AP Recruit Self-Guided Tutorial

For Non-Senate Academic Recruitments

The AP Recruit system is used to track the origins of all academic appointments at UC Berkeley through searches, waivers, and exemptions. Open searches conducted in AP Recruit are required for new academic appointments in most cases. However, in rare circumstances, and on a case-by-case basis, the requirement of conducting an open search may be waived. Please refer to OFEW's Search Waivers and Exemptions page for more information.

This tutorial teaches the fundamentals of using the AP Recruit system to conduct non-senate academic recruitments. Please allow a total of three hours to complete the entire training. It is possible to do the training in multiple sessions, however we highly recommend completing it one sitting. Please read the instructions carefully and follow the lessons in order.

The non-senate academic recruitment process involves three major steps: creating the search plan, running the search, and closing out the search. Your role is to assist the individual faculty member or search committee conducting the recruitment by:

Setting up the recruitment: Creating the "Search Plan," including assistance in entering information in AP Recruit, and ensuring that the PI or search committee understand all required policies and procedures for conducting searches, as specified in the Non-Senate Search Guide;

Running the search: Support with placing advertisements and conducting outreach, initial review of candidate basic qualifications, instructing committee members as needed on how to review application materials, maintaining up-to-date AP Recruit statuses for all candidates, supporting logistics with interviews and campus visits, uploading evidence of advertisements and outreach, entering candidate disposition reasons;

Closing the search: Creating the "Search Report," providing information about the proposed candidate, confirming all candidate statuses are updated and all disposition reasons are entered;

Concluding the search: Changing final applicant statuses, entering a final search outcome, concluding the search.

Getting Started

A faculty PI, Professor X, has been given permission to recruit for a position. After communicating with Professor X regarding her hiring needs (including job duties, work schedule, qualifications, title, and hiring timeline) you've determined that this is an academic position and gathered the following information:

Department: Chemistry

Title: Assistant/Associate Specialist

Qualifications:
Basic (at the time of application): Advanced degree or enrolled in an advanced degree program
Additional (by the start date): Advanced degree; minimum of 3 years' experience working in a lab
Preferred qualifications: Degree in the biological sciences

Application materials: Applicants must provide a curriculum vitae, cover letter, and contact information for 2 references.

Job duties: Conduct experiments in the X Lab.

Percent time: Full time

Salary: $50,000–$90,000

Before the search is launched, you must create, submit, and receive approval of a search plan in AP Recruit.

Using Chrome as your browser, navigate to the AP Recruit Training site: **aprecruit.berkeley.edu:38868**

Click **UCB Faculty & Administrators** and sign in with your Calnet login if prompted.

Lesson 1: Creating the search plan

1. In the training site, click the **Recruitments** tab from the menu at the top. This is where all the recruitments that have been created in your unit(s) live and where new searches are created.

2. Click the **Create new recruitment plan** button. Name your recruitment **Assistant/Associate Specialist - Chemistry – your last name** (enter your own last name so you can identify it later) and select **Chemistry** as the home department.

In an actual search, the recruitment name would be in the following format:
Job title - area of specialization (if applicable) - department/school/college
Example: Assistant/Associate Specialist – Biochemistry – Molecular & Cell Biology

Select **Accept online applicants** to ensure the search is set up to accept applications.

Click **Create recruitment plan** to continue.

3. You are now on the recruitment Details page for your newly created search. Follow along through the guided tour of the recruitment. If it doesn't appear automatically, click the blue **Tour** button at the top right of the page. Notice that your search is in Draft mode, as indicated by the orange DRAFT icon under the search number. Familiarize yourself with the status indicators on the Details screen. Note that your plan is **Not submitted for approval** and your recruitment is **Not published**. It won't be visible to potential applicants until it is approved and published by OFEW.

The various sections of the search are categorized in the tabs on the left of the screen. We recommend filling out the required information for the search plan in each tab in order, beginning with the Details section.

4. Use the **Edit** buttons to fill out the required information in the **Details** section. Notice that the orange circles turn into green check marks when the required information is completed.

- Search tracking

  Search breadth: the information in this field intended for senate searches. For all non-senate searches please select **Don't know**

  Initial search allocation: for all non-senate searches select **Newly Allocated**

- Contact information

  Mailing address: your departmental mailing address

- Dates

  Open date: select today

  Initial review date: select the date 15 days from today – The initial review date (IRD) is the date by which applicants need to complete their application to be considered in the first round of review. IRDs must be at least 15 days from the open date. The search will continue to accept applications after the IRD up until the final date. You may add additional review dates as needed after the initial review date passes. Do not set review dates too far in the future, because they cannot be changed back to an earlier date once selected.

  Final date: select 30 days from today – This is the last date that applications will be accepted. Final dates must be at least 30 days after the open date.

5. Fill in the information on the **Position** tab.

- Position details

  Salary range: enter **A reasonable estimate for this position is $50,000–$90,000**

  Percent time: enter **Full time**

- Title information

  Title codes: search for and select **003310: ASSOC SPECIALIST** and **003320: ASST SPECIALIST** – These alphanumeric codes denote the specific position classification. Candidates can only be hired into the codes used in the approved search plan so be sure to include all relevant title codes for your searches.

6. Fill in the information on the **Description** tab.

- Position description
  Click the **Add** button and enter the job duties provided by the PI into the position description: **Conduct experiments in the X Lab.**

7. Fill in the information on the **Requirements** tab.

- References
  Use the information provided by the PI to set up the reference requirements

  Reference type: select **Contact information only**
  Reference process explanation: write **letters of reference will only be solicited for finalists**
  Required references: 2
  Optional references: 0
  Reference visibility: All reviewers

- Documents
  When setting up the document requirements, notice that a recommended set of documents has been provided. You can delete any of the default options and add any additional documents that aren't listed, if needed. Edit the list to match the requirements the PI needs.

Click **Start with recommend settings**. Delete all the requirements except Curriculum Vitae and Cover Letter. Click the **Edit** button under Cover Letter and change it to **Required**.

8. Fill out each of the sections on the **Qualifications** tab using the information gathered from the PI.

- Basic qualifications
  Advanced degree or enrolled in an advanced degree program

- Additional qualifications
  Advanced degree and a minimum of 3 years' experience working in a lab

- Preferred qualifications
  Degree in the biological sciences

9. Use the **Edit** button to fill out the required information on the **Demographics** tab.

- Availability demographics
  Select the most closely related field(s) of study to generate a data set of availability data. This availability data is the national pool of PhD recipients in each field. Your applicant pool should have a similar demographic makeup. For this search select **Chemistry, general**.

10. Complete the following sections on the **Advertisements** tab.

- Planned search & recruitment efforts
  Write the search & recruitment efforts (including outreach, ad locations, etc.) in this section. For this search, write **Professor X will send targeted emails to faculty members at peer institutions advertising this position.**

- Ad documents
  If you intend to distribute a short ad, it must be uploaded to the ad documents section as a PDF. For this search assume there is no short ad and leave this section blank.

- Applicant search sources
  This section allows you to customize the options for asking applicants how they heard about the search. Click **Start with default sources** to add all the locations that AP Recruit automatically posts the job to. You can also add additional locations specific to the planned search and recruitment efforts for this search if desired.

11. The **Selection process** section is optional.

12. Fill out the **Committee** section. For this recruitment there is not an entire search committee so the PI will be conducting the search. The best role for Professor X would be a Core Reviewer. This allows her to view and add disposition comments for only completed applications.

- Core committee
  For this exercise add yourself as a Reviewer

13. The **Documentation**, **Disposition reasons**, and **Conclusion** sections are not needed for the search plan. Leave these as is.

You have now filled out all required sections of the search plan. This is indicated by the green circle with the check mark at the top of the recruitment next to the **DRAFT** icon.

14. Click **submit it for approval** at the top of the screen. Then click **Yes, submit for approval**.

You are now on the Search plan approvals page. Familiarize yourself with this page. You can specify approvers, notify approvers, and add comments for approvers from here. In a real search you would need to specify the PI as the Committee Chair so she could review and approve the search plan in AP Recruit. The other approval roles would typically auto populate with the correct approvers. Automatic email requests are sent to each approver who is next in line in the workflow. The emails include a direct link to the approval screen where they may download the plan, comment, and approve.

For this exercise, don't bother to specify any approvers.

15. Click **Done**.

Click on the **Search plan** tab for the search (under the Approvals header on the left menu). This is where you find the search plan you've submitted for approval.

16. Click the **Search info** tab at the top right to return to the details section. Notice that the orange icon at the top of the screen now indicates that the recruitment is pending approval. You can quickly check the status of the search plan approval by clicking **View approval request** at the top of the screen.

The Office for Faculty Equity & Welfare is the final approver for search plans and reports. Once OFEW approves, the recruit analyst is responsible for publishing the recruitment.

Published recruitments are available for applicants to apply. For an actual recruitment, the hiring unit would conduct all outreach and post the advertisement in online ad locations as soon as it is published.

Please remember that OFEW automatically places the advertisement on AP Recruit, the Chronicle of Higher Education, HERC, HigherEd Jobs, and America's Job Exchange associate sites. All additional locations are up to the hiring unit to coordinate and place. Job Elephant services are available at no cost to help with advertising.

Assume the search plan was approved and that you've published the recruitment. In the next lesson you will learn how to use the system to evaluate applications.

Lesson 2: Working with the applicant list

For this lesson you will work with a fake recruitment that has been set up for you in the training site to evaluate fake applicants. The AP Recruit system should be used to review applicant's submitted materials, update candidates' statuses, and mark their selection and deselection reasons.

1. Navigate to the search that was set up for you by OFEW. Your name and **LESSON 2** should be included in the recruitment title. Do *not* use the search you were working with in the previous lesson.

On the details page, notice that that the top status indicator shows that the search is **OPEN**. There is also now an Applicants tab at the top right.

2. Click the **Applicants** tab to view the applications for the search.

In an actual search, once the initial review date passes you should first mark all the complete, submitted applications as meets or does not meet basic qualifications. The submitted, qualified applicants make up your Applicant pool. For this exercise, many of the candidates have already been marked for the basic qualifications.

3. Review the workspace ribbon at the top of the applicant list. Click the section that says **Basic qualifications** and select **Unknown**. Suppose you determined that Winston Burke did not meet the basic qualifications because he did not have the correct degree. Check the box to the left of his name and click the Basic qualifications button in the section titled "Mark selected as" at the top of the list. Select **Does Not Meet**.

Notice that Winston Burke no longer appears on the screen. Since you indicated that he does not meet the basic qualifications, he is no longer in the group of applicants with basic qualifications unknown. Mark the remaining unknown applicants as **Does Not Meet**.

5. Now that all applicants have been reviewed for the basic qualifications, assume that the PI has reviewed the complete qualified applicants and would like to interview one. Use the workspace ribbon to view the **Qualified** applicants.

6. Review an application by clicking on the applicant name. Click **Margaret Mead**. From her application page you can find her about information, selected specializations, uploaded documents, and letters of recommendation. You can also add a comment to her application and update her status from this page. Click **Return to list of applicants** at the top right.

7. Now turn your attention to the Status column. Notice Margaret Mead is listed at Recommend for interview. Suppose the PI interviewed her. Click her status to update it. Select **Interviewed** then click **Update status**.

8. Suppose another applicant has emailed you to let you know they would no longer like to remain in consideration. Click another applicant's status and update it to **Withdrawn**. Note that marking a candidate as Withdrawn automatically moves them to the unqualified section of applicant list.

9. Once the PI has conducted the interview, suppose she would like to select Margaret Mead for the position. Update her status to **Proposed candidate**.

Note that no applicants should have statuses beyond Proposed candidate prior to the approval of the search report.

10. The PI has provided you with the reason they selected the proposed candidate as well as reasons why all the other applicants were not selected. It is now time to assign disposition reasons to all the complete applicants. Begin with the list of qualified applicants.

- Check the box at the top left of the applicant list (this selects all the qualified applicants) then click **Assign disposition reasons**.

- Use the disposition reasons column to select the appropriate disposition reason for each deselected applicant. For this exercise choose any of the options listed. Since Margaret Mead is the proposed candidate, do not select a disposition reason for her. Instead provide a few sentences in the comment column explaining why she was chosen. For this exercise, make up a few comments and type them out in her comment section.

Please note that in an actual recruitment all the disposition reasons must be relevant to the description of the position and stated qualifications.

- Click **Done** at the bottom of the screen once everyone has been assigned a disposition reason.

11. Switch your view to the unqualified applicants and provide disposition reasons for all of them. Use the drop down menu and/or comment section to indicate which basic qualification they failed to meet. For this exercise choose any of the options from the Disposition reason menu. For withdrawn candidates select **Candidate withdrew**.

Now that all applicants have been assigned disposition reasons, you are ready to begin creating the search report.

Lesson 3: Creating the search report

Non-senate search reports require:

- Verifying that all applicant statuses are up-to-date
- Confirming all candidates have disposition information entered
- Entering proposed appointment information
- Entering actual search and recruitment efforts
- Uploading documentation (search committee narrative/interview notes)

In Lesson 2, you updated candidate statuses and entered disposition information for all the applicants so most of the work for the search report is already complete.

1. Click the **Reports** tab within the recruitment you worked with in Lesson 2. Click the **Search report** tab in the menu on the left.

This page is used to create a new search report, view previously approved search reports, and check the status of a search report approval.

2. Click **Create new search report**. If required sections have not been filled out, the system will prompt you to complete them now. Since you have not yet filled out the actual search and recruitment efforts, you must add them now. Click **Add now**.

3. Enter the Actual search & recruitment efforts. For this search type "**Professor X sent targeted emails to faculty members at peer institutions advertising this position.**" Click **Save changes** then return to the search report section.

4. Click Create new search report and title it **Margaret Mead** then click **Create search report**. Note: all search report titles should include the name(s) of the proposed candidate(s) being put forward.

Search reports live update until they have been approved by OFEW. This means that changes made to candidate statuses, disposition reasons, and other parts of the search will be reflected in the report.

5. Return to the list of applicants and find the proposed candidate Margaret Mead. Click on her status to add the proposed offer information. This needs to be included for all proposed candidates before submitting the search report for approval. Click **Add offer information**. Type in 100% for percent time and select an anticipated start date in the future. Click **Update status** once finished.

6. Navigate to the **Search info** tab and select **Documentation** from the menu on the left. Interview notes for all searches must be uploaded to the Interview materials section prior to submission of the search report. For this exercise, upload any pdf from your computer.

7. Go back to the search report section and click on the name of your search report. A pdf version of the report will download. Open it up in your browser. Scroll through the search report pdf and familiarize yourself with the different sections. Notice that the report includes the proposed appointment information for Margaret Mead that you entered earlier, the candidate disposition reasons, and the interview materials you uploaded.

8. Return to the Search report tab and click **Submit now** to submit your search report for approval. In an actual search you may need to specify the appropriate approvers. Click **Done** to return to the previous page.

At this stage, only a verbal or informal soft offer should be made to the candidate. All candidates must have an approved search report prior to a formal offer and hiring.

Lesson 4: Concluding the search

Suppose the search report was approved and the proposed candidate accepted the offer. It is important to remember to update the candidate's status in AP Recruit and conclude the recruitment once they are hired.

Concluding the recruitment involves updating applicant statuses and indicating the search outcome. Once concluded, the entire search and applicant files become hidden from all reviewers. It can always be reopened in the future if needed.

1. Return to the applicant list and locate Margaret Mead. Click her status to update it and select **Offered**. Enter the offer information (for this search assume it is the same as the proposed offer info from the search report) and click **Update status**.

2. Click her status again and select **Accepted offer**; click **Update status**.

3. Click her status again and select **Hired**. Enter today's date as the Appointment start date and enter a few random numbers for the employee ID. Click **Update status**. Please note in an actual search it is important to include the real employee ID and start date for all hired candidates. This information is critical for linking candidates from searches in the AP Recruit system to their records in the appointment system.

4. Click the Search info tab and select the **Conclusion** section from the menu on the left. Click **Select the outcome of this search** and choose **Candidates hired.**

5. Click **Conclude recruitment** at the bottom of the Conclusion page.

Congratulations! You've successfully completed the AP Recruit tutorial. Please email ofew@berkeley.edu to gain access to the live AP Recruit site.