Academic Personnel Office and Equal Employment and Affirmative Action

AP RECRUIT APPLICANT MANAGEMENT USER GUIDE

Creation Date: October, 2015
Revision Date(s): August, 2018, July, 2017

This User Guide is a supplement to the AP Recruit User Guide.

Before You Start

AP Recruit Log In

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

UCR AP Recruit Home Page

TABLE OF CONTENTS

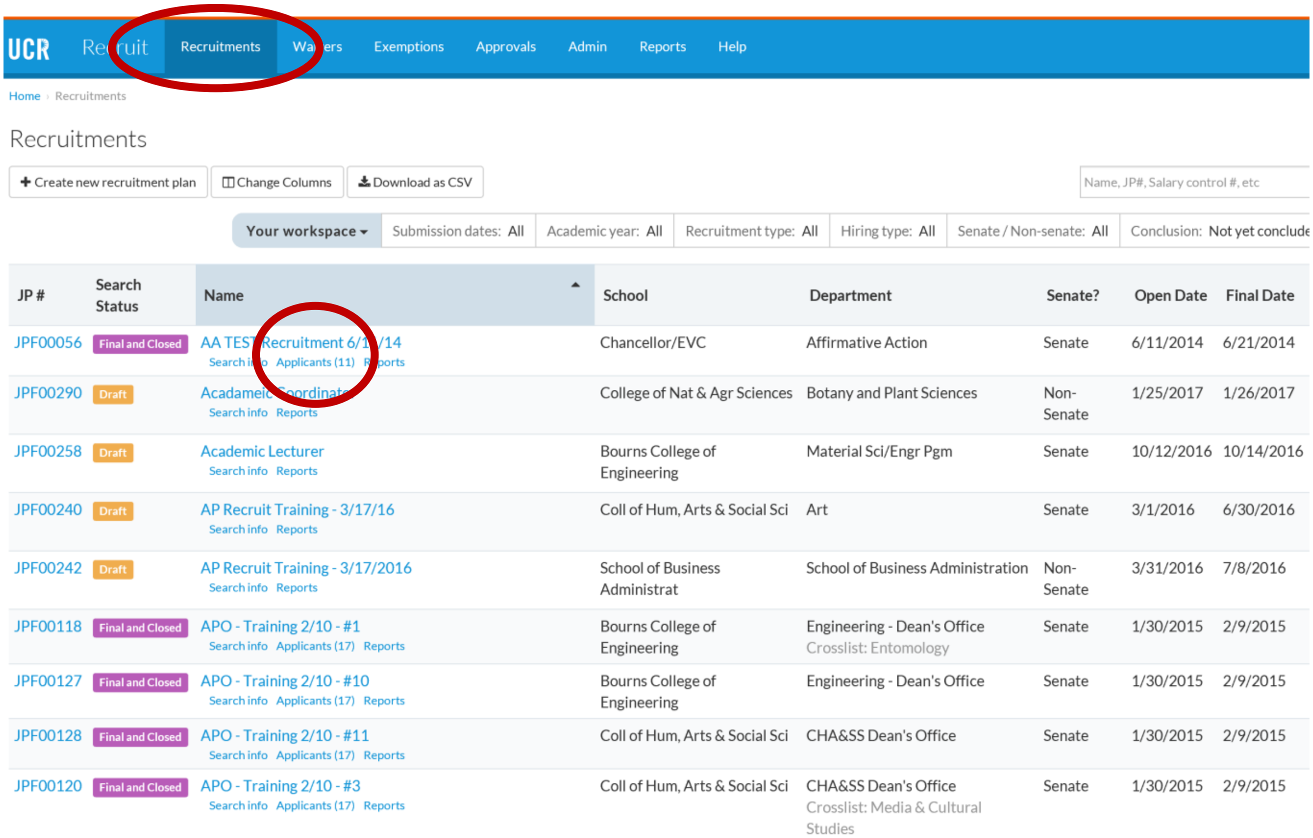
PART 1 – MANAGING THE RECRUITMENT AND APPLICANTS

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

A. Accessing Recruitment and Accessing Applicants

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

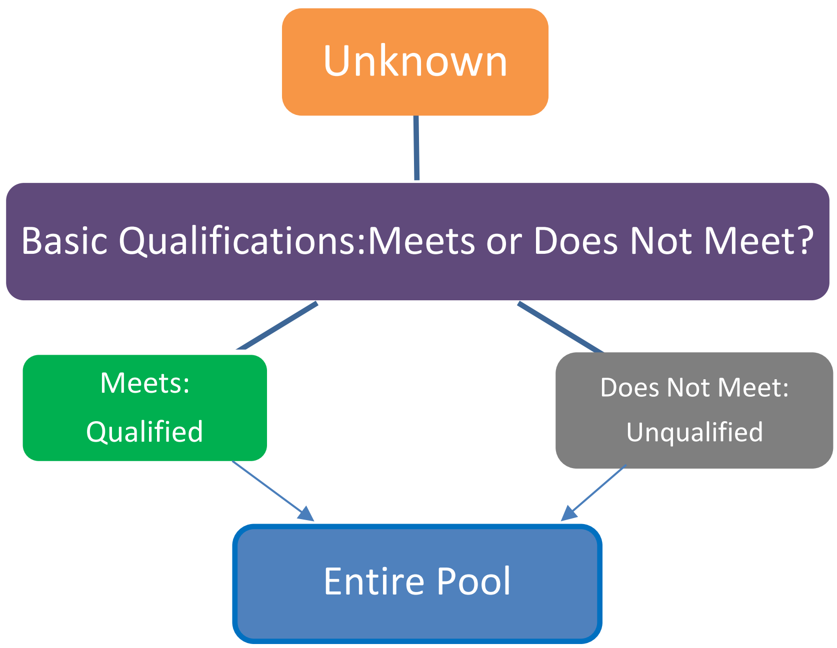
You may access the applicant pool via the **Recruitments** page via the **Applicants** link. The number of applicants is displayed in parenthesis.



B. Basic Qualifications

The first order of business is to differentiate applicants who meet the basic qualifications from those who do not. Analysts, Chairs, and Editors all have this functionality. This is needed in order to produce an accurate Diversity Report that meets the requirements of the U.S. Department of Labor/ Office of Federal Contractor Compliance Programs (OFCCP).

IMPORTANT: Always use objective, non-comparative, relevant, and verifiable criteria. Contact Equal Employment and Affirmative Action (EEAA) at affirmativeaction@ucr.edu for help deciding which applicants meet or do not meet basic qualifications.



As soon an applicant applies, Recruit places them in the Unknown category, color-coded **Orange**. From here:

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

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

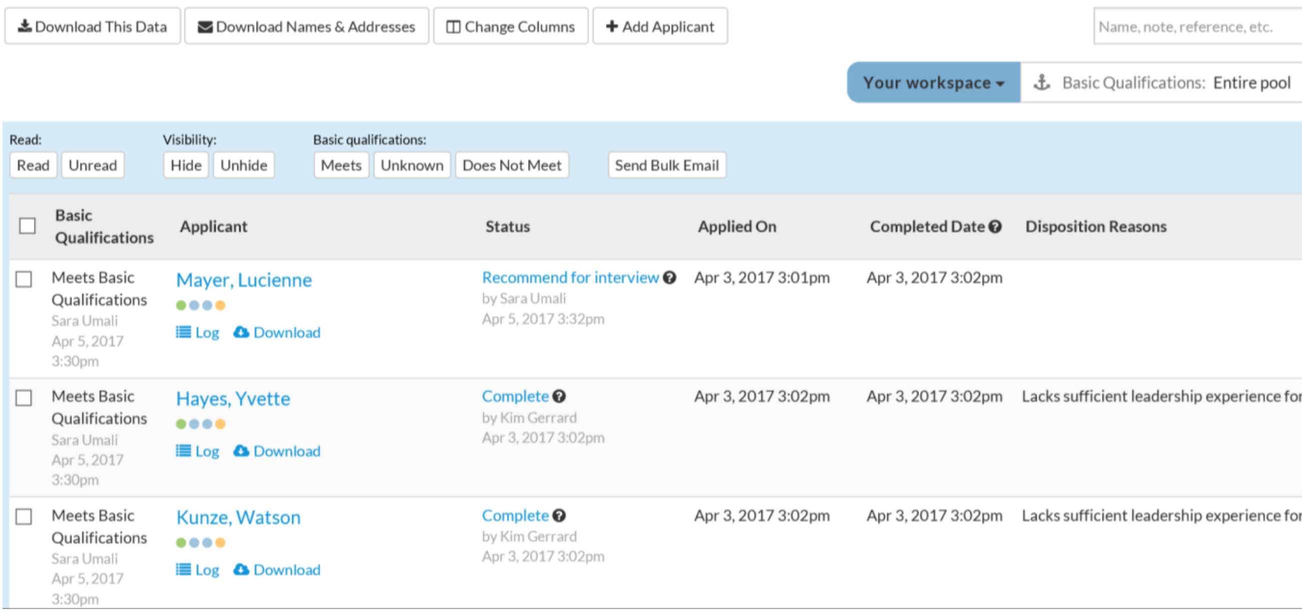
C. Tools to Use With the Applicant Pool

1. **Column Sorting** – click directly on most column headers to sort the applicant list
2. **Search Box** – type the name of the applicant in the Search box and hit enter to find a specific applicant
3. **Edit workspace** – use the Edit filters & columns button to customize filters and columns. See Filters, Columns, and Sorting video for more information: link. A Workspace User Guide is also available link.
4. **Download Applicant Data** – this is a useful tool to create lists; Recruit will build a comma-delimited file consisting of the applicant/applications list and the data fields that have been pre-selected from the column options.
5. **Mark as Read** –this is a way for you to check off applicants that have been reviewed. The feature is available to all users with applicant viewing rights but the checkmarks are private and not viewable by one another.
6. **Hide/Unhide** – only Analysts, Chairs and Editors have this tool. Recruit never deletes an application but "Hide" comes close. This may be useful if an applicant has applied to the wrong position or applied twice. When you hide an application, it's hidden from everyone else too.
7. **Add Personal Note** – this is a way to jot yourself a note about an applicant. The feature is available to all users who can view the applicants. Notes should be limited to those that are job-related, as they become part of the electronic record.
8. **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.
9. **Email Applicants** – use a template to compose a single message to send to one or more applicants. Only Analysts, Chairs and Editors have this tool. To do this:
   - First, put a check in the empty box beside all of the name(s) of applicants you wish to contact. A check in the top header box will select all names on that page.
   - Then click "Send Bulk Email" in the row at the top of the list of names.
   - A template opens. The "From" line defaults to the logged-in user (the Analyst, Chair or Editor). If this line is edited, then the actual message received by the applicant will appear to come from that person. To personalize the template, you may insert variables into the subject line or message body, for example: {ApplicantName}, {Username}, {ApplicantCompletedDate}, {RecruitmentName}, etc.
   - Click Preview Mail.
   - Click Send Email when ready. This action is immediately noted in the applicant's log.
10. **Applicant Log** – this is a record of time-stamped activity per applicant

D. Managing Applicants

1. To View

Make sure you are viewing the entire pool. **Click on Entire Pool**. This will display all applicants. (Committee reviewers will see only completed applicants).

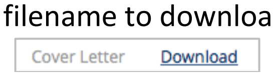


Click on the applicant's name to access his/her documents.

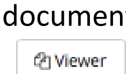
There are 3 different ways to view the documents:

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

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



c. Viewer – this option opens the applicant's documents within the browser frame. The document viewer tool may be affected by browser versions and third party PDF readers.



Note: The Entire Pool view respects any filters the user has set. If you see unexpected results, then take a look at your filters and clear them if necessary. At the bottom of the list, you'll be reminded about any filters you may have set and you can clear them with the button, Remove all Filters.

2. **Managing an Applicant's Documents**

Analysts, Editors, and Chairs may manage applicant's documents. Click the applicant's name and look for the Edit button or Add Reference to manage an applicant's documents.

Let's say an applicant needs to send in materials by regular U.S. mail and now the documents must to be uploaded into Recruit. This would require that you scan in the documents beforehand and save them as PDFs.

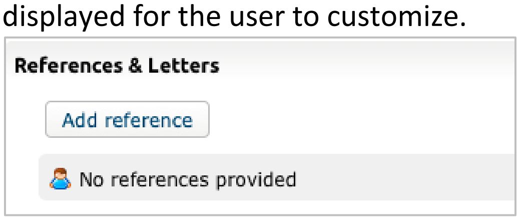
- Return to the list of applicants.
- Look in the Status column and find any applicant with the status, **Not Completed**.
- Inside the application, move to the section **Documents and References**.
- Below Curriculum Vitae, click **Upload**.
- Click **Choose File** and upload any sample PDF file on your computer.
- Click **Done** to return to the list of applicants.

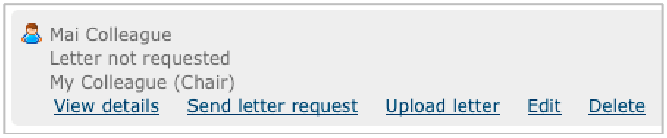
Note: The applicant's log will record this action. If this was the last requirement needed, the status of the application will automatically change to *Complete*.

3. **Documents and References**

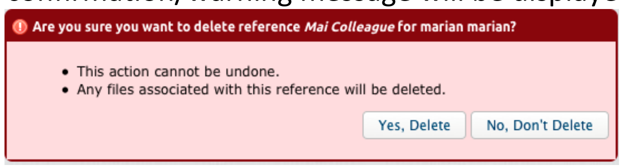
Analysts, Committee Chairs, and Editors all have the ability to manage the applications.

a. Documents – click the hyperlinked filename to download them to your computer. You can also Upload documents received outside of the system or Delete an applicant's document from their application. All these actions are logged in the system and time-stamped.
b. References – recall when your recruitment was configured, references requirements were set-up. Analysts, chairs, and editors have complete manage rights regarding references and the letters of recommendation per applicant. You may Add, Edit, or Delete a reference. You may Upload letters that arrive outside the system. You may Send a letter request to references if the requirements are "Contact Information Only" or "None".
    - To Upload a letter if the file arrives outside of AP Recruit, click Upload Letter Document
    - To Send a Request, add the reference using the Add Reference button and then click the Send Letter Request. An editable email template will be displayed for the user to customize.





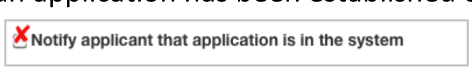
- To Delete a letter, click on Delete under the reference's name. A confirmation/warning message will be displayed.



4. **Comments and Flags**
   a. Flags – these are intended to be a unique set of labels applied to applicants to help categorize them. To flag an applicant, type a descriptor. Remember to click the button, Add Flag. Analysts, Committee Chairs, and Editors can view this information. Use the checkbox if you wish to hide the flag from reviewers. [AT UCR: The Flag field may be used to rank candidates.]
   b. Comments – Comments should be written as considerately as words spoken in face-to-face meetings. Analysts, Committee Chairs, Editors, and Committee Reviewers may always view one another's comments.

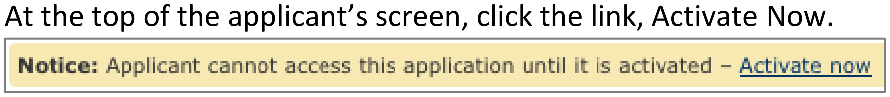
5. **Manually Add an Applicant**
Occasionally Analysts may need to create an application on behalf of someone. For example, this may be useful for high-level searches, such as those for Deans. To do this:
   a. Locate the recruitment's list of applicants.
   b. Click the button, Add Applicant located on the horizontal bar at the top of the list.

   c. Fill in the form: Applicant's contact information, degree information, current employment, etc.
   d. At the bottom of the form, check the box to send a notification to the applicant that an application has been established on their behalf.

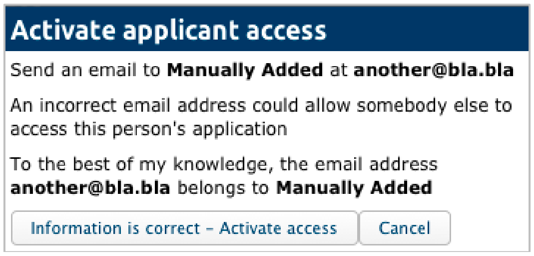


   e. Finally, click the button, Add & Manage Now.

Granting Access to the Applicant – this important action sends another email to the applicant that grants the applicant access with login and Diversity Survey instructions.
   a. At the top of the applicant's screen, click the link, Activate Now.



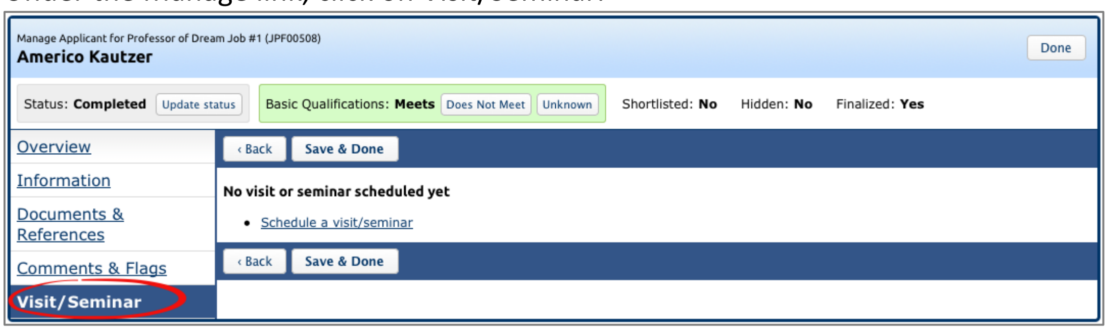
b. Look over the applicant's information and click the button, Activate applicant access.
c. Before the email is sent, verify the email address for the applicant is correct.



6. **Schedule a Visit or Seminar**

Schedule or edit applicant visits for viewing by the search committee. Add abstracts and biographies into the summaries. Optionally schedule additional events associated with the visit. To do this:

a. Under the Manage link, click on Visit/Seminar.

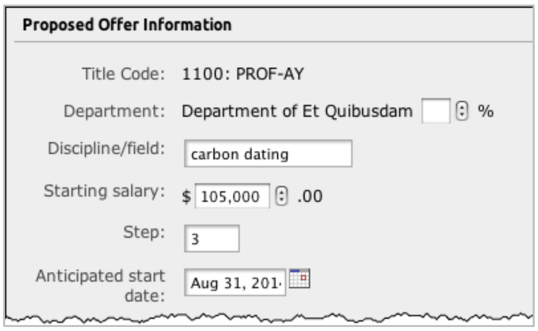


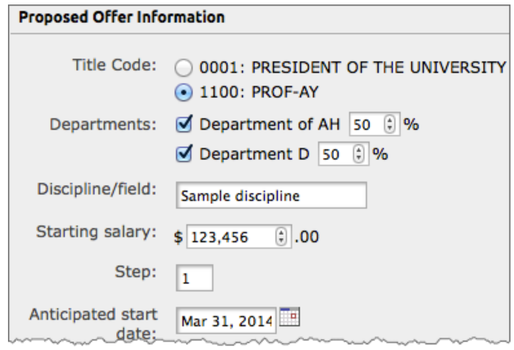
b. In the form that follows, add a title, summary, bio of the applicant, and the main event date and click Next.
c. Schedule any associated events that may occur during the visit/seminar and click Save & Done.
d. After saving, you are returned to the main Visit/Seminar screen. This is where you find links to a flyer and a formatted itinerary that you may print and distribute.

7. **Offer Proposal**

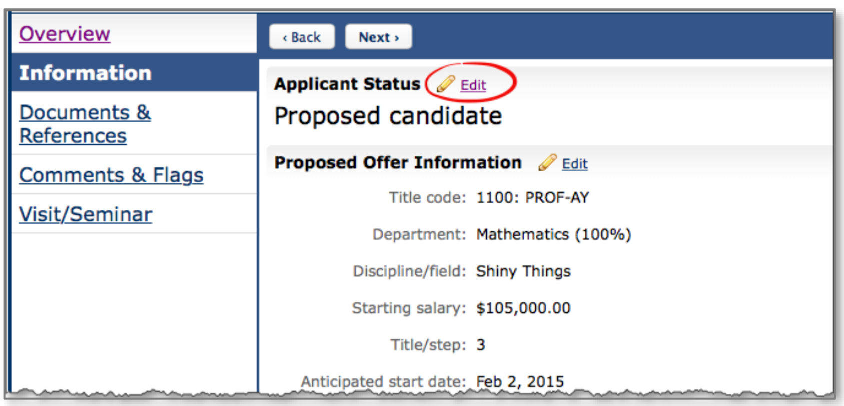
When updating to Proposed Candidate and beyond, click Enter proposed offer information.

Fill in the form and Save Changes. When multiple title codes have been assigned to the recruitment, you will be able to select the title code to associate with the applicant. If the recruitment was cross-listed between departments, you will be able to select the main department to associate with the applicant.





The offer information is editable from the applicant's information section under Manage applicant:



PART II – REPORTING

The following steps must be followed before submitting a Short List for review and approval.

REVIEW Applicant Pool Demographics → ASSIGN Disposition Reasons → UPDATE Applicant Status → REVIEW Applicant Grid → CREATE Short List

A. Applicant Pool Demographics

Mid-point in the recruitment period or mid-point of the Initial Review Date (IRD), the applicant pool must be monitored for diversity demographics.

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.

The Search Chair and Faculty Editor are responsible for monitoring applicant pool demographics. The AP Recruit Analyst or Equity Advisor will need to provide Applicant Pool reports to these users

Diversity Benchmark (Availability) Data

Specialty	Male	Female	African American	Hispanic	Asian	Native American	Minority Total*	White
Campus: Biomedical sciences	50.9%	49.1%	3.7%	4.5%	20.9%	0.4%	30.8%	69.2%
Campus: Cancer biology	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Pool Composition

Total Applicant Pool by Gender

Male	Female	Decline to State	Unknown	Total
10	8	0	0	18
55.6%	44.4%	n/a	n/a	% of respondents (18)
55.6%	44.4%	0.0%	0.0%	% of total pool

Total Applicant Pool by Race / Ethnicity

African American	Hispanic	Asian	Native American	Minority Total	White	Decline to State	Unknown	Total
0	2	7	0	9	8	1	0	18
0.0%	11.8%	41.2%	0.0%	52.9%	47.1%	n/a	n/a	% of respondents (17)
0.0%	11.1%	38.9%	0.0%	50.0%	44.4%	5.6%	0.0%	% of total pool

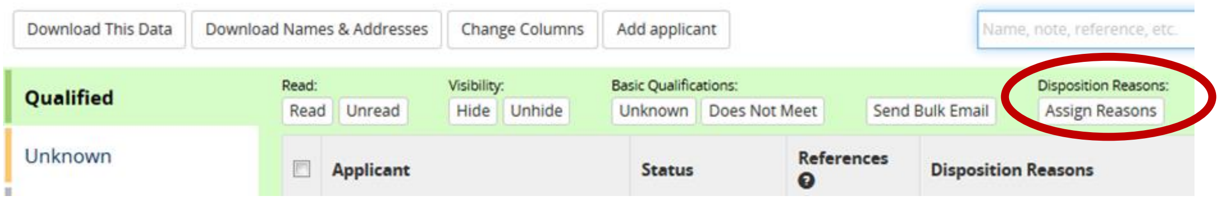
If the Applicant Pool demographics are not reasonably representative of the availability data, then contact EEAA at affirmativeaction@ucr.edu for guidance.

B. Disposition Reasons

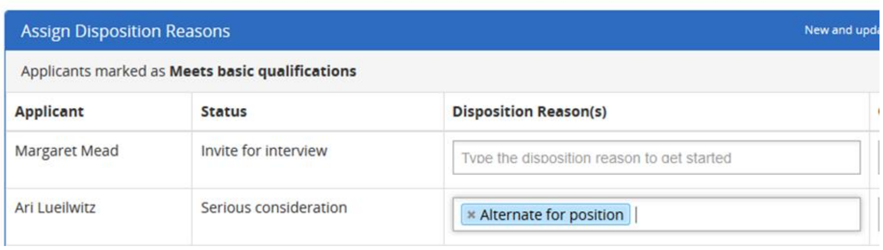
Disposition reasons are an important component of the final Search Report and reasons must be assigned to ALL applicants. **Before finalizing or submitting a Short List Report**, assign reasons why applicants did not move forward in the hiring process.

Assign Disposition Reasons to Qualified Applicants

1. Go to the Applicants tab and click the button labeled "Disposition Reasons: Assign Reasons."

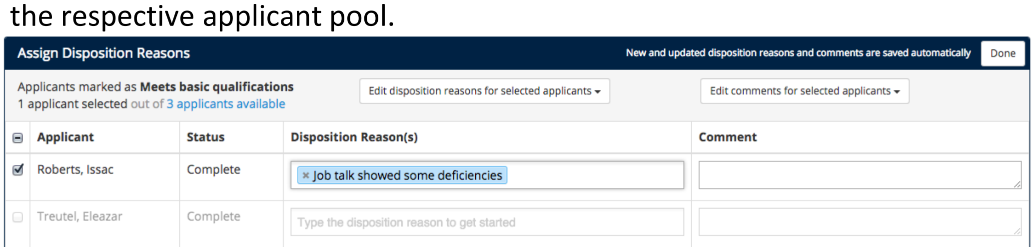


2. For each applicant, place your cursor in the box and choose from the drop-down menu of reasons. Choose the reason(s) that closely represents justification for deselection.

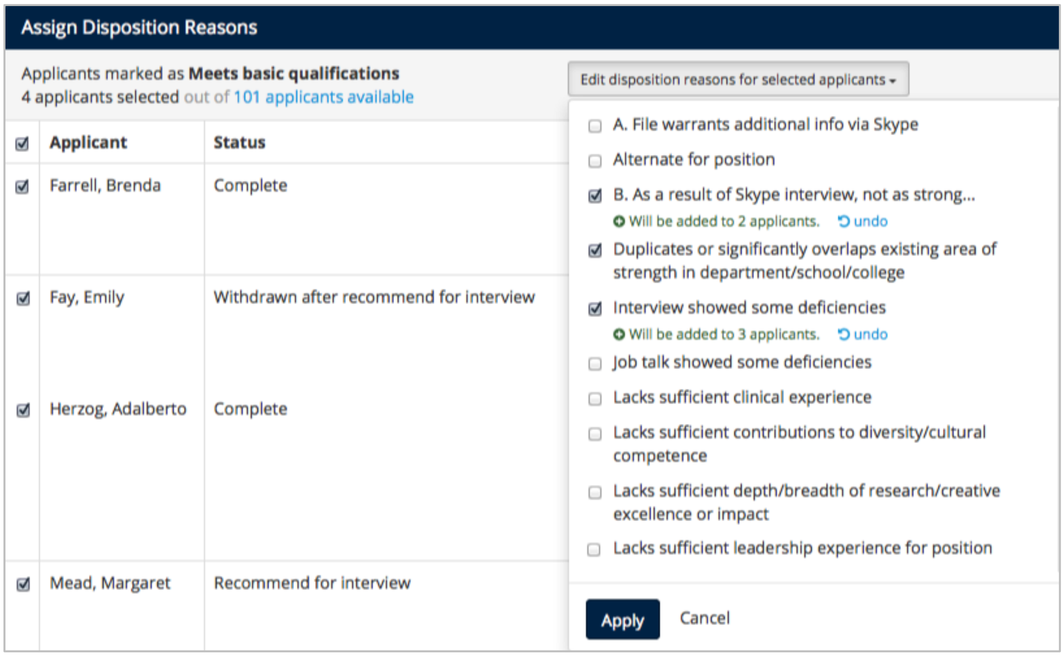


3. You can assign reasons individually or in bulk.

- To assign individually, place your cursor in the applicant's adjacent box and select a reason from a choice list. Multiple reasons are permitted. Use the comment field if needed. Reasons and comments are saved automatically. Click "Done" to return to the respective applicant pool.



- To assign in bulk, click the Edit Disposition Reasons for Selected Applicants button at the top of the assignment screen. Check the reason(s) from the selection list and click Apply. This time reasons will be applied to all applicants in your list at once. You may still edit individual applicant's reasons one-by-one.

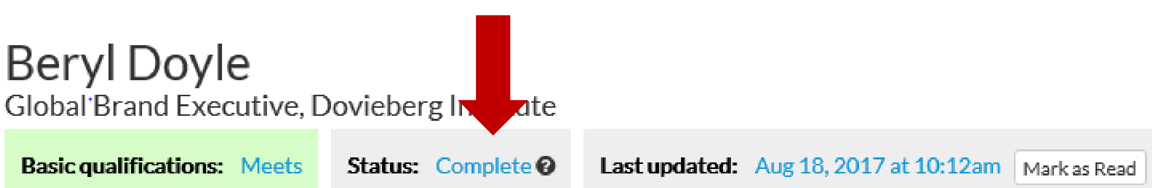


C. Applicant Status

Keeping an applicant's status up to date will make sure that the search committee is always aware of the current status and it also satisfies annual reporting requirements by the Office of the President.

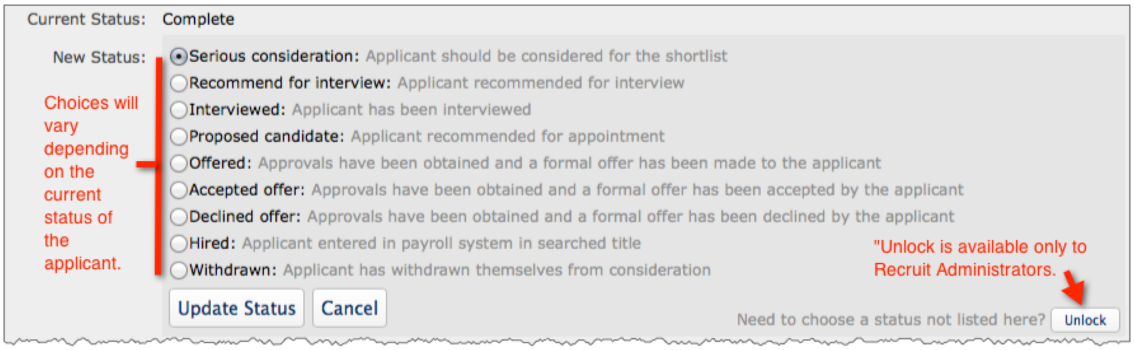
Definitions of statuses are clearly defined by rolling over the applicant's status in the status column:

1. Find the applicant in the list and click the applicant's name
2. Click the **Status** button at the top of the application



3. Recruit suggests the next logical status
4. Select a status from the list and click Update Status when done

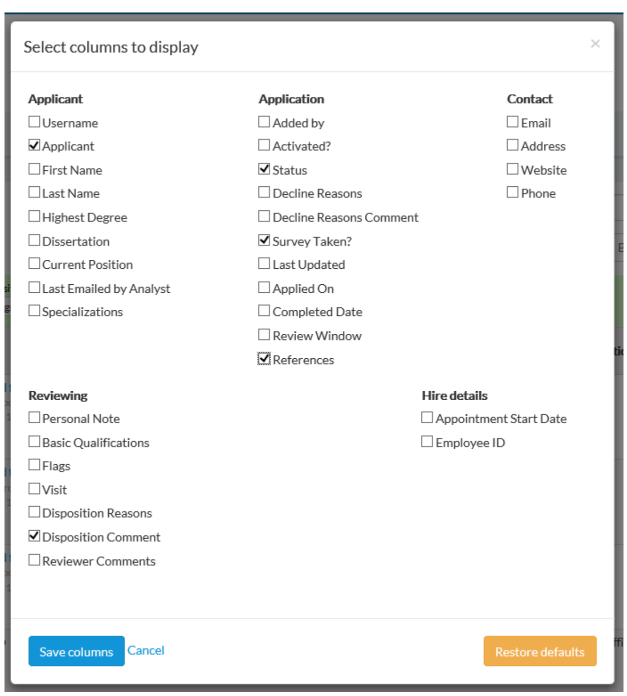
Note: You may only select statuses in a forward-moving progression. If a mistake has been made and you are unable to roll back, contact a Recruit Administrator at the Academic Personnel Office aprecruit@ucr.edu to unlock the statuses.



D. Qualified Applicant Grid

The Qualified Applicant Grid is used to ensure that EEAA compliance requirements are met before submitting a Shortlist for review and approval.

1. Select the Qualified Pool
2. Under the Applicants tab, click Change Columns to view: Applicant, Status, Survey Taken, References, Disposition Reasons then click Save Changes to view the results



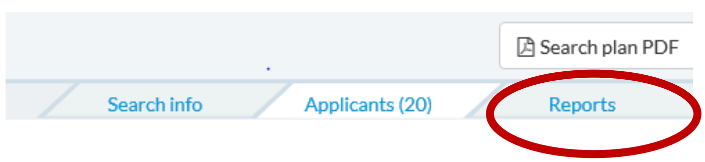
Ensure that all applicant statuses and disposition reasons have been updated before creating the Shortlist Report.

E. Short List

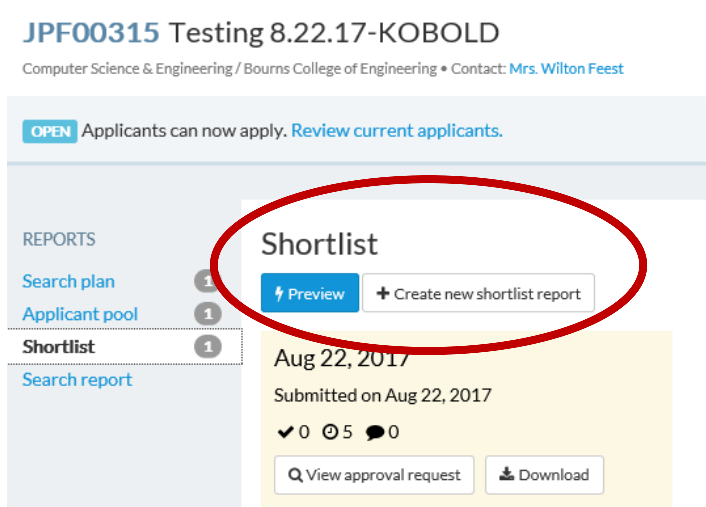
	Disposition Reason	Applicant Status
Shortlist		Recommend for Interview
Long Shortlist	Alternate for Position	Serious Consideration
Applicant Pool	Appropriate Disposition Reason	Complete

After the Applicant Grid has been reviewed, you may create the Short List and route it for approval. The approval workflow is managed via AP Recruit.

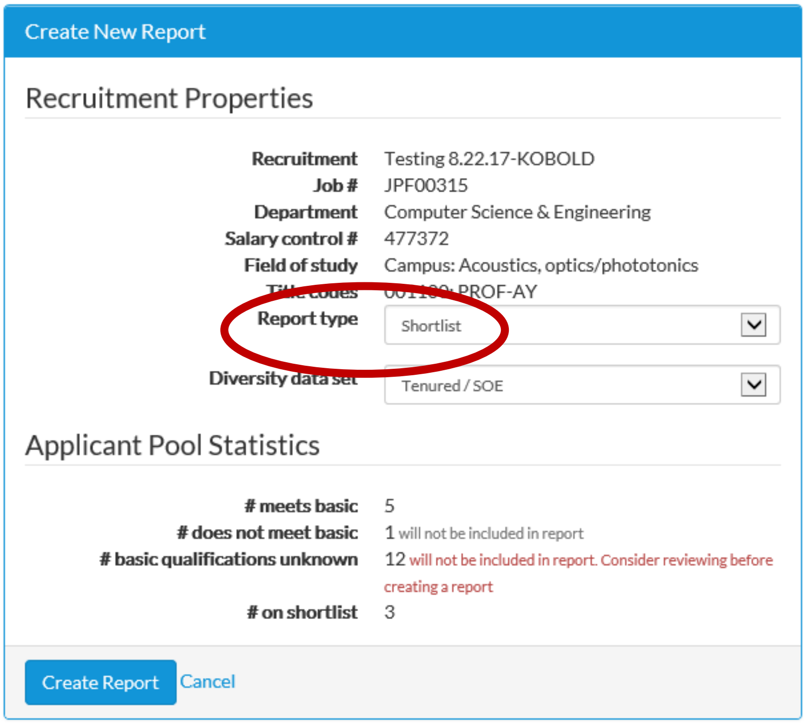
1. Click on Reports tab



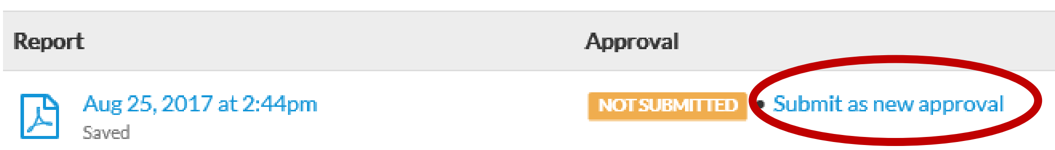
2. Select Short List, from here you can Preview or Create a New Shortlist by clicking on the buttons



3. After you click Create a New Shortlist, a new window will open, select Short List under Report Type, then click Create Report.



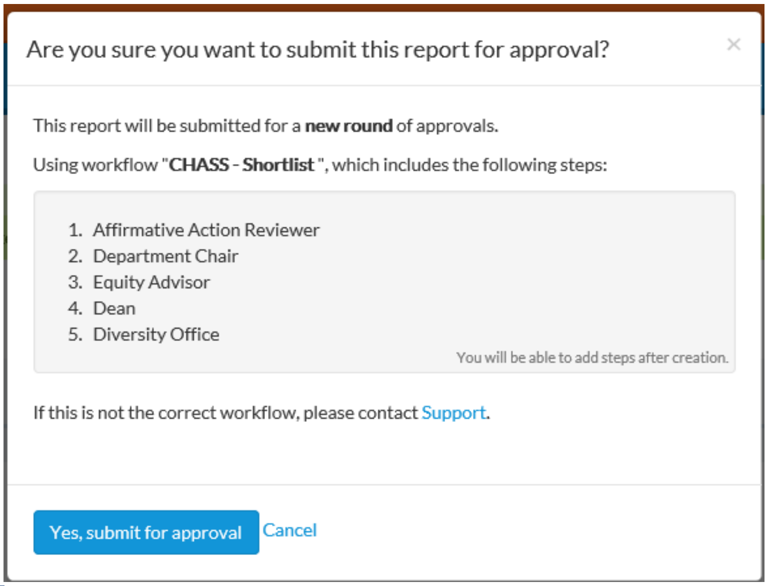
4. To submit a report, click Submit as New Approval



5. A new window with an approval workflow will be displayed. If this is not the correct workflow of if changes need to be made, contact aprecruit@ucr.edu. If it's correct, click Yes, Submit for Approval.

If this is a Cluster hire, be sure to add a step for Associate Provost, Ken Baerenklau, in the approval workflow. Associate Provost (role: Provost) approval step should be before Diversity Office.

If your first shortlist interview does not yield a successful candidate, repeat Steps 2 & 3 to receive approval for a second round of Shortlist Interviews. Note that shortlists cannot be deleted.



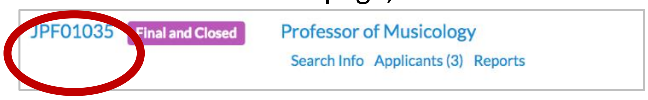
6. At each step, Recruit sends email to approvers that their approval is needed and the submitter receives a copy.
   - The email includes a direct link to the approval screen where approvers may download the report, comment, and approve.
   - When Recruit detects an approval, the next in line is notified.
   - After the last step approves, Recruit sends a notification to the submitter with next steps to take.

For more information on the how approvers use AP Recruit refer to the AP Recruit User Guide, Appendix A, "How Approvers Use Recruit" and Appendix B, "Notifications Sent to Approvers."

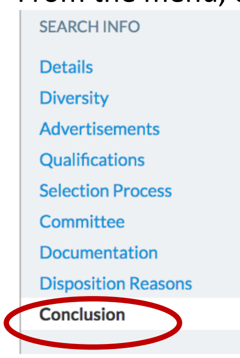
PART III – SEARCH CONCLUSION

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.

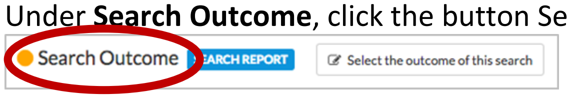
1. From the Recruitments page, find the recruitment in the list and click on it.



2. From the menu, click Conclusion.

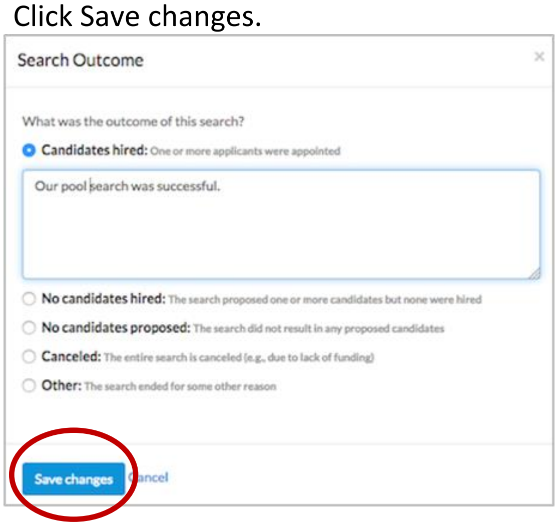


3. Under **Search Outcome**, click the button Select the Outcome of this Search.

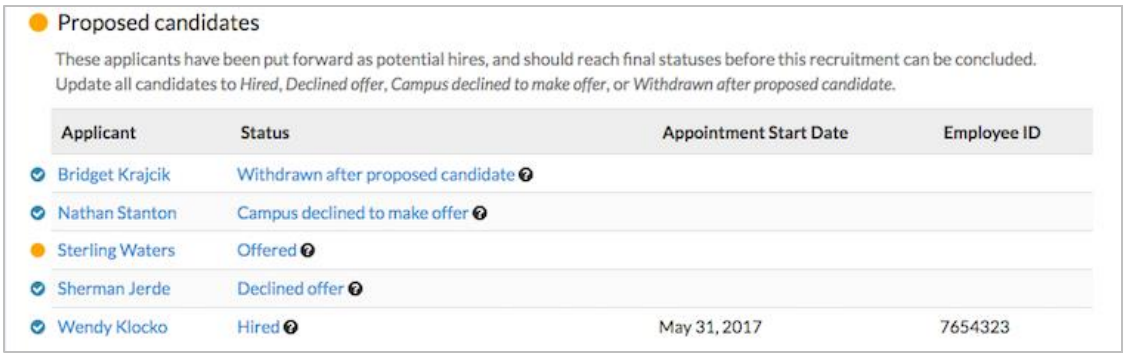


4. Make a selection from the outcome choices. "Canceled" and "Other" require an explanation. Administrative review will be required to conclude searches with outcomes marked "Other."

5. Click Save changes.



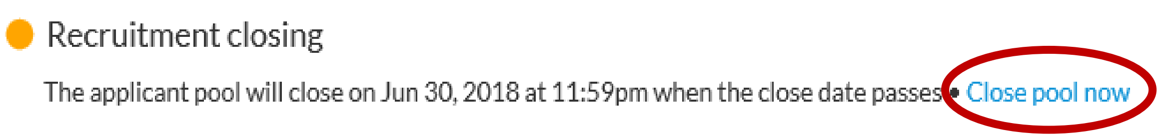
6. Under **Proposed Candidates**, the page displays any candidates that have been put forward as potential hires. This tool directs analysts to pull the candidates into their final statuses in preparation for the conclusion of the search. Use the link beside the candidate for easy status updating. Update all the candidates displayed in the panel to Hired, Declined offer, Campus declined to make offer, or Withdrawn after proposed candidate.


Proposed candidates

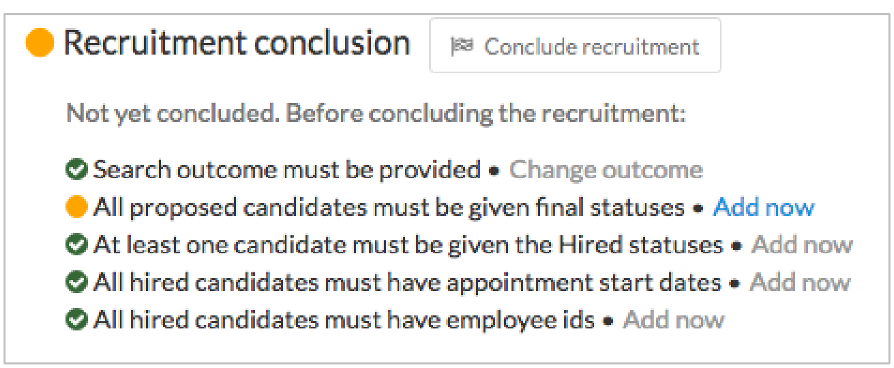
These applicants have been put forward as potential hires, and should reach final statuses before this recruitment can be concluded. Update all candidates to *Hired*, *Declined offer*, *Campus declined to make offer*, or *Withdrawn after proposed candidate*.

Applicant	Status	Appointment Start Date	Employee ID
Bridget Krajcik	Withdrawn after proposed candidate		
Nathan Stanton	Campus declined to make offer		
Sterling Waters	Offered		
Sherman Jerde	Declined offer		
Wendy Klocko	Hired	May 31, 2017	7654323

7. Under **Recruitment Closing**, use this section for recruitments advertised as “Open until filled.” Analysts can close the pool earlier than the close date. Early closure will prevent new applicants from applying while you finish up reports and approvals. When everything is done, the recruitment can be concluded.

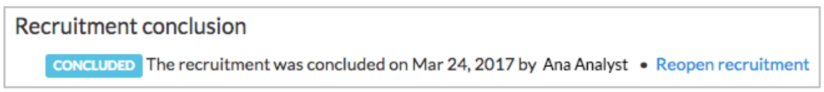


8. Under Recruitment Conclusion,
    a. A checklist indicates if any information is missing. For example, it may cue you to update a candidate to **hired** or to provide an explanation for a canceled search outcome. Follow the corresponding link(s) to reach the missing data fields.



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

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



Notes:

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

PART IV – RESOURCES

A. Websites

i. AP Recruit Production site: https://aprecruit.ucr.edu/
ii. AP Recruit Training site: https://aprecruit.ucr.edu:48918/
iii. AP Recruit Information: http://cnc.ucr.edu/aprecruit/
iv. UCI Project Site and Recruit Updates: http://sites.uci.edu/ucrecruit/about-recruit/

B. Contact Information

i. College/School/Unit: http://cnc.ucr.edu/aprecruit/contacts.html
ii. Academic Personnel Office: Antonette Toney, Sara Umali, Danessa Murdock, Kameron Johnson – aprecruit@ucr.edu
iii. Equal Employment and Affirmative Action: affirmativeaction@ucr.edu

C. UCR Recruitment Guidelines

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

D. AP Recruit User Guides

i. AP Recruit Training Page: http://cnc.ucr.edu/aprecruit/training.html

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