
≣ Log ☁ Download

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.

Applicant	Not shown to reviewers: applicant is hidden
Steele, Rusty	🚫
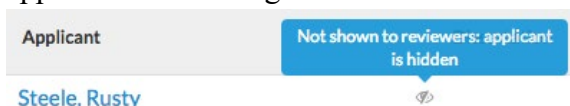
SEND BULK EMAIL

Use a template to compose a single message to send to one or more applicants. *Only Analysts, Chairs*

and Editors have this tool.

1. Locate the applicant or applicants in the list and put a check in the empty box in their row. To select all applicants at once, check the master box at the top of the column.

2. Then click "Send Bulk Email" in the row at the top of the list of names.
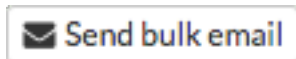
   ✉ Send bulk email

3. A template opens:

Email Applicants

To:
2 applicants

* Replies should be sent to:

"Joan Dept Analyst" <joananalyst@uci.edu>

* Subject:

Thank you {ApplicantName}

Variables: Click on a variable to insert into the subject
Applicant first name   Applicant last name   Applicant full name   Applicant completed date   Recruitment name   Username

* Body:

Hello,

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.

* *Notification of data usage*

○ Notify applicant but do not activate access
Email applicant letting them know that the application was created, but wait until later to let them log in

○ Notify applicant and activate access
Email instructions informing the applicant how to log in, manage their application, and take the demographic survey

○ I will notify the applicant about our data usage policy at a later time ❓
Choose this if you will provide notice manually or will eventually activate the application

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

1. 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.

2. Locate the added applicant in the list and click directly on the name. Verify the information in the "Account access" section.

Account access

Notification email sent	No
Activation email sent	Yes, sent on Nov 11, 2016 at 10:10pm
Application activated	Not activated Resend activation email
Application received	Apr 17, 2013
Added on	Apr 17, 2013 at 1:17pm
Added by	Seth Roby (sroby@uci.edu)

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.

- Marking the applicants is needed in order to produce accurate diversity reporting to meet the requirements of the U.S. Department of Labor/ Office of Federal Contractor Compliance Programs (OFCCP).
- Marking the qualified applicants helps the committee zero in on the applications to review.
- Only analysts, committee chairs, and editors have the ability to mark the applicants.

Determine whether **completed** applicants 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). Revisit the Qualifications section to see what qualifications were established for the recruitment before making the judgement. Contact the campus Diversity Office for help if you are unsure about assessing qualifications.

On the list of applicants page, use your workspace ribbon to adjust your filters for **Qualified**, **Unknown**, **Unqualified**, or **Entire pool**.

Unknown

Applicants found in this category **(color coded orange)** haven't been marked yet. Check in regularly and mark any new, completed applicants qualified or unqualified.

1. Using the Basic Qualifications filter on the ribbon, select "Unknown."

- 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.

- Sometimes the qualifications involve more than a highest degree, such as the PhD example given here. You may need to review the applicant's CV to see if the basic qualifications have been met.

2. Check the box beside the applicant name that you wish to mark. To select all applicants at once, check the master box at the top of the column.
3. Click **Meets** or **Does Not Meet**. This moves the applicant to the appropriate category.
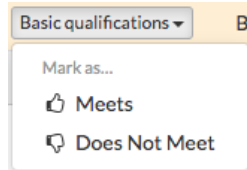
Qualified

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 applicant's page and committee reviewers will conduct their work from this view.

1. Using the Basic Qualifications filter on the ribbon, select "Qualified."

From the Qualified view:

1. Check the box beside the applicant name that you wish to mark. To select all applicants at once, check the master box at the top of the column.

2. Since you're already on the Qualified view, **Unknown** or **Does Not Meet** are your only choices.
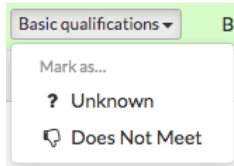
Note: You can revert a *qualified* applicant back to *unknown* if you discover required documents have been deleted from the application. If the required document is re-uploaded, the applicant will automatically move back to "Qualified."

Unqualified

The unqualified category **(color coded grey)** contains applicants who have been marked as "Does not meet basic qualifications." In this state they will not be considered for the position.

1. Using the Basic Qualifications filter on the ribbon, select "Unqualified."
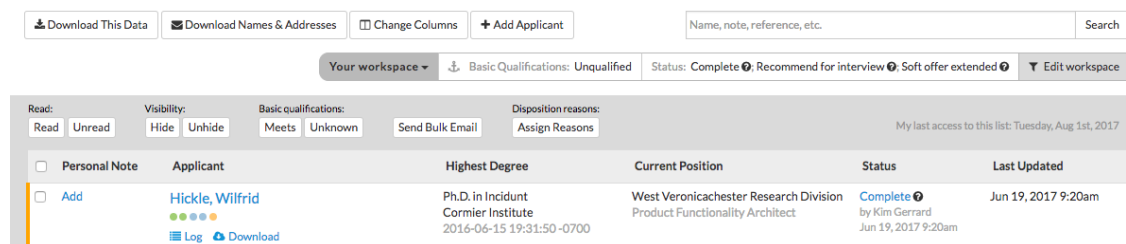
From the Unqualified view:

1. You may decide you need to move applicants out of this category. Check the box beside the applicant name that you wish to re-categorize.

2. Select **Meets** or **Unknown**. This moves the applicant to the appropriate category.
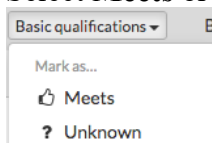
Entire pool

You can also mark applicants from the entire pool view **(color-coded blue).**

1. Using the Basic Qualifications filter on the ribbon, select "Entire pool."

From the Entire pool view:

1. Select **Meets**, **Unknown**, or **Does Not Meet**. This moves the applicant to the appropriate category.
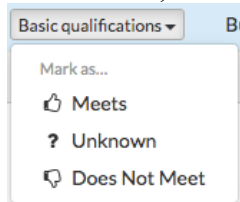
What does the search committee see? *Reviewers will be able to filter by the same color-coded categories. However, only analysts, committee chairs, and editors have the ability to mark applicants' qualifications as Meets, Unknown, or Does Not Meet.*

ASSIGNING DISPOSITION REASONS

Disposition reasons are an important component of the Search report and are essential in the event of a campus audit.

Disposition reasons may only be assigned by Analysts, Committee Chairs, or Editors. Reviewers can be given this permission by the analyst in the committee-building section of the recruitment.

Disposition reasons must be assigned to ALL applicants, both qualified and unqualified.
- The disposition reasons for unqualified applicants will defend why they weren't considered as viable candidates for the position.
- The disposition reasons for qualified applicants will justify why they didn't move forward in the hiring process.

Using the Basic Qualifications filter on the ribbon, select "Unqualified." Follow these same instructions for the "Qualified":

If no names appear, please return to the section of this manual, <u>Meets Basic Qualifications</u> to learn how to mark the qualified applicants.

1. Locate the applicant(s) and put a check in the empty box in their row. To select all applicants at once, check the master box at the top of the column.

2. With the applicants selected, click the "Assign disposition reasons" button in the actions row at the top of the list of names.

66 Assign disposition reasons

 A work screen opens with your selection of names in a list…

Assign reasons one-by-one:

1. Place your cursor in the applicant's adjacent box and select a reason from a choice list.
2. Multiple reasons are permitted.
3. Optionally use the comment field if needed.
4. Click "Done" to return to the applicant pool.

Assign reasons in bulk:
For large pools, it may be faster to mark reasons for multiple applicants at once. Follow these same instructions for assigning multiple *comments* at once.

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

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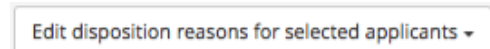
2. Check the reason(s) from the selection list.
   This time, the disposition reason(s) will be applied to all checked applicants at once. (You may still edit individual applicant's reasons one-by-one.)

3. Click "Done" to return to the applicant pool.

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.

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."

Update specializations for Rusty Steele

Any changes to selected specializations will be visible to the applicant.

☑ Violin
☑ Guitar
☐ Piano

Save changes   Cancel

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.

Documents Viewer

Curriculum Vitae   Download (Required)   Edit

2. Click **Replace/Remove**

Curriculum Vitae REQUIRED   ×

Curriculum Vitae added Sep 6, 2016 at 4:55pm, modified Oct 3, 2016 at12:47pm
PDF-misc.pdf   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 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 required CV) from a completed application mark the applicant "Incomplete." Incomplete applications are hidden from committees. If are review dates, this will push the applicant into the later review window, potentially jeopardizing their standing with committee reviews.

and

as a
will

there

- 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.

   Documents · Viewer

   Curriculum Vitae   Not yet provided **(Required)**   + Add
   Cover Letter   Not yet provided   + Add

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.

   Cover Letter   ×

   Document location

   | Inside Recruit | Outside Recruit |

   This document will be stored in UC Recruit and available to the search committee electronically.

   File

   Browse... No file selected.

   Description

   Add Cancel

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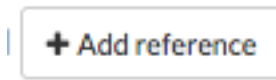
2. Provide the name of the reference, email, mailing address, affiliation to the applicant, and any other optional information.
3. You may upload the reference's letter at this time if it's available.

Reference letter
Browse...   No file selected.

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.

    Edit reference

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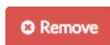
3. Read the screen warning and confirm when you are ready.

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.

    Edit reference

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."

George Stamos   Letter of reference not yet requested
    ⊞ Edit reference   ⌁ Request letter   ✚ Upload letter

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."

Send Letter Request ✕

To:
George Stamos <george@blah.bla>

Subject
Request for letter of reference for Xavier Breath

Body
Dear George Stamos,

You are invited to submit a letter of reference for Xavier Breath for the position of Mar 8th Professor Extraordinary Survey Banner at the University of California.

For more information about the position, see https://demo.recruit.ap.uci.edu/apply /JPF00249

❯ Log in information...

Signature
Thank you for your time.

Darkwing Duck
Department D
University of California

❯ Confidentiality statement...

[Send request] Cancel

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."

    ✚ Upload letter

2. Browse for the file on your computer it. Upload only PDFs or supported media file types.

Delete a letter

1. In the References section, click the link, "Delete letter."

    🗑 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."
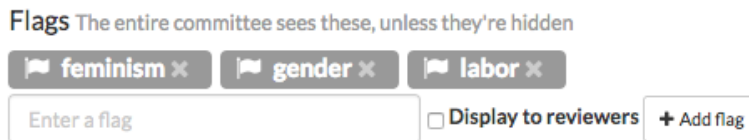
Scheduling/managing a visit

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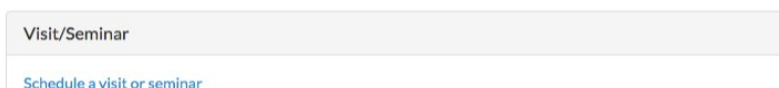
3. Enter a title, main event date, a summary, and candidate's bio into the form.

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

6. Enter the event title, location, and time into the form. 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"
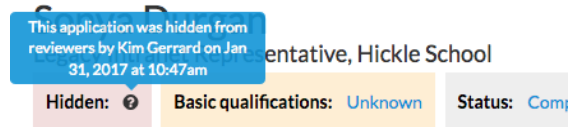
Applicant added indicator
Learn more in the section, "Add an Applicant"
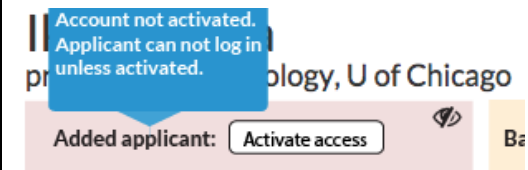
Part 3: Reporting

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*.

JPF00020   PolarDNA Researcher
Search info   Reports ←

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

Reports

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

Applicant Pool	3
Shortlist	0
Search Report	4
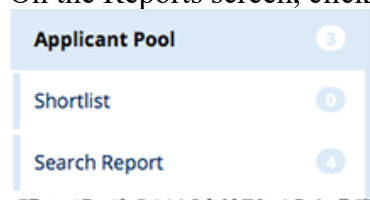
4. Click *Preview* to see the report before creating it. Make any changes necessary.

⚡ Preview

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

+ Create New Applicant Pool Report   **+ Create New Shortlist Report**

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

Create New Report

Recruitment Properties

Recruitment	Demo 4-3-15 Multiple search reports
Job #	JPF00160
Department	Department of Omnis Occaecati
Salary control #	477372
Field of study	Campus: Algebra
Title codes	1100: PROF-AY
Report type	Shortlist / ✓ Applicant Pool
Diversity data set	Tenured / SOE

Applicant Pool Statistics

# meets basic	16
# does not meet basic	2 will not be included in report
# basic qualifications unknown	0 will not be included in report. Consider reviewing before creating a report
# on shortlist	5

Create Report Cancel

Report Type. Drop down menu shows either Applicant Pool or Shortlist.

Applicant Pool Statistics. This region displays the number of *completed* applicants who have been marked as "Meets Basic Qualifications" and have submitted their survey on diversity. These survey-takers will be the only applicants in aggregated results, making this report in compliance with the US Department of Labor. If the count is zero, you must go back and mark the applicants who meet the basic qualifications. The count for shortlisted applicants is shown in this region too.

Note: For "Survey only" recruitments (those that have not been configured for online application management), a field is provided for the Analyst to type in the number of applications received outside of Recruit:

Applicant Pool Statistics
online applicants   0
applicants:
27

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

Success

New Report Successfully Generated.

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

● The "Date Generated" column keeps a running tally of all reports created throughout the search.

- The "Download" link opens a PDF of the report.
- Color-coded boxes indicate the status of the particular report's approvals.

Jan 14, 2015
Submitted on Jan 13, 2015

✔ 3 ⊘ 0 💬 9

[🔍 Approved] [⬇ Download]
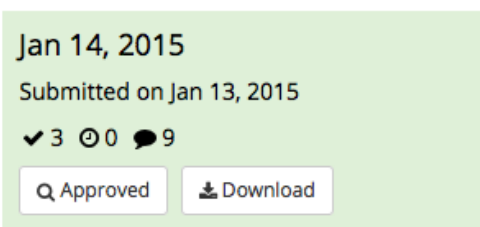
Applicant Pool Report

JPF01105 Super Best Job 2017

Another Math Department / A School of Aliquid BC Dee • Contact: Kim Gerrard

Position

Job number	JPF01105
Name	Super Best Job 2017
Salary control	477372
School	A School of Aliquid BC Dee
Department	Another Math Department
Field of study	Campus: Algebra / Campus: Accounting
Recruitment period	Jul 10, 2017 - Jun 1, 2018

Search & recruitment efforts

Search effort	Plan to work like sled dogs.
Actual search effort	We worked our fingers to the bone.

Applications & response rate

	Survey taken	Survey not taken	Total	Response rate
Included in report				
Meets basic & on time	26	1	27	96.3%
Not included				
Does not meet basic	2	2	4	50.0%
Qualifications are unknown	0	0	0	0.0%
Late	0	0	0	0.0%

Demographics

Availability cohort	Other Academic Positions
Availability data set	2010-2014 Campus data; 2015 Health Sciences data; 2011 Law data; 1983 - 2002 ALA data
Titles	001900: ACT ASSOC PROF-SFT-VM

Availability

Field of study	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
Campus: Algebra	74.0%	26.0%	2.5%	2.7%	6.7%	0.2%	12.0%	84.9%
Campus: Accounting	57.0%	43.0%	6.3%	3.3%	15.2%	0.7%	25.6%	71.9%
Average**	65.4%	34.6%	4.4%	3.0%	11.0%	0.5%	18.9%	78.3%

% of responses — Pool composition

	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
All applicants	52.9% (9/17)	47.1% (8/17)	17.4% (4/23)	21.7% (5/23)	34.8% (8/23)	17.4% (4/23)	91.3% (21/23)	8.7% (2/23)

% of total pool — Pool composition

	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
All applicants	33.3% (9/27)	29.6% (8/27)	14.8% (4/27)	18.5% (5/27)	29.6% (8/27)	14.8% (4/27)	77.8% (21/27)	7.4% (2/27)

Question response rate

	Gender responded	Gender decline to state	Gender no response	Ethnicity responded	Ethnicity decline to state	Ethnicity no response
All applicants	63.0% (17/27)	33.3% (9/27)	3.7% (1/27)	85.2% (23/27)	11.1% (3/27)	3.7% (1/27)

* The availability percentage for Minority Total includes multiple-race/ethnicity responses. The overall total may also contain additional small groups that do not have their own categories.
** 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.

Shortlist Report

JPF01105 Super Best Job 2017

Another Math Department / A School of Aliquid BC Dee • Contact: Kim Gerrard

Position

Job number	JPF01105
Name	Super Best Job 2017
Salary control	477372
School	A School of Aliquid BC Dee
Department	Another Math Department
Field of study	Campus: Algebra / Campus: Accounting
Recruitment period	Jul 10, 2017 - Jun 1, 2018

Search & recruitment efforts

Search effort	Plan to work like sled dogs.
Actual search effort	We worked our fingers to the bone.

Applications & response rate

	Survey taken	Survey not taken	Total	Response rate
Included in report				
Meets basic & on time	26	1	27	96.3%
Not included				
Does not meet basic	2	2	4	50.0%
Qualifications are unknown	0	0	0	0.0%
Late	0	0	0	0.0%

Demographics

Availability cohort	Other Academic Positions
Availability data set	2010-2014 Campus data; 2015 Health Sciences data; 2011 Law data; 1983 - 2002 ALA data
Titles	001900: ACT ASSOC PROF-SFT-VM

Availability

Field of study	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
Campus: Algebra	74.0%	26.0%	2.5%	2.7%	6.7%	0.2%	12.0%	84.9%
Campus: Accounting	57.0%	43.0%	6.3%	3.3%	15.2%	0.7%	25.6%	71.9%
Average**	65.4%	34.6%	4.4%	3.0%	11.0%	0.5%	18.9%	78.3%

% of responses — Pool composition

	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
All applicants	52.9% (9/17)	47.1% (8/17)	17.4% (4/23)	21.7% (5/23)	34.8% (8/23)	17.4% (4/23)	91.3% (21/23)	8.7% (2/23)
Serious consideration	66.7% (2/3)	33.3% (1/3)	20.0% (1/5)	20.0% (1/5)	40.0% (2/5)	0.0% (0/5)	80.0% (4/5)	20.0% (1/5)
Shortlist	66.7% (2/3)	33.3% (1/3)	20.0% (1/5)	20.0% (1/5)	40.0% (2/5)	0.0% (0/5)	80.0% (4/5)	20.0% (1/5)

% of total pool — Pool composition

	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
All applicants	33.3% (9/27)	29.6% (8/27)	14.8% (4/27)	18.5% (5/27)	29.6% (8/27)	14.8% (4/27)	77.8% (21/27)	7.4% (2/27)
Serious consideration	33.3% (2/6)	16.7% (1/6)	16.7% (1/6)	33.3% (2/6)	33.3% (2/6)	0.0% (0/6)	66.7% (4/6)	16.7% (1/6)
Shortlist	33.3% (2/6)	16.7% (1/6)	16.7% (1/6)	16.7% (1/6)	33.3% (2/6)	0.0% (0/6)	66.7% (4/6)	16.7% (1/6)

Question response rate

	Gender responded	Gender decline to state	Gender no response	Ethnicity responded	Ethnicity decline to state	Ethnicity no response
All applicants	63.0% (17/27)	33.3% (9/27)	3.7% (1/27)	85.2% (23/27)	11.1% (3/27)	3.7% (1/27)
Serious consideration	50.0% (3/6)	50.0% (3/6)	0.0% (0/6)	83.3% (5/6)	16.7% (1/6)	0.0% (0/6)
Shortlist	50.0% (3/6)	50.0% (3/6)	0.0% (0/6)	83.3% (5/6)	16.7% (1/6)	0.0% (0/6)

* The availability percentage for Minority Total includes multiple-race/ethnicity responses. The overall total may also contain additional small groups that do not have their own categories.
** 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.

Shortlist

Status	Applicant
Declined offer	Windler, Brennan
Offered	Mead, Margaret
Interviewed	Crist, Arvid
Recommend for interview	Emmerich, Flo
Recommend for interview	Hansen, Garrison
Recommend for interview	Kemmer, Margarita

---

* The minority total includes individuals who self-reported multiple race/ethnicity. When numbers don't add up: Those who selected multiple race/ethnicity are not included in the other individual race/ethnicity groups (not in AfAm, Hisp, Asian, NaAm), so the only place they are counted is in the minority total.
Therefore: Minority=AfAm+Hisp+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.

Applicant Pool	③
Shortlist	⓪
Search Report	④

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

Report	Approval	# of "Meets Basic" applicants	Response Rate ❓
📄 May 4, 2016 at 10:48am Saved	NOT SUBMITTED • Submit as new approval	4	100.0% (4/4)

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**.

    Are you sure you want to submit this report for approval? ✕

    This report will be submitted for a **new round** of approvals.

    Using workflow "**Working flows-Regression Test**", which includes the following steps:

    1. Committee Chair
    2. Equity Advisor

    You will be able to add steps after creation.

    If this is not the correct workflow, please contact Support.

    Yes, submit for approval Cancel

4. Make sure all roles are assigned names of people in those roles. If not, **specify a person**.

5. Add any additional steps or alternate approvers if needed.

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 approver 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.

   + Create New Applicant Pool Report　　**+ Create New Shortlist Report**

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

Report	Approval	# of "Meets Basic" applicants	Response Rate ❓
May 3, 2016 at 2:15pm Saved	PENDING • View approval request • Update approval 0/2 approved • 0 comments	16	100.0% (16/16)
May 5, 2016 at 11:05am Saved	NOT SUBMITTED • Submit as new approval	16	100.0% (16/16)

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

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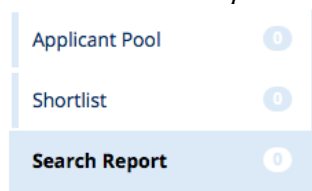
3. Click *Preview* to see the report before creating it. Make any changes necessary.

4. Click **Create New Search Report**.

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.

Current reports

Report

No current search reports. Before creating a Search Report:

- ✅ Fields of Study must be selected • Add now
- 🟠 Actual Search Efforts must be entered • Add now
- 🟠 Final Date must have passed

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.

Create search report   ×

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

* Report name

* Include applications who completed on or before

Jun 30, 2016 • 21 applicants   ▼

Before creating a search report for this application period:

🟠 17 applications need disposition reasons • See details

Create search report   Cancel

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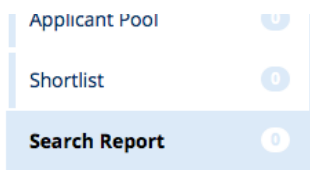
3. Click *Preview* and you'll see your changes will be evident.

4. Optional: Consider sending an FYI about the change to the approvers. Click Notify Approvers and type a message to email them.
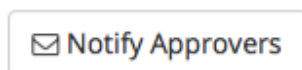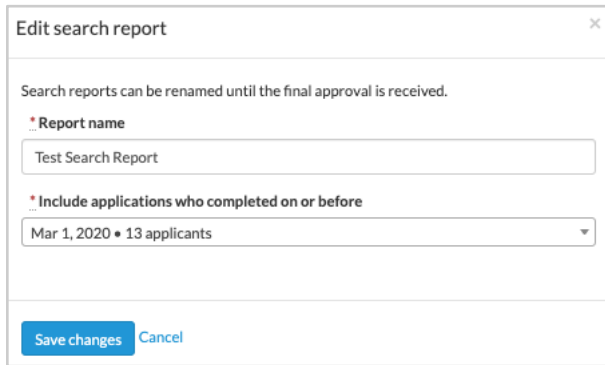
Review Date Changes on Search Reports

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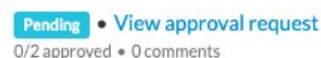
3. The Edit Search report screen opens.
4. Use the drop-down menu and pick the correct review date and **Save**.

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
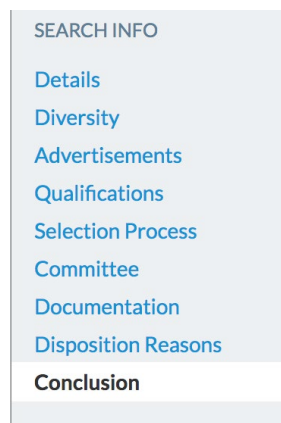
Conclude the search

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.

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

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 to sort.
- **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 filters & columns** button to customize your filters and columns.

- **Manage workspace:** 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.
- Refer to the section, Workspaces: Recruit's Filters, Columns, and Sorting.

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.

📖 Tour

Downloading waiver data

Academic units want to report on and learn from their past hiring, and Recruit's method of exposing data makes 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

Recruit will create a comma-delimited file, named "**waivers-yyyymdd-####.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**.

   ⊕ 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:

Position Information	Description
Position working title	This is the name of the waiver in the system. This field can't be blank.
Home department	This department will manage the waiver process. This field can't be blank.
Academic Year	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.
Position Duties	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.
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. This field is required before submitting the waiver for approval.
Candidate Information	**Description**
Candidate name	Place the name of the candidate in this field. This field is required before submitting the waiver for approval.
CV	Browse and upload the candidate's CV. This field is required before submitting the waiver for approval.
Is the candidate currently employed by the university?	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.
Current employee ID	If currently employed, provide the employee ID. This field is required before submitting the waiver for approval.
Effective date of initial appointment to current position	If currently employed, enter the effective date of the appointment. This field is required before submitting the waiver for approval.
Current appointment Department	If currently employed, select the department. This field can't be blank.
Title, Step, Percent time, current appointment start date and end date	If currently employed, supply this information about the current appointment.
Candidate email addresses	List all known email addresses for the candidate. This field is required before submitting the waiver for approval.
Candidate qualifications	Discuss the qualifications required to successfully fill the position, and how the candidate meets those qualifications.
Appointment Information	**Description**
Proposed appointment	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.
Department	Select department to which the candidate will be appointed. This field can't be blank.
Title	Select one title code from the list. This field can't be blank.

Step	Provide a step for this appointment.
Percent time	Enter the percent of time for this appointment.
Proposed appointment start date	Enter the start date for this appointment.
Proposed appointment end date	Enter the end date for this appointment.
Add another appointment	Use this link to add another appointment.
Justification Information	**Description**
Category	Categorize the type of waiver by selecting from the corresponding menu. The choices are divided by Senate Faculty vs. Non Senate Faculty and Other Academics. Choose "Other" if an option doesn't appear in the menu and explain using the free text field. This field is required before submitting the waiver for approval.
Grant Information	**Note:** The fields for grant information display only when the category is *Non-Senate Faculty* and *Other Academics PI/Co-PI/Leadership Status*.
Funding agency	Add the name of the grant funding agency.
Grant number	Add the grant number.
Salary from grant	Add the salary that was awarded from the grant.
Percent time working on grant	Add the % time the candidate worked on the grant.
Grant documentation	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.
Justification narrative	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.
Waiver duration	How long is the waiver valid? Set an expiration date.
Expiration type	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.
Expiration date	For Time-limited types, type an expiration date or use the date selector. Note: If the appointment continues after the waiver expires, a new

	waiver must be provided. Analysts will be sent an email notification before the expiration date in case they need to start a new waiver. The expiration date field is required before submitting time-limited waivers for approval.
Effective date	Type a date or use the date selector. **Note:** The appointment may not start before the waiver effective date. This field is required before submitting the waiver for approval.

History	Description
Discovered candidate history	There's nothing to add here. Recruit automatically looks for places in which the candidate's employee ID or any known email addresses have appeared.
Added history	Click the button to add as much information you have on any recruitment, waiver, or exemption put forth in the past for this candidate. **Note:** It's not necessary to repeat any discovered candidate history in this section. The information appears on the waiver PDF.
JPF#, SWR#, EXR#, or other reference number	If a recruitment, waiver, or exemption has been entered into the Recruit system (and it's not in the Discovered candidate history section), include the reference number in the box provided. Otherwise, provide an alternate identifying number to help with tracking.
Candidate name	Place the name of the candidate in this field.
Position	Include the position or working title.
Department	Select the name of the recruiting department from the drop-down list.
Source type	Select recruitment, waiver, or exemption. Provide the dates, approval status, etc.

Documentation Section	Description
Supporting Documents	Browse and upload one or more additional documents that help support 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.
Description of uploaded file	Provide a short description of the supporting document.
Comment	If needed, leave a comment about the document.

Tools Section: Activity Log and Delete Waiver	
Activity log	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.
Delete waiver	In the event that a search waiver was created in error, analysts can delete their search waiver. Waivers can be deleted by analysts only if it has not already been submitted for approval. Once it has been submitted for approval, only a Recruit administrator is able to delete the waiver. Waivers cannot be undeleted, even by admins.

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 When the search waiver is ready, submit it for approval

   - 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 required approvers.

○ 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.

⤓ Preview waiver request PDF

SUBMIT WAIVER REQUEST FOR APPROVAL

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

DRAFT When the search waiver is ready, submit it for approval

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

⬤ Candidate name must be provided • Add now

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 steps appears.
5. If the workflow seems incorrect, cancel and contact support. 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.

👤 Specify person

Communicating with approvers

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

Automatic Approver Emails: At each step, Recruit sends email to approvers that their approval is needed and the submitter (analyst) receives a copy.
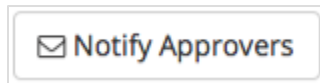
● The email includes a direct link to the approval screen where approvers may download the PDF, comment, and approve.
● As soon as Recruit detects an approval, the next in line is notified.
● After the last step approves, Recruit sends a notification to the submitter (analyst) with next steps to

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.)

1. Click the "Notify approvers" button.

   ✉ Notify Approvers

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

   - All approvers
   - Previous approvers
   - Current approvers
   - Pending approvers

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. ⤭ Reorder steps es. (example: "I know he's on sabbatical; let me fill in the interim chair.") If you name an alternate approver, only one person needs to approve. Click the "Add alternate approver" link and add the person.

   👤 Add alternate approver

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

   ⊕ Add step

   - When a step is added, it is **required** by default. Uncheck "Required" and the approver becomes **optional**. Optional approvers may be considered overseers or proofreaders, designed to be another pair 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

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:

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:

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

●

Locked Waivers

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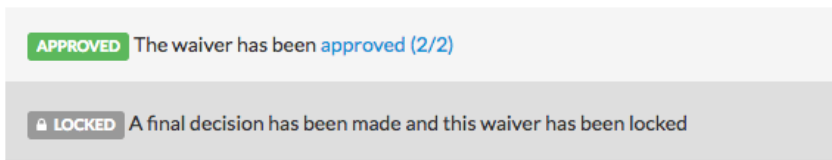
Waiver Conclusion

Concluding a waiver indicates that the entire waiver process is complete and provides the central offices (admins) with the information they need for reporting (hire status, employee ID, etc).

Analysts will be sent an email reminder based on the waiver's effective start date, with the subject line, **Please conclude your search waiver.**

1. Click the Conclusion tab in the menu.
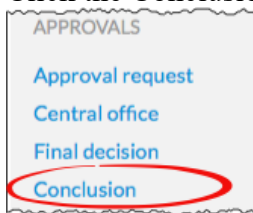
2. Complete the Hiring outcome section.

   a. If the candidate was hired, select "Yes" from the dropdown list. Enter the appointment start date and employee ID.
   b. If the candidate was not hired, select "No" from the dropdown list and briefly explain the reason.

3. Click "Conclude waiver" and confirm.
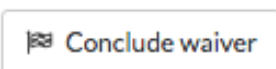
   ● Concluded waivers aren't displayed on the waivers grid by default.
   ● Approvers will not see concluded waivers in their queue.
   ● Concluding a waiver is reversible.

Part 5: Exemptions

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 to sort.
   - **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 filters & columns** button to customize your filters and columns.

   - **Manage workspace:** 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.
   - Refer to the section, [Workspaces: Recruit's Filters, Columns, and Sorting](#).

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.

📖 Tour

Downloading exemption data

Academic units want to report on and learn from their past hiring, and Recruit's method of exposing data makes doing so easy. Use filters, columns, and sorting to get at and use the data housed in Recruit and analyze it in Excel. Click the "**Download as CSV**" button

⬇ Download as CSV

Recruit will create a comma-delimited file, named "**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 Exemption**.

＋ Create new 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:

Position Section	Description
Category	Categorize the type of exemption by selecting from the corresponding menu. Choose "Other" if an option doesn't appear in the menu and explain using the free text field.
Home department	This department will manage the exemption process.
Effective start date	Enter the position's start date. The start date represents when the window opens and the candidate is expected to be working.
Effective end date	Enter the position's end dates. The end date represents when the window closes and the candidate is expected to stop working.
Candidate Section	Description

Candidate name	Place the name of the candidate in this field.
CV	Browse and upload the candidate's CV.
Employment status	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.
Candidate email addresses	List all known email addresses for the candidate.
Appointment Section	**Description**
Department	Select department to which the candidate will be appointed.
Title	Select one title code from the list.
Step	Provide a step for this appointment.
Proposed appointment start date Proposed appointment end date	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.
Percent time	Enter the percent of time for this appointment.
Add another appointment	Use this link to add another appointment.
History	**Description**
Discovered candidate history	There's nothing to add here. Recruit automatically looks for places in which the candidate's employee ID or any known email addresses have appeared.
Added history	Click the button to add as much information you have on any recruitment, waiver, or exemption put forth in the past for this candidate. **Note:** It's not necessary to repeat any discovered candidate history in this section.
JPF#, SWR#, EXR#, or other reference number	If a recruitment, waiver, or exemption has been entered into the Recruit system (and it's not in the Discovered candidate history section), include the reference number in the box provided. Otherwise, provide an alternate identifying number to help with tracking.
Candidate name	Place the name of the candidate in this field.
Position	Include the position or working title.
Department	Select the name of the recruiting department from the drop-down list.

Source type	Select recruitment, waiver, or exemption. Provide the dates, approval status, etc.
Additional Details section	**Description**
Additional information about the position or candidate	Provide any additional information regarding the position or candidate. This is optional.
Department comments	Any department comments can be added to this section. This is optional.
Documentation section	**Description**
Supporting documents (optional)	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.
Description of uploaded file	Provide a short description.
Comment	Leave a comment about the document.

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

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 an exemption is found at the top of its screen, marked by Draft, Pending, Approved, or Declined icons.

DRAFT When the exemption is ready, submit it for approval

- 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.

Preview exemption request PDF

SUBMIT EXEMPTION REQUEST FOR APPROVALS

1. Click the link in the status bar, **Submit it for approval**.

2. A list of approver 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.

⤮ Reorder steps ipprover

1. **Assign alternates.** (example: "I know he's on sabbatical; let me fill in the interim chair.") If you name an alternate approver, only one person needs to approve. Click the "Add alternate approver" link and add the person.

       & Add alternate approver

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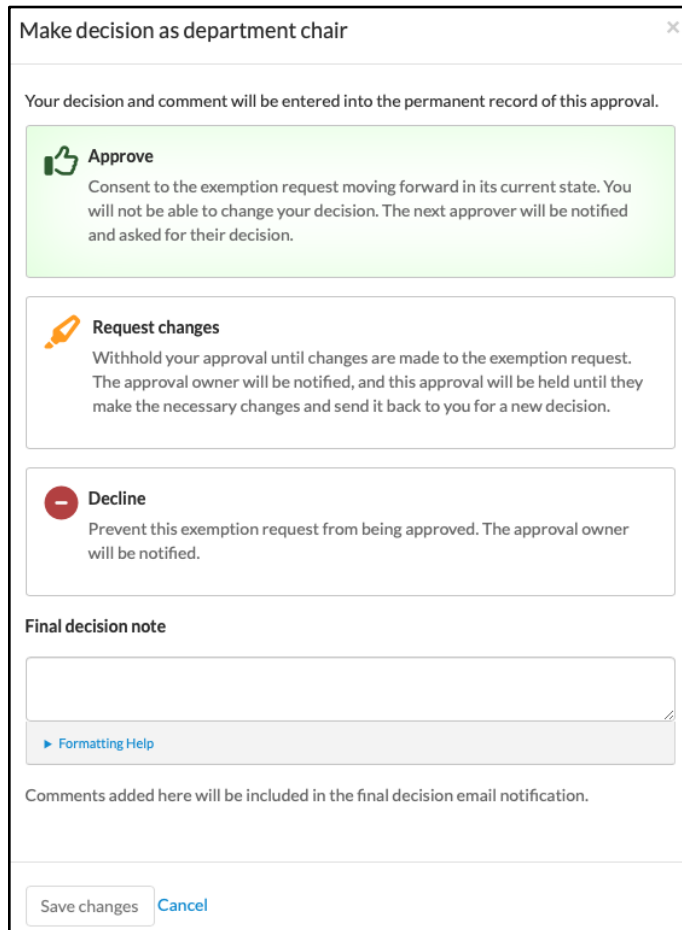
       ⊕ Add step

   - When a step is added, it is **required** by default. Uncheck "Required" and the approver becomes **optional**. Optional approvers may be considered overseers or proofreaders, designed to be another pair of eyes. If they neglect to approve the exemption, 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

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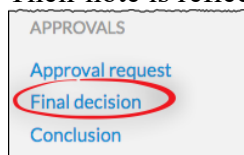
The following actions by the final authority will trigger an email to the analyst:

- 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

Concluding an exemption indicates that the entire exemption process is complete and provides the central offices (admins) with the information they need for reporting (hire status,employee ID, etc).

Analysts will be sent an email reminder based on the exemption's effective start date, with the subject line, **Please conclude your exemption**.

1. Click the Conclusion tab in the menu.
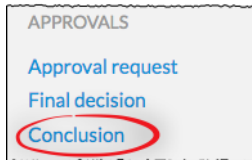
2. Complete the **Hiring outcome** section.

   a. If the candidate was hired, select "Yes" from the dropdown list. Enter the appointment start date and employee ID.
   b. If the candidate was not hired, select "No" from the dropdown list and briefly explain the reason.

3. Click "Conclude exemption" and confirm.

- Concluded exemptions aren't displayed on the exemptions grid by default.
- Approvers will not see concluded exemptions in their queues.
- Concluding an exemption is reversible.

Appendix A

HOW APPLICANTS USE RECRUIT

- Browsing applicants locate the recruitment on Recruit's apply page. Alternatively, they will click the direct link which is provided wherever the position is advertised.
- They will be asked to verify their email address to create their Portfolio account
- As they go through the application process, they fill in their contact information, highest degree information, current employment information, etc. After clicking "Save my information," 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 if they are not complete or complete but not submitted yet. If applying to a Review window recruitment, the application is locked once it has been submitted or the final date has passed.
- Applicants who have forgotten their passwords may change it on the apply page by clicking the link in the login box, "Trouble logging in?"
- Applicants may apply for multiple positions.
- "Contact Us" links appear in several locations before and after applicants are logged in. General and technical questions are sent automatically to the Recruit technical support line. 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 Portfolio

Recent applications ❓

Recruitment name	Application status
You have no recent applications	

Contact information ✏️ Edit

Mailing address	Not yet provided
Phone number	Not yet provided
Website	Not yet provided

Browse other positions

Account information

Change email address

Change password

Statements & disclosures

○ Equal Opportunity Employer
○ Accomodations for applicants with disabilities
○ Pay Transparency Policy Statement
○ Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act

More about UCI

○ UCI Homepage
○ UCI Today - news and events
○ UCI employment information

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.

🏠 Position Details | ✅ My Information | 🟠 My Files | 🟠 My References | 🟠 Demographic Survey

Contact information Update in portfolio

Name	Li, Mimi

Current employment information Update in portfolio

Affiliation/University	UCI
Title	Quality Assurance Analyst

Highest degree information Update in portfolio

Highest degree	PHD
Institution	UCI
Date obtained	June 2019
PhD Advisors	Not provided
Dissertation	Not provided

Specializations Update in portfolio

Specializations	Quisquam necessitatibus quaerat Corporis consequatur minima Porro eaque iste

My Files. Applicants upload the necessary files using the "Upload" link. If an applicant needs to mail in documents via U.S. Postal mail, this information is visible at the bottom of the page.

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 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.

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.

Provide Letter of Reference

Letter is for
Mimi Li

applying for
TechnoExpo Faculty Recruitment

in
Department of Techno Expo 2019 - A School of Demonstration

ADD A NEW LETTER

⊕ Upload a letter

OR WRITE YOUR LETTER NOW

✏ Type in letter

Applicants **can not** view your letter in Recruit, but will be notified that you have submitted it

- References may upload one file.
- The files must be pdf's.
- The files must be less than 50MB 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 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 the Recruit home page and click "UC Faculty & Administrators."
   - Once logged in, the Home screen will display the link to any pending approvals:

   ⏱ 1 approval request is available for your review ›

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

Type	Status	Read status	Name	Approvers	Requested on	Last approved	Updated at ▲
Applicant Pool Report	Pending	⏱	QA Framework Update (JPF00636) Approval details (0/1) Search info	→ Committee Chair	May 8, 2014 4:08pm Kim Gerrard		May 8, 2014 4:08pm
Applicant Pool Report	Pending	⏱	Cardiovascular Professor Extraordinaire (JPF00667) Approval details (0/1) Search info	→ Committee Chair	Aug 27, 2014 10:53am Kim Gerrard		Aug 27, 2014 10:53am

- Users can also click on the Approvals page at the top of the page, which will display all approval requests.

The approval request screen opens:

- **Download Plan button:** opens a PDF of the plan.
- **Add comment button:** Optionally add a comment or question for the analyst and/or other approvers. The analyst will monitor the approval requests, making any necessary modifications. Check the box "Mark approval as read" and you will be alerted on your approval dashboard when the item is changed, queuing you to review it again.

- **Approve Plan as [role] button:** This button approves the plan. Once approved, the approver's name appears on the screen with a "thumbs up" icon to cue other approvers that this document has passed this role's approval. Highlighting this icon with the mouse reveals the approval date and time:
- **> Approvers:** The expanded chevron (>) will display the identities of other approvers named in the workflow. An arrow icon by any name indicates who is next in line to approve:
- **> Comments:** The expanded chevron (>) will display any 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 *submitted* 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:

Margaret Mead
Central Security Liason, Marlenmouth Institute

🡅 Return to List of Applicants

Basic qualifications: Meets   Status: Recommend for interview ❓   Last updated: Apr 13, 2017 at 2:31pm   Mark as Read

Visit/Seminar Wednesday, May 31st, 2017

Contact Ms. Arlene Langworth with any questions about this visit/seminar

Title	Meet and Greet	✎ Edit
Summary	This is where the candidate comes to campus for the interview and tour.	
Bio	Dr. Mead is renowned in her field.	

➕ Add event

About ✎ Edit

Name	Margaret Mead
Username	nova.wolff3
Email	aptestmail+evelyn-0a5x30000q@uci.edu
Address	18413 Sidney Mountains
	Aniyahside, Hawaii 47004
Degree	Juris Doctor in Nihil at Vandervort School (2016-04-06 09:50:44 -0700)
Phd advisors	Mr. Telly Beer, Morton Hirthe
Dissertation	Fear of Crime and Urban Sprawl: Application of Wireless Mesh Networks.
Current position	Central Security Liason, Marlenmouth Institute

Specializations ✎ Edit

Specializations	Pariatur nam dolores
	Quia impedit temporibus
	Consequatur quasi cupiditate

Documents 🗗 Viewer

Curriculum Vitae	📄 Download (Required) ✎ Edit
Cover Letter	Not yet provided ➕ Add
Statement of Research	Not yet provided ➕ Add
Statement of Teaching	Not yet provided ➕ Add
Statement of Contributi…	📄 Download (Required) ✎ Edit
Misc / Additional	Not yet provided ➕ Add

Letters of Reference 2-4 required ➕ Add reference

Haylie Rosenbaum Jr.	📧 Edit reference 📄 Download letter 🗑 Delete letter
	💬 Culpa ut recusandae sunt.
Holden Rosenbaum	📧 Edit reference 📄 Download letter 🗑 Delete letter
	💬 Aut itaque sunt minima inventore.

Review 🔽 Download PDF Bundle

Personal note Not shared with the committee

Limit personal notes to those that are job-related. All personal notes become part of the search record and may be accessed through a public records request or during an audit.

☐ My number one pick.

✎ Edit personal note

Public comments The entire committee sees these

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

💬 Dr. Mead's research would be a good contribution to our department.

✎ Edit comment

No comments

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

🚩 lorem bixabay ✕

Enter a flag   ☑ Display to reviewers ➕ Add flag

The Parts of the Application:

1. Visit/Seminar —If a Visit/Seminar has been scheduled (by the analyst, editor or chair), the summary and schedule will appear 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.*

Viewer

- **Download lin*k:*** 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.*

  Cover Letter   Download

- **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). **☁ Download PDF Bundle**

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 provided 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.
   - Thank 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.

========================
Your Application Details
========================

Position Name: [recruitment name]
Department: [department name]
School: [school name]

Login link: [Link to applicant login]

<<< INSERTED FOR IRD RECRUITMENT >>>
To ensure full consideration, please complete your application by [review date].
<<<END OF TEXT FOR IRD RECRUITMENT>>>

<<< INSERTED FOR IRD RECRUITMENT if submitted after the review date has passed >>>
Note that at this time no additional review dates have been scheduled, so your application may or may not be considered by the search committee.
<<<END OF TEXT FOR IRD RECRUITMENT>>>

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

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

  [Link to contact form]

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

UC Recruit Team
University of California, XYZ

---

2. **Application Complete**

- Automatically sent to applicants a few hours after they complete their application.
- Will be suppressed if the 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.⌞SEP⌟
- Tracked in the applicant's log.

Subject: UC Recruit: Application Complete

Dear [applicant name],

<<<< INSERTED ONLY IF SURVEY HAS NOT BEEN SUBMITTED >>>>
Please complete a one-page survey to help us meet our obligation as a federal contractor.
   [Link to Diversity Survey]
<<<< END OF TEXT FOR THE NON-SURVEY TAKERS >>>>

Thank you for successfully submitting your application!
==================
Application Details
==================
Position Name: Adolescent Psychology Assistant Professor
Department: Psychology & Social Behavior
School: School of Social Ecology

Status: Submitted
Login link: [Link to applicant login]

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

If you need to withdraw yourself from consideration at any point, you can do so from the "Position Details" section of your application.

==================
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).⌞SEP⌟
- 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).⌞SEP⌟
- Tracked in the applicant's log.

5. An 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.⌞SEP⌟

- 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 7 day expire link.
   - Tracked the applicant's log.

Subject: UC XYZ Recruit: Access Your Application
Dear [applicant name], The application that was created on 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 7 days by using the following link: [Link to log in]   That link will add the application to your existing portfolio. Just make sure to claim the application before [Date]. OR That link will let you pick a password to set up your portfolio, which you'll use to log in. Just make sure to claim the application before [Date]   -- [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.

Subject: UC [campus] Recruit: Optional Document Requested

Hello [applicant name],

You are being sent this email because you applied to the following position at the University of California, [Campus]:

Recruitment: Assistant Professor - Atmospheric Chemistry
Department: Chemistry

Please note that the hiring department has requested that you provide a new, optional document:

[Optional document title]

You have until [date] to provide this document. Log into your application here:

[Link to log in to applicant dashboard]

[Custom text provided by department]

If you have any questions, please contact the hiring department directly:

[Link to contact form]

Thank you for your interest in the University of California.
--
[Analyst signature]
University of California, XYZ

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 the body that include: ApplicantFirstLastName, 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 the application process when the 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 resend 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 resend 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. For more information about the position, see [Link to the recruitment] At your convenience, please consider providing this letter electronically by using the following information: Please read the University of California's confidentiality policy regarding external letters of recommendation: Easy Log In Link: [Link to reference log in] If the Easy Log In Link isn't working, try logging in with the following information: URL: [Link to reference log in] Email: [email address] Token: [token information]   Thank you for your time. [Analyst signature] University of California, XYZ 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.

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 on-line 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.
- Analysts 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 on 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:

From ████████ Subject [Recruit] UC Irvine Recruit: Applicant Question for Assistant Professor – Ballet To ████████	**Note:** Always check the footer of the email you receive. The system provides time-stamps and other helpful sender information for supporters to address the email.

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

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

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

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

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

Figure E Mail is routed to the proper person when the applicant chooses from the drop-down menu. (person is logged in)

Appendix C

SPECIAL TOOLS FOR RECRUIT ADMINISTRATORS

1. Click **Admin** in the top menu bar:
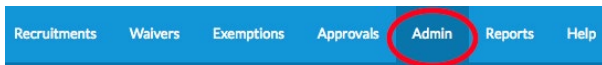
2. The suite of available administrative tools depends on your role/access rights If you don't have these tools, your role is not set to **Recruit Administrator**.

Find References

Search the Reference logs. This information is used to determine if:

- The token has been input incorrectly.
- The letter has not yet been requested.
- The applicant has revoked the request for a letter.
- The applicant has deleted the referee.

Find References

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

⬇ Download as CSV   [Name, email, applicant name, JP#, etc.]   Search

○ Unsaved workspace ▾   Notified: Notified ▾   ⚙ Edit workspace

Reference	Email	Token	Applicant	JP #	Token Status
Blake Douglas IV	emil_jaskolski@christiansengutkowski.com	891874af1ff78eb43dedad59e59879f0	Horaces Bailey	JPF00160	Active (Letter uploaded)

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.*

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). You can use this interface to review flagged files for PII, then replace or safelist them. Safelisted files will not be scanned again.

○ Unsaved workspace ▾   Identity Statuses: Flagged ▾   ⚙ Edit workspace

Filename	Identity Status	Resource	Resource Parent	Last Action	Resource Type
ducimus.pdf ⚒ Safelist ⇄ Replace	Flagged	Kautzer, Nakia	JPF00202: Comp Sci Project Scientist		ApplicationFile, Application: 347
ut.pdf ⚒ Safelist ⇄ Replace	Flagged	Sporer, Mustafa	JPF00211: Assistant Professor of MIMG		ApplicationFile, Reference: 614

Checking files for PII

1. Set the filters to show "Flagged".

Default workspace ▾   Identity Statuses: Flagged ▾   ⚙ Edit workspace

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."

ut.pdf
◆ **Safelist** ⇄ Replace

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."

ducimus.pdf
◆ Safelist ⇄ **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.

1. **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.
2. **3rd party software redaction tools:** Here are some secure tools:
    - Adobe Acrobat Pro (Mac and Windows)
    - 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

The purpose of this tool is to assume the role identity of any user listed in Recruit and it is useful for end-user support. Only **Recruit Administrators** have the access rights to use the Proxy tool. **Recruit Administrators** are the primary supporters for end-users.

1. Click the Admin tab in the top menu bar.
2. Click the link, "Proxy as user". (If you do not have this link, your role is not set to **Recruit Administrator**.)
3. Type in the person's username in the box.
4. Click the button, "Proxy as user".
5. A success message will appear in the middle of your screen.
6. Take caution not to make any changes when you are proxied in as another user.
7. Click the 'remove proxy' link in the top right to resume your real identity.

Hello, Charlie Committee Chair - Remove Proxy | Logout
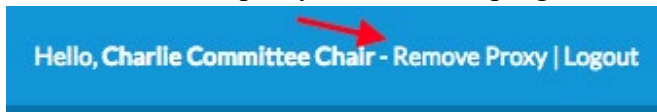
Fake Data tool

Use this time-saving tool to create data suitable for testing, training, and for screenshots. This tool is only available on Recruit's training site and testing site (QA). *Administrator* or *Trainer* access is required.

The tool automatically assigns recruitment dates, title codes, fields of study, documents/letter requirements, etc. as well as generating a list of applicants in various stages of completion.

1. Log into your campus Recruit **training or QA** site.
2. Click the Admin tab in the top menu bar.
3. Click the link, "Fake data". **Note**: If you do not have this link, your role is not set to **Recruit Administrator** or **Trainer**.
4. A modal opens with three choices.

Fake recruitment   Fake applications   Fake waiver
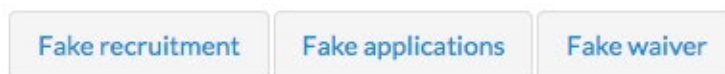
Fake recruitment

1. Click the Fake recruitment tab. This will let you create a fake recruitment from scratch and add any number of applicants.
2. Give the fake recruitment a name and choose a department.
3. Fake recruitments always have 3 named applicants, all of whom have a completed diversity survey.
4. Use the form if you want to add more, specifying their states of completion as well as the survey participation rate.
5. When you click the "Create fake recruitment" button at the bottom, the tool generates a fake open/closed/final (OCF) recruitment with all the necessary attributes. It may take a few minutes

to process dates, insert title codes, fields of study, applicant requirements, survey responses, etc., so please be patient.

Fake applications

1. Click the Fake applications tab. This will let you inject applicants into any of your already existing recruitments.
2. Click the drop-down in the Recruitment field and begin typing the JPF# or the recruitment's name. When it appears in the list, select it.
3. Use the form to specify the number of applicants, their states of completion, and the survey participation rate.
4. Click the "Add applications" button at the bottom. The tool generates fake applicants in various states of completion based on how you've filled out the form.

Fake waiver

1. Click the Fake waiver tab.
2. Give the fake waiver a position working title and choose a department.
3. Choose which status you want the waiver in:
   - Draft (newly created)
   - Ready to submit (all required fields filled)
   - Submitted (but seen by no approvers)
   - Approved (by the only approver)
   - Declined (by the only approver)
4. When you click the "Create fake waiver" button at the bottom, the tool creates a fake waiver so you don't spend time setting it up from scratch.

Availability Data

Admins may look through the complete and current numeric availability data that Recruit receives from various data sources (SED, AAMC, AALS, IPEDS). 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 too new to have any data or it's no longer a field offered to survey-takers.

Availability Data for 2015 - 2016

[Other Academic Years ▾]

The following is the complete numeric availability data for 2015 - 2016. 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.

[Go to a data source… ▾]

Campus: Other Academic Positions   Jump to top

Field of study	Male	Female	African American	Hispanic	Asian	Native American	Minority Total ❓	White	Other
Accounting	284	206	28	17	69	5	119	364	7
Acoustics, optics/phototonics	373	94	17	18	52	5	92	366	9
Aerospace, aeronautical and astronautical engineering	701	121	28	48	85	4	165	638	19

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.

     [⚙ Edit workspace]

   - **Manage workspace:** Hover over the end cap of the workspace ribbon to save & name your workspace, rename, or delete it.

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**.
4. This will create a comma-delimited file, "user-roles-yyyymmdd-####.csv" that you may open and analyze within 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.

Create and Edit a Post
1. Click the Admin tab in the top menu bar.
2. Click the link, "Manage Home Page News". (If you do not have this link, your role is not set to **Recruit Administrator**.)
3. On the Home Page News Manager page, click the button "Create News Item".
4. Fill in the Subject Line.

5. Use the drop-down selector to establish the date the post should appear. Schedule future posts if necessary.
6. Compose your post in the content field. This field supports <u>Markdown</u>, a simple way to style your text. Click the **Formatting Help** link to learn how.

Editing a News Item
1. On the Home Page News Manager page, select the link "Edit" beside the item.
2. Fill in the required fields.
3. Use the drop-down selector to establish when the item should appear.

Removing and Archiving News Items
1. On the Home Page News Manager page, select the link "Archive" beside the item.
2. The item will display in the Archived News Items section.
3. Re-post the item by selecting "Unarchive".

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 lets Admins assign roles, edit existing roles, and remove user access.

Adding a new Role for a User

1. Use the "Manage User Roles" tool. (If you do not have this tool, your role is not set to **Recruit Administrator** or **Recruit User Manager**).
2. Click the button, "Add Role for User".
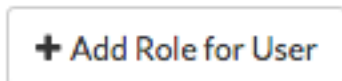
   + Add Role for User

3. The Add role for user window opens.
4. Enter the person's name, email address, or campus ID into the User field.
5. Highlight a role from the drop-down list. Note: The list includes all possible roles in the system. You will not likely be assigning most of them.

* Role

Please make a selection

Provost

Recruit Administrator

Recruit Analyst

Recruit Analyst (No Reports)

Recruit User

Recruit User Manager

6. Highlight a Resource type from choices presented.

* Resource type

Tool	School	Department	Recruitment	Waiver request	Exemption request	Committee

7. Depending on the selected Resource type, you will be prompted to select a corresponding school, department, JPF#, SWR#, EXR#. If you select "Tool" as the Resource type, please select "Recruit" when prompted.
8. To save, click the button, "Add user role".

Add user role

Editing a User Role

1. Use the "Manage User Roles" tool. (If you do not have this tool, your role is not set to Recruit Administrator or Recruit User Manager).
2. Enter the person's name, email address, or campus ID into the lookup box and click "Find."
3. Click the "Edit" link below their name. If the user has more than one role in the system, click the corresponding Edit link for the role you wish to change.
4. The Edit user role window opens:

Full Name	UCInetID	Role	Resource Type	Resource Name
Natalie Abbott	cooper_purdy3	Diversity Office Director	School	Currently: recruit Save & Change

   o   To change the user's Role, choose a new role from the drop-down list.
   o   To change the Resource type, choose from the drop-down list.

5. Click the "Save & Change" button. Depending on the selected Resource type, you will be prompted to select a corresponding school, department, JPF#, SWR#, EXR#. If you select "Tool" as the Resource type, please select "Recruit" when prompted.
6. Click "Save" when done.

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
1. Find the school listed on the page and click the link, "Add Department".
2. Fill in the name of the Department or Institute.
3. You will need to find out the department code, which is typically the Payroll home department code.This number should correspond with the "department code" column of the user data feed..
4. Click "Add".
5. Use the "Edit" link to change this information.

Deleting a Department

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 the total number of recruitments and associated user roles.
1. Scroll to the department and click the button, "Delete."
2. Confirm the deletion.

Renaming a School:
1. Scroll to the School and click the link, "Edit School".
2. Fill in the name.
3. The School identifier (a.k.a. "abbreviation") is any short alphanumeric combination used for sorting Schools on various pages throughout Recruit.
4. Click "Save changes".

Adding a New School:
1. Scroll to the bottom of the page and click "Add another school..."
2. Fill in the name.
3. Once again, The School identifier (a.k.a. "abbreviation") is any short alphanumeric combination used for sorting Schools on various pages.
4. Click "Add".
5. 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 an approval that will use this workflow.

* Name

Search Plan and Advertisement (Regular Ranks Faculty FTE Position)

3. Use the drop-down selector and choose a context: Search Plan, Applicant Pool Report, Shortlist Report, Search Report, Search waivers, or Search exemptions. Select "All" to have a catch-all workflow when the other workflows you've designed won't fit for whatever reason.

Context

Search Plan

4. Choose to apply this workflow to specific schools or choose All Schools to apply globally.

Schools

⦿ All schools

◯ Only in school

5. For even more granularity, you may add a Title Code condition.

Title Codes

⦿ All title codes

◯ Only certain title codes

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

Recruitment Type

◯ Both Senate and non-Senate

⦿ Only Senate

◯ Only non-Senate

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

+ Add step

8. ...and choose the role from the drop-down selector. Unchecking the "required" box makes a step optional.

Add step   ✕

* Role

Dean's Analyst

☑ Required

Add Step Cancel

9. Click "Add Step" when finished. 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 be 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".

2. Uncheck the corresponding boxes to restrict Analyst's abilities. When restricted, Analysts won't have the links "Reorder steps" or "Add step" in any workflow. Restrictions will take effect immediately, affecting any in-progress approvals.

3. 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.
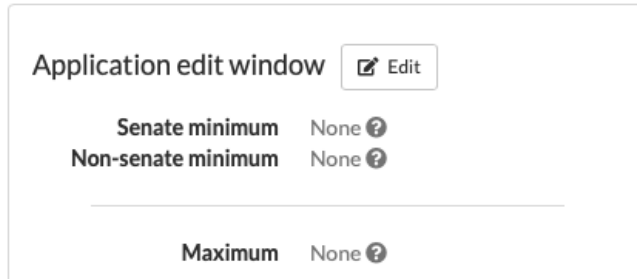
4. Save changes when satisfied with your settings.

Recruitment checkpoints

Application edit window

Recruit administrators can set the duration policy for the campus. The admin can set the minimum and maximum length of a recruitment, though Recruit analysts may also request an exception from the campus admin.
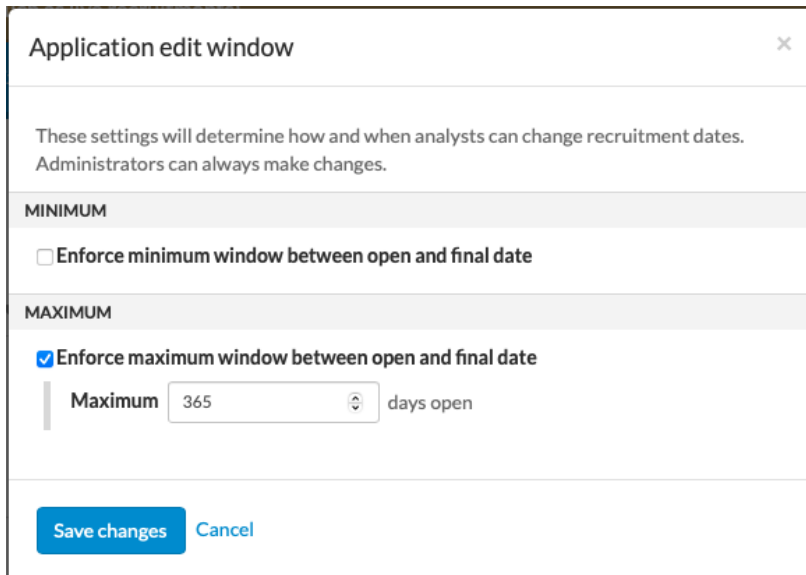

To set the maximum window between the open and final date:

1. Click the "Enforce maximum window" checkbox.

2. Enter the maximum number of days in the field.
3. Click **Save changes** when done. The settings will take effect immediately.

Recruit admins can also set the minimum window between the open and final date:

1. Click the "Enforce minimum window" checkbox.

2. Enter the minimum for Senate recruitments and Non-senate recruitments in their respective fields. Note that recruitments with both Senate and Non-senate title codes will use the Senate minimum.

3. Click **Save changes** when done. The settings will take effect immediately.

Additionally, admins can choose to enforce the minimum window between the open and close date (OCF) and/or the open and initial review date (IRD).

1. To enforce the minimum windows, check the box next to the respective boxes.

Search plan submission

This tool allows Recruit Administrators to decide whether a field is optional or required for analysts to complete before they submit Search plans for approval. The settings chosen here will impact the Search plan checklists for draft recruitments site-wide.
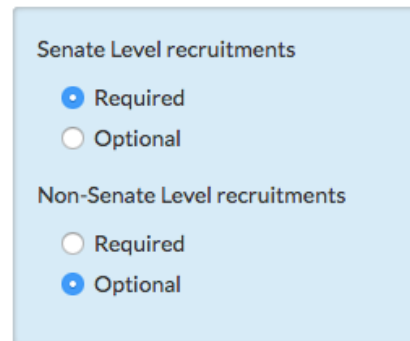
1. Click the Edit button.

2. Select the field you wish to change then make your selections for Senate and Non-Senate recruitments.

3. When set to Required, the field will be in the Search plan checklist and the information must be filled in before the Search plan can be submitted for approval.
4. When set to Optional, the field will not be necessary for the Search plan and won't be part of the checklist.
5. Click **Save changes** when done. The settings will take effect immediately.

Search report submission
This tool allows Recruit Administrators the ability to enforce the completion of the committee chair survey before a search report can be generated.

1. Click the Edit button.

2. Select the committee chair survey and set it to Required or Optional.

3. Click **Save changes** when done. The settings will take effect immediately.
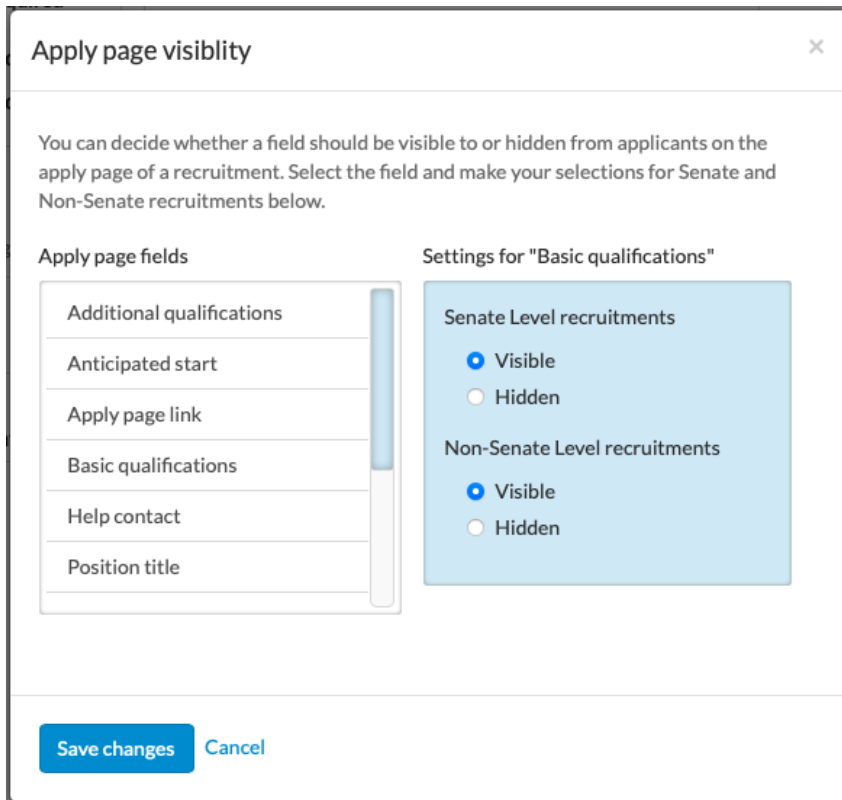
Apply page configuration
Customize the fields visible on the apply page of your recruitments for your campus.

Apply page visibility
Choose which fields will be visible to applicants on the recruitment ads based on if they are Senate or Non-senate.

1. Click the Edit button.
2. Select the field whose visibility you wish to change
3. Choose if it is visible on Senate level, Non-senate level, or both Senate and Non-senate recruitments.

4. Click **Save changes** when done. The settings will take effect immediately.

Campus standard text

Add customized text that will be appended to recruitments, based on their Apply page visibility settings. This text is typically used for the EEO tagline or the UC smoke-free policy.

1. Set the standard text's visibility in the Apply page visibility tool.
2. Click the Edit button for the Campus standard text tool.
3. Enter text that you wish to be appended to recruitments, based on the visibility setting.

4. Click **Save changes** when done. The settings will take effect immediately.

Campus qualification definitions

Edit the help text for qualifications that appear to both analysts and applicants. Basic qualifications are defined by the OFCCP and only non-substantive changes should be made.

1. Click the Edit button for the Campus qualification definitions.
2. Enter text changes that you wish to make on all qualifications fields on all recruitments.

3. If you wish, you can select the Default option to reset the qualification definitions to their original text.
4. Click **Save changes** when done. The settings will take effect immediately.

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
Admins can add a new waiver category to the justification list by following these steps:

1. Click "Edit" in the Waiver categories section.

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

3. Enter the name of the new category
4. 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.

Urgent Hire	Add
	Cancel
This is only applicable for urgent non-senate hiring needs.	

5. Click "Add"
6. Click "Save changes".

After adding the category, it will immediately be available on the waiver Justification page in the Category menu. Note that once a category is in use by a waiver, it cannot be edited. If edits are desired, the category must be archived and a new waiver category must be created in its place.

Archiving a Waiver Category
Admins can also archive waiver categories that are not acceptable. To archive a category, follow these steps:

1. Click "Edit" in the Waiver categories section.

Waiver categories   ☑ Edit   👁 Show archived

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

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

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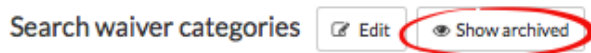
Grant information
Admins can select which search waiver categories will allow the optional addition of grant information. Once a category has a waiver with grant information entered, the grant information option cannot be removed.

1. Click "Edit" in the Grant information section.

Grant information   ☑ Edit
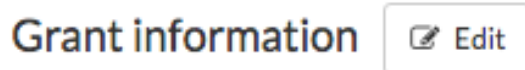
2. Check all the search waiver categories that should allow grant information to be entered.
3. Click "Save changes.

Exemptions Configuration

Recruit administrators may want a smaller, stricter set of exemption categories for their campus than the default set. Conversely, they may also wish to add new categories to the default set. For this, the exemptions admin tool allows campuses to customize their list of acceptable exemption justification categories.

Adding an Exemption Category
Admins can add a new exemption category to the category list by following these steps:

1. Click on "Edit" in the Exemption Categories section.

Exemption categories   ☑ Edit   👁 Show archived

2. Click the "Add a category" link.

3. Enter the name of the new category
4. Optional: Click "Add description" to add a brief description of the exemption category. This will display to analysts when they choose the category during exemption creation.

True Visitor	OK
☰ 📖 This is only applicable to true visitors. Contact your AP office for further details.	Cancel

5. Click "Add."
6. Click "Save changes."

After adding the category, it will immediately be available on the Exemptions Category menu in the Position tab. Note that once a category is in use by an exemption, it cannot be edited. If edits are desired, the category must be archived and a new exemption category must be created in its place.

Archiving an Exemption Category
Admins can also archive exemption categories that are not acceptable. To archive a category, follow these steps:
1. Click "Edit" on the Exemption Categories section.

Exemption categories ☑ Edit   👁 Show archived

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

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

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 settings for site-wide default behavior.

Publishing plans as recruitments

New plans begin in a draft state to allow review before publishing to the wider world. Who can publish a plan?
◉ **All Recruit Analysts**
   If you can create a recruitment plan, you can publish it to the world.
○ **Recruit Administrators only**
   All recruitments are published by a central administrator.
[Update]

Applicant pool and shortlist reports management

Applicant Pool and Shortlist reports contain demographic information on a recruitment's applicant pool. Who manages them?
◉ **All Recruit Analysts**
   Recruit Analysts are responsible for creating and managing reports, and are allowed to see them.
○ **Recruit Administrators only**
   All reports are created and managed by a central administrator.
[Update]

Demographic count visibility

Sensitive demographic counts in the diversity report are visible to:

○ **All equity and diversity roles**

Demographic counts will appear only to 'Equity Advisors', 'Diversity Analysts' and 'Diversity Office Directors'

◉ **Equity roles, diversity roles, and Recruit analyst role**

Demographic counts will appear to the above, plus Analysts

[Update]

Change an applicant's self-selected level

Applicants will sometimes apply to the wrong level. Who can change their level?

○ **All Recruit Analysts**

If you can manage the recruitment's levels, you can change the applicants within them.

◉ **Recruit Administrators only**

Level changes must be done by a central administrator.

[Update]

Conclude canceled recruitments

Canceled recruitments can be concluded by:

○ **All Recruit Analysts**

Recruit Analysts can conclude canceled searches without administrator review.

◉ **Recruit Administrators only**

An administrative review is required to conclude.

[Update]

Cancel approval requests

Approval requests can be cancelled by:

○ **All Recruit Analysts**

If you can submit an approval request, you can cancel them.

◉ **Recruit Administrators only**

Approval requests can only be cancelled by a central administrator.

[Update]

Bulk downloads for basic qualification evaluation

When basic qualification evaluations require applicant material, bulk downloads must be allowed for applications that are not already marked as meeting basic qualifications. Allow these early downloads from the following roles:

○ **All Recruit Analysts**

To facilitate basic qualification evaluations across campus, allow all analysts to download material early

◉ **Recruit Administrators only**

Basic qualification evaluations do not normally require application materials, so only administrators need early access

[Update]

Manage late and incomplete applications

These applications should not be visible to anyone making a hiring decision. Who can see them?

🔵 **All Recruit Analysts**

Analysts need to be able to add applications and view late and incomplete ones, in order to provide support to applicants.

⚪ **Analysts and Staff Editors**

Also allow the Editor (Staff) role access

[Update]

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 Recruit technical support at UC Irvine (ucrecruit-support@uci.edu).

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.
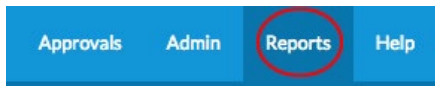
- The gray "cards" are pre-built report templates, provided by the system.
- These are based on commonly used UCOP reports or for applicant diversity data analysis.
- *Note:* department and school analysts will not have these templates.
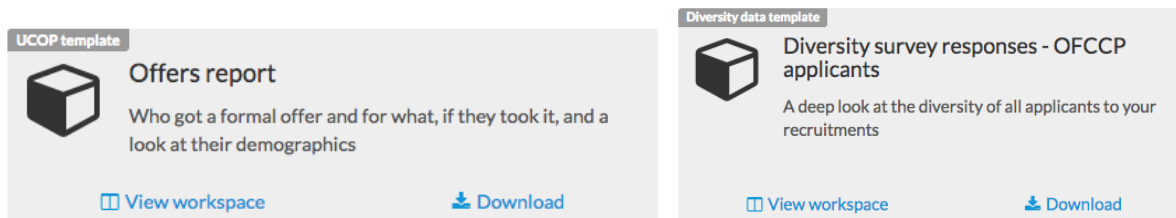
- Saved workspaces are shown on blue cards.
- Cards are grouped by their respective grids from where their data is drawn.
- View these workspaces or download their corresponding .csv to build a spreadsheet.
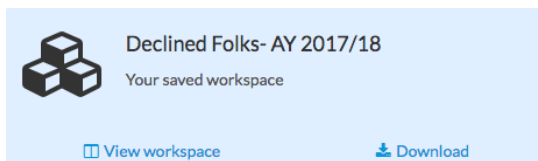
As your reporting needs grow and change, add new workspaces or alter your existing workspaces and templates. Your additions and changes will be reflected here, on the **Reports** page.