

DIVISIONAL APPROVER USER GUIDE

University of California Santa Cruz Recruitment Management System

The Divisional Approver User Guide in PDF format may be viewed and printed.

If you wish to use it as an on line resource you may navigate by:


- **opening the bookmarks tab by clicking on the bookmark icon  located in the upper left of the page and then clicking on the bookmark for the subject you wish to view**
- **clicking in the table of contents on the entry you wish to view**

TABLE OF CONTENTS

.....

INTRODUCTION.....	2
BEFORE YOU GET STARTED	3
Your Web Browser	3
Web Browsers Versions	3
Additional Software	3
Navigational Dos and Don'ts	3
Data Security.....	3
Help Options.....	3
ACCESSING RMS	4
APPROVING A RECRUITMENT REQUEST.....	5
Search All Requests	5
View Pending Requests	6
Viewing a Request	6
Reviewing Requests.....	7
Viewing and Editing the Funding Information Tab	8
Adding a new Entry to the Funding Information Tab.....	9
Attaching Supplemental Documents PC	10
Attaching Supplemental Documents PC –Locating and Attaching	12
Attaching Supplemental Documents PC – Viewing or Removing.....	13
Attaching Supplemental Documents Mac	14
Attaching Supplemental Documents Mac–Locating and Attaching	15
Attaching Supplemental Documents Mac – Viewing or Removing.....	16
Comments	17
History Tab	18
Approving the Request.....	19
APPROVING A JOB OFFER	20
Searching for a Job Offer Request.....	20
Viewing a Job Offer Request Requiring Approval.....	20
Reviewing and Approving a Job Offer Request	21
Reviewing and Approving a Job Offer Request Continued.....	22
Viewing a Completed Job Offer	23
NON RECRUITMENT/WAIVER OF RECRUITMENT (NR/W) OVERVIEW.....	24
Reviewing a Request	24
Recruitment Posted Email Notification.....	25
EMAIL NOTIFICATIONS.....	26
Email Recipient List.....	27
ADMINISTRATIVE FUNCTIONS	28
Changing Your Password.....	28
Logging Out.....	29

INTRODUCTION

Welcome to The UCSC Recruitment Management System (RMS) user guide. This guide is intended to assist Divisional Approvers (DA) in navigating the system used to initiate recruitments and job offers for staff positions.

Profile

Each RMS account/password is associated with a User Type, which defines the user's role and permissions within the system.

Divisional Approver (DA)

Approve all recruitments for:

Financial Approval

Organizational/Strategic Approval

Approve job offer exceptions, when necessary:

Offers at above the minimum salary

Change in % of time

Additional job offers not previously approved

Moving expenses, etc

Successful completion of [RMS training](#) is **required**.

Each Division should have at least one primary DA and one back-up DA.

DA duties are assigned by the appropriate Principal Officer or their designate.

BEFORE YOU GET STARTED

.....

Your Web Browser

Mozilla Firefox version 2.0+ is the recommended web browser for use with the Recruitment Management System (RMS) for both PC and Mac. You can download Mozilla Firefox with the assistance of your IT desktop support person.

PC

For PCs, Firefox is recommended over Internet Explorer (IE) because the performance of IE is unstable for use with RMS.

Mac

You are welcome to use Safari if you choose, however versions 1.3+ or 2.0+ are recommended. We don't recommend other versions as they may be unstable. We **do not** recommend Internet Explorer (IE) because IE does not support Mac and you will experience problems reliably accessing and using RMS.

Web Browsers Versions

- [Mozilla Firefox 2.0.+ Recommended](#)
- [Internet Explorer 6.0+](#)
- [Safari 1.3+ or 2.0+](#)

To have a browser installed please see **Desktop Computer Support** at http://its.ucsc.edu/service_catalog/standard_desktop_support/ or the **ITS Support Center** at http://its.ucsc.edu/services/help_desk/

Additional Software

RMS requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

Navigational Dos and Don'ts

When logging in to RMS always open a new browser window. *Do not* use a browser window that you have been using to navigate the web.

Once logged in to RMS do not use your browser's "Back", "Forward" or "Refresh" buttons to navigate the system, and do not open a new browser window from your existing window. This may cause unexpected results, including loss of data or being logged out of the system. Please use the navigational buttons within RMS.

Always **logout of RMS** and then **X** (close) out of the browser when you have completed your work.

Data Security

RMS contains electronic restricted data. To ensure the security of this and other sensitive data, **the system will automatically log you out after 60 minutes when no activity is detected.** Anytime you leave your computer, even briefly, we strongly recommend that you save any work in progress and logout of RMS by clicking on the "Logout" link located under "Admin" at the bottom of the left navigation bar.

Help Options

For technical assistance using RMS contact the System Administrator at rms-help@ucsc.edu or call 831-459-5444.

Your [Human Resources Service Team Representative](#) (HRSTR) can provide advice and consultation on the policies and procedures related to staff recruitment and hiring.

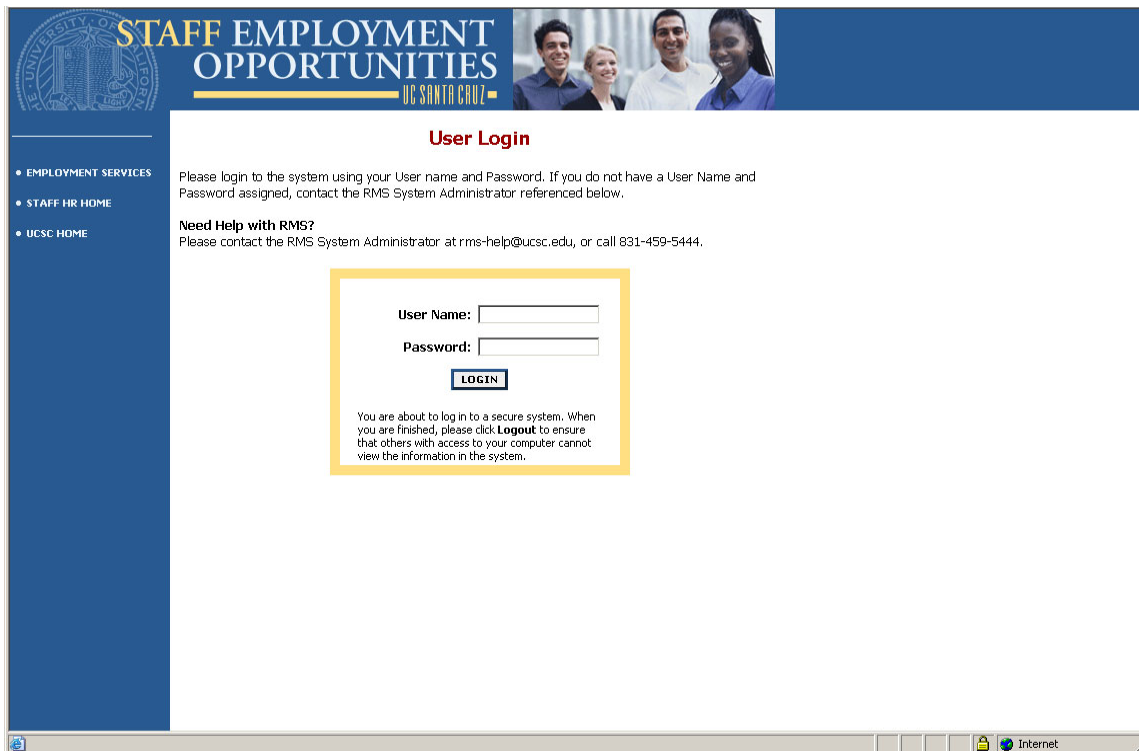
ACCESSING RMS

.....

Your user name and password will be provided to you after you have completed the required classroom training. Forgot your password? Contact the RMS Administrator at rms-help@ucsc.edu or 459-5444 to have your password reset.

Note: Always login to RMS using a *new browser window*, never from a browser tab or window previously in use.

Enter jobs.ucsc.edu/hr in the address box at the top of your web browser. The RMS user login screen will appear and will look similar to the screen below.



Note: It is recommended that you bookmark the login page above for quick access. However, to ensure the security of the sensitive data in RMS never set your computer to “remember” your RMS login & password.

Login to the system with your user name and password.

APPROVING A RECRUITMENT REQUEST

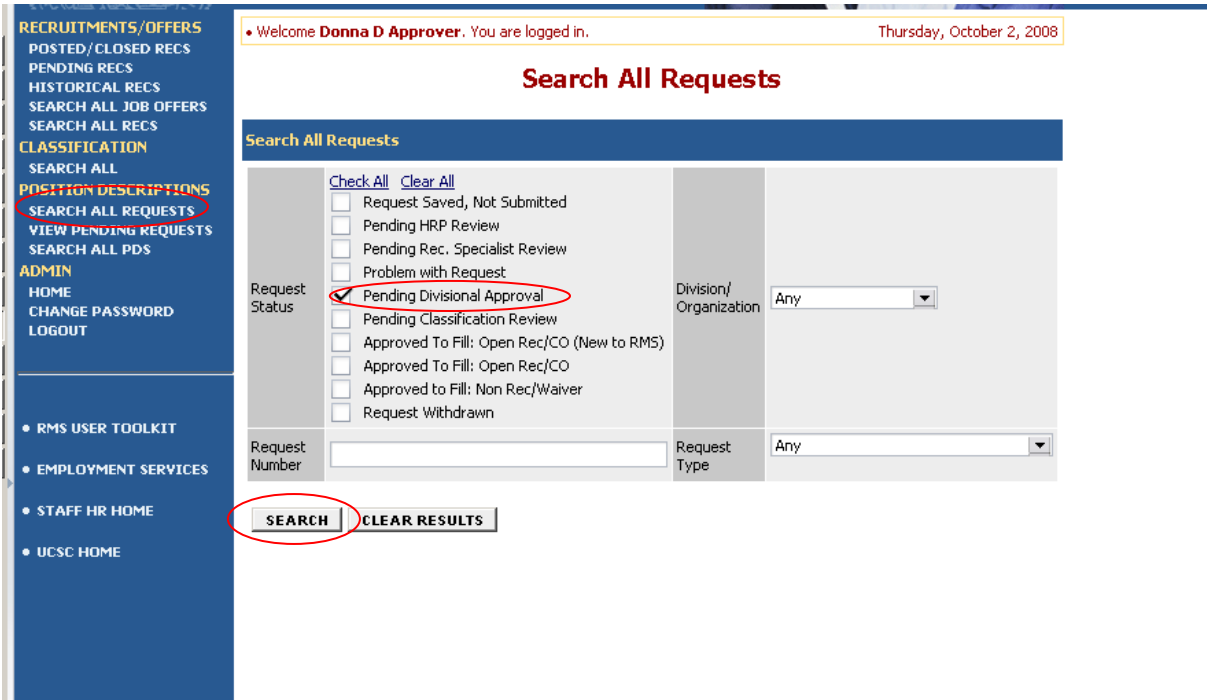
Search All Requests

You will receive a system-generated email when a recruitment request requires your approval.

To review and approve a recruitment request:

- Login to the system
- Under Position Descriptions in the left navigation bar, click “Search All Requests”
- Check the Request Status box “Pending Divisional Approval”
- Click “Search” (this step will limit your search results so you see only the requests at a status of *Pending Divisional Approval*).

Note: You may also check any combination of Request Status boxes to search for a request (this search feature is useful when you have approved a request and would like to see where it is in the workflow). You may view a request at any status, but you can only take action on a request when it is at a status of “Pending Divisional Approval”.



View Pending Requests

When you have been selected as the Divisional Approver you have view-only rights to a request at any status. To view requests: under Position Descriptions in the left navigation bar, click “View Pending Requests”. You will see a screen similar to the one below.

Each column can be sorted by clicking the arrow at the top of the column. The column with the brighter blue arrow indicates the displayed data is being sorted by that column.

Note: In the screen below, one request is at a status of “Pending Classification Review”. Requests at this status have already been approved by a Divisional Approver.

RECRUITMENTS/OFFERS
POSTED/CLOSED RECS
PENDING RECS
HISTORICAL RECS
SEARCH ALL JOB OFFERS
SEARCH ALL RECS

CLASSIFICATION
SEARCH ALL

POSITION DESCRIPTIONS
SEARCH ALL REQUESTS
VIEW PENDING REQUESTS
SEARCH ALL PDS

ADMIN
HOME
CHANGE PASSWORD
LOGOUT

• RMS USER TOOLKIT

• EMPLOYMENT SERVICES

Welcome **Donna D Approver**. You are logged in. Thursday, October 2, 2008

View Requests

View All Requests

2 Records

Request Status	Request Type	Request Number	Proposed Classification	CHM	First Submitted to HR
Pending Divisional Approval View	Non-Recruitment	0801897	____ ASSISTANT III [4722] View Summary		10-02-2008
Pending Divisional Approval View	Establish New Position to Fill	0801896	____ ASSISTANT II [4723] View Summary	C H Manager, Cathy	09-30-2008

Viewing a Request

To view the request details, click the “View” link located under the Request Status.

RECRUITMENTS/OFFERS
POSTED/CLOSED RECS
PENDING RECS
HISTORICAL RECS
SEARCH ALL JOB OFFERS
SEARCH ALL RECS

CLASSIFICATION
SEARCH ALL

POSITION DESCRIPTIONS
SEARCH ALL REQUESTS
VIEW PENDING REQUESTS
SEARCH ALL PDS

ADMIN
HOME
CHANGE PASSWORD
LOGOUT

• RMS USER TOOLKIT

• EMPLOYMENT SERVICES

Welcome **Donna D Approver**. You are logged in. Thursday, October 2, 2008

View Requests

View All Requests

2 Records

Request Status	Request Type	Request Number	Proposed Classification	CHM	First Submitted to HR
Pending Divisional Approval View	Non-Recruitment	0801897	____ ASSISTANT III [4722] View Summary		10-02-2008
Pending Divisional Approval View	Establish New Position to Fill	0801896	____ ASSISTANT II [4723] View Summary	C H Manager, Cathy	09-30-2008

Reviewing Requests

After clicking “View” you will see a screen similar to the one below displaying the first of several tabs.

You have view-only rights to the following tabs: “Job Description/Position Information”, “Job Duties”, and “Requisition Information”.

You have edit rights to the following tabs: “Funding Information”, “Supplemental Documents”, and “Comments”.

The “History” tab documents the time, date, and RMS User associated with each stage of activity as the request progresses through the workflow.

Click the “Continue To Next Page” button to navigate through the tabs.

RECRUITMENTS/OFFERS
VIEW OPEN RECS
SEARCH ALL JOB OFFERS
SEARCH ALL RECS
CLASSIFICATION
SEARCH ALL
POSITION DESCRIPTIONS
SEARCH ALL REQUESTS
VIEW PENDING REQUESTS
SEARCH ALL PDS
ADMIN
HOME
CHANGE PASSWORD
LOGOUT

• EMPLOYMENT SERVICES
• STAFF HR HOME
• UCSC HOME

Welcome DA DA 2. You are logged in. Monday, May 7, 2007

View/Edit Establish New Position to Fill - 0700943

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
----------------------------------------	------------	-------------------------	---------------------	------------------------	----------	-----------------

CONTINUE TO NEXT PAGE >>

*Required information is denoted with an asterisk.

Miscellaneous PD Information	
Request Number	0700943
Request Type	Establish New Position to Fill
Position Description (PD) Number	
Copied from PD number:	
Division/Organization	Div Org 4
Department/Unit	ARTS : Arts Admin [4081-317-33]
Sub-Department/Sub-Unit	
Responsible Certified Hiring Manager	
Enter name of Hiring Manager here (Type "N/A" if Certified Hiring Manager is selected above).	Joe Smith
Hiring Manager Phone xxxx-xxxx-xxxx	
Hiring Manager Email	
Responsible Divisional Approvers	DA 2, DA
Responsible HR Partner	HRP 3, HRP
HR Partner Phone	

Internet

Note for Non-Recruitment and Waivers of Recruitment: The salary you approve in the Non-Recruitment or Waiver of Recruitment Request Types may be above the minimum salary range and is specific to the candidate(s) selected for hire into the position.

Note for Open/Campus Only Recruitment: The salary you approve in the Open/Campus Only Request Types is a minimum salary, a salary range, or a salary commensurate with qualifications and experience which your department intends to post publically. Later in the process, when a Job Offer Request is initiated, if the candidate selected for hire is offered a salary above the minimum, you will be required to approve that salary when you approve the Job Offer Request.

Viewing and Editing the Funding Information Tab

This tab allows you to view, edit, delete, and add new funding information.

If no changes are required you may click the “Continue To Next Page” button and move on.

To edit the funding information, click the “Edit” link associated with the funding line you intend to edit.

The screenshot shows the 'Funding Information' tab with a table of existing entries. The table has columns for Location Code, Org. Code, Fund, Project Code, Cost Center, Sub, FTE, Distribution Percent, Distribution Begin, and End Date. Two records are listed:

Location Code	Org. Code	Fund	Project Code	Cost Center	Sub	FTE	Distribution Percent	Distribution Begin	End Date
7	403024 SOCSCI/ EC/ INTERN [1851- 114-11]	20567		SHRE	Sub 2		.5000		06/30/ 2009
7	402660 SocSci/ ED/CCWP Nat'l Writing Project [1892- 114-11]	20345		SHRE	Sub 2		.5000		06/30/ 2009

Below the table are buttons: 'ADD NEW ENTRY', '<< RETURN TO PREVIOUS', 'SAVE AND STAY ON THIS PAGE', and 'CONTINUE TO NEXT PAGE >>'. The 'CONTINUE TO NEXT PAGE >>' button is circled in red. A 'VIEW REQUEST SUMMARY >>' button is also visible at the bottom.

A screen similar to the one below will open giving you access to make appropriate additions or edits to the funding information.

Note: RMS will display a red asterisk (*) to the right of all required fields. You must add data to these fields in order to save your work and/or continue to other tabs.

When you have finished making changes, click the “Save Changes” button. The “Cancel” button will close this screen and cancel any changes made.

The screenshot shows the 'Edit Entry' form. It contains the following fields:

- Location Code: 7
- Org. Code: 402660 SocSci/ED/CCWP Nat'l Writing Project [1892-114-11]
- Fund: 20345
- Project Code: (Empty)
- Cost Center: SHRE
- Sub: Sub 2
- FTE: (Empty)
- Distribution Percent: .5000
- Distribution Begin: (Empty)
- End Date: (Empty)

Buttons at the bottom are 'SAVE CHANGES' and 'CANCEL', both circled in red. A red asterisk is visible next to the 'Location Code' field.

Adding a new Entry to the Funding Information Tab

A “Funding Information” tab with no information looks similar to the screen below. To add funding information, click the “Add New Entry” button.

The screenshot shows the 'View/Edit Non-Recruitment - 0801897' interface. On the left is a navigation menu with options like 'POSTED/CLOSED RECS', 'PENDING RECS', 'HISTORICAL RECS', 'SEARCH ALL JOB OFFERS', 'SEARCH ALL RECS', 'CLASSIFICATION', 'POSITION DESCRIPTIONS', 'SEARCH ALL REQUESTS', 'VIEW PENDING REQUESTS', 'SEARCH ALL PDS', 'ADMIN', 'HOME', 'CHANGE PASSWORD', 'LOGOUT', 'RMS USER TOOLKIT', 'EMPLOYMENT SERVICES', 'STAFF HR HOME', and 'UCSC HOME'. The main content area has tabs for 'Job Description / Position Information', 'Job Duties', 'Requisition Information', 'Funding Information', 'Supplemental Documents', 'Comments', and 'Request History'. Below the tabs is a table of 'Existing Entries' with one record:

Location Code	Org. Code	Fund	Project Code	Cost Center	Sub	FTE	Distribution Percent	Distribution Begin	End Date
7	403017 SOCSCI/ AN/GRAD DEV [1813- 114-11]	20567		SHRE	Sub 2		1.0000		04/30/ 2009

Below the table are navigation buttons: '<< RETURN TO PREVIOUS', 'ADD NEW ENTRY' (circled in red), 'CONTINUE TO NEXT PAGE >>', 'SAVE AND STAY ON THIS PAGE', 'CANCEL', and 'VIEW REQUEST SUMMARY >>'.

After clicking the “Add New Entry” button, you will see a screen similar to the one below.

The screenshot shows the 'Add New Entry' form. A red circle highlights the text: '* Required information is denoted with an asterisk.' The form fields are:

- * Location Code: 7
- * Org. Code (Known as "Account" in PPS): [Dropdown]
- * Fund (xxxxx): [Text]
- Project Code (Between 1 and 6 characters. Also known as Activity): [Text]
- Cost Center: [Text]
- * Sub: [Dropdown]
- FTE (x.xx or .xx): [Text]
- * Distribution Percent (x.xxxx or .xxxx): [Text]
- Distribution Begin: [Text] MM/DD/YYYY -or- MM-DD-YYYY
- * End Date: [Text] MM/DD/YYYY -or- MM-DD-YYYY
- Indefinite

At the bottom are buttons for 'ADD ENTRY' and 'CANCEL' (circled in red).

Complete the funding information and click the “Add Entry” button near the bottom of the page. You will be able to add as many funding entries as appropriate for the position(s).

Repeat the “Add New Entry” process until all funding information has been entered.

Attaching Supplemental Documents PC

The “Supplemental Documents” tab allows you to attach an organizational chart, memo or other supporting documents. Attached documents may be useful to others reviewing and approving a request or may be important as required documentation for the recruitment.

Note: If no attachments are required you may click the “Continue To Next Page” button and move on.

Attach a document by clicking the ‘Attach’ link on the same line as the document type you want to attach.

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
RMS Users are encouraged to make note in the Comments Tab when attaching documents here.						
4 Records						
Attach / Remove	Document Type	Attached Document	View Document			
Attach	Organizational Chart	Not Attached				
Attach	Memo	Not Attached				
Attach	Other	Not Attached				
Attach	Previous Job Description	Not Attached				

After clicking the “Attach” button, you will see a screen similar to the one below.

You will have 2 options for attaching a document:

1. The “Upload a new document” method allows you to attach a document stored on your computer in one of the following common formats:
 - Adobe Acrobat (.pdf)
 - Microsoft Word, Excel (.doc, .xls)
2. The “Paste a new document” method allows you to attach a document that is of another format using the copy/paste method or allows you to type text directly into the area provided.

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
<p>RMS Users are encouraged to make note in the Comments Tab when attaching documents here. Return to Previous</p> <p>Please choose one of the following methods to associate a document.</p> <p>Upload a new document: Browse below to select a document to associate. Supported document types: Word, Excel, PPT, PDF, JPEG, Visio, RTF. File: <input type="text"/> <input type="button" value="Choose..."/></p> <p>ATTACH</p> <p>Paste a new document: Please either copy and paste document text or type from scratch into the box below to associate a document. Text: <input type="text"/></p> <p>ATTACH</p> <p>Return to Previous</p> <p><input type="button" value="RETURN TO PREVIOUS"/> <input type="button" value="CONTINUE TO NEXT PAGE >>"/></p>						

Note: there are two "Attach" buttons on this screen. Be sure to click the "Attach" button which corresponds to the method you choose (either "Upload a new document" or "Paste a new document").

Attaching Supplemental Documents PC –Locating and Attaching

To use the “Upload a new document” method click the “Browse” button to locate the document you intend to attach. For PC users the dialogue box to the right will appear. Select the document and click the “Open” button in the dialogue box.

SEARCH ALL RECS
CLASSIFICATION
 SEARCH ALL
POSITION DESCRIPTIONS
 SEARCH ALL REQUESTS
 VIEW PENDING REQUESTS
 SEARCH ALL PDS
ADMIN
 HOME
 CHANGE PASSWORD
 LOGOUT

RMS Users are encouraged to make note in the Com
[Return to Previous](#)

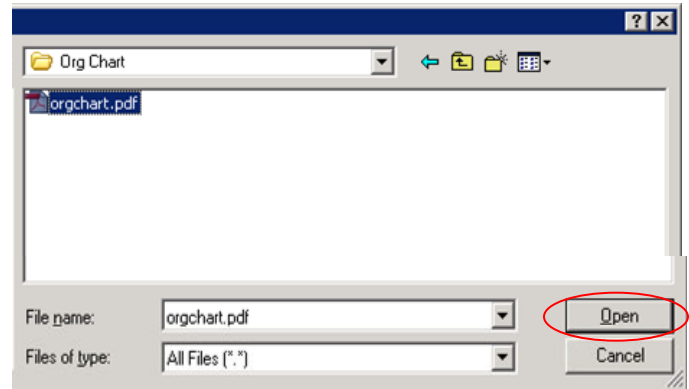
Please choose one of the following methods to assoc

Upload a new document:
 Browse below to select a document to associate. Su
 PDF, JPEG, Visio, RTF.

File: **Browse...**

ATTACH

Paste a new document:



SEARCH ALL
POSITION DESCRIPTIONS
 SEARCH ALL REQUESTS
 VIEW PENDING REQUESTS
 SEARCH ALL PDS
ADMIN
 HOME
 CHANGE PASSWORD
 LOGOUT

• RMS USER TOOLKIT
 • EMPLOYMENT SERVICES
 • STAFF HR HOME
 • UCSC HOME

Job Description / Position Information | Job Duties | Requisition Information | Funding Information | **Supplemental Documents**

RMS Users are encouraged to make note in the Comments Tab when attaching
[Return to Previous](#)

Please choose one of the following methods to associate a document.

Upload a new document:
 Browse below to select a document to associate. Supported document types: '
 PDF, JPEG, Visio, RTF.

File: D:\SHR Forms-Admin\Org **Browse...**

ATTACH

When you click the “Open” button the location path to the document will appear in the space next to the “Browse” button.

Click the “Attach” button to attach the document.

After clicking “Attach” you will get the following confirmation page. Click the “Confirm” button to complete the attach process.

SEARCH ALL
POSITION DESCRIPTIONS
 SEARCH ALL REQUESTS
 VIEW PENDING REQUESTS
 SEARCH ALL PDS
ADMIN
 HOME
 CHANGE PASSWORD
 LOGOUT

• RMS USER TOOLKIT
 • EMPLOYMENT SERVICES
 • STAFF HR HOME
 • UCSC HOME

Job Description / Position Information | Job Duties | Requisition Information | Funding Information | **Supplemental Documents** | Comments | Request History

RMS Users are encouraged to make note in the Comments Tab when attaching documents here.
 Click the **Confirm** below to attach the document.

GO BACK **CONFIRM**

<< RETURN TO PREVIOUS | CONTINUE TO NEXT PAGE >>

SAVE AND STAY ON THIS PAGE

Attaching Supplemental Documents PC – Viewing or Removing

After clicking the “Confirm” button, you will see a screen similar to the one below. This screen gives you the option of viewing or removing the attached document(s) as needed.

• Welcome **Donna D Approver**. You are logged in. Friday, October 3, 2008

View/Edit Non-Recruitment - 0801897

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
RMS Users are encouraged to make note in the Comments Tab when attaching documents here.						
4 Records						
Attach / Remove	Document Type	Attached Document	View Document			
Remove	Organizational Chart	Attached	View			
Attach	Memo	Not Attached				
Attach	Other	Not Attached				
Attach	Previous Job Description	Not Attached				

Click the “Continue to Next Page” button to go to the next tab.

Attaching Supplemental Documents Mac

The “Supplemental Documents” tab allows you to attach an organizational chart, memo or other supporting documents. Attached documents may be useful to others reviewing and approving a request or may be important as required documentation for the recruitment.

Note: If no attachments are required you may click the “Continue To Next Page” button and move on.

Attach a document by clicking the ‘Attach’ link on the same line as the document type you want to attach.

Attach / Remove	Document Type	Attached Document	View Document
Attach	Organizational Chart	Not Attached	
Attach	Memo	Not Attached	
Attach	Other	Not Attached	

After clicking the “Attach” button, you will see a screen similar to the one below.

You will have 2 options for attaching a document:

1. The “Upload a new document” method allows you to attach a document stored on your computer in one of the following common formats:
 - a. Adobe Acrobat (.pdf)
 - b. Microsoft Word, Excel (.doc, .xls)
2. The “Paste a new document” method allows you to attach a document that is of another format using the copy/paste method or allows you to type text directly into the area provided.

Upload a new document:
Browse below to select a document to associate. Supported document types: Word, Excel, PPT, PDF, JPEG, Visio, RTF.
File: Choose File no file selected
Macintosh Users: Please select the correct file type from the dropdown below.
File type: Microsoft Word
[Attach](#)

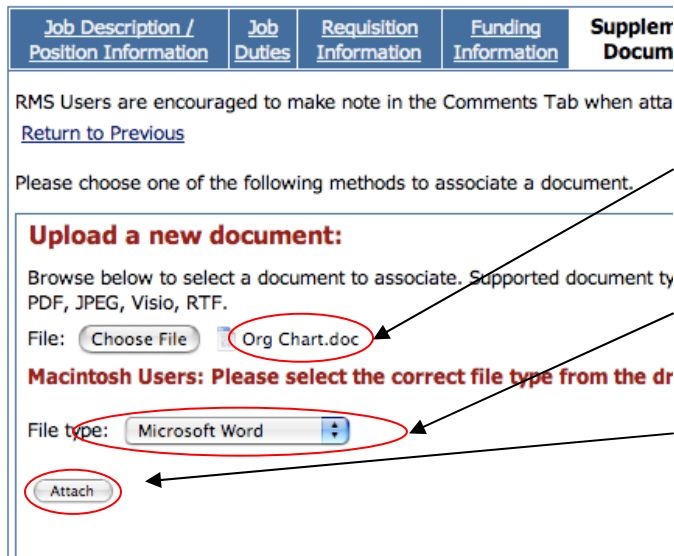
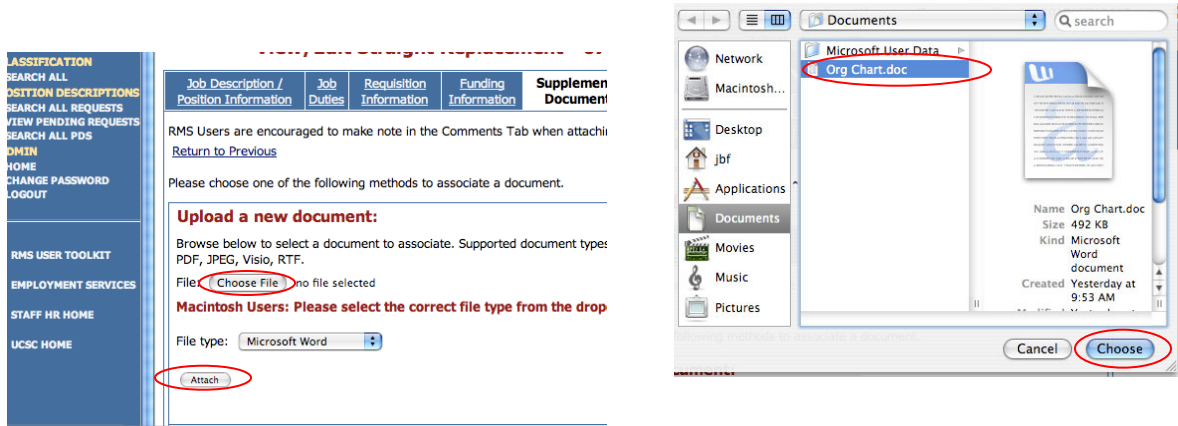
Paste a new document:
Please either copy and paste document text or type from scratch into the box below to associate a document.
Text:

[Attach](#)

Note: there are two “Attach” buttons on this screen. Be sure to click the “Attach” button which corresponds to the method you choose (either “Upload a new document” or “Paste a new document”).

Attaching Supplemental Documents Mac-Locating and Attaching

To use the “Upload a new document” method click the “Choose File” button to locate the document you intend to attach. For Mac users the dialogue box to the below-right will appear. Select the document, be sure you have chosen the correct file type from the drop down menu, and then click the “Choose” button in the dialogue box.

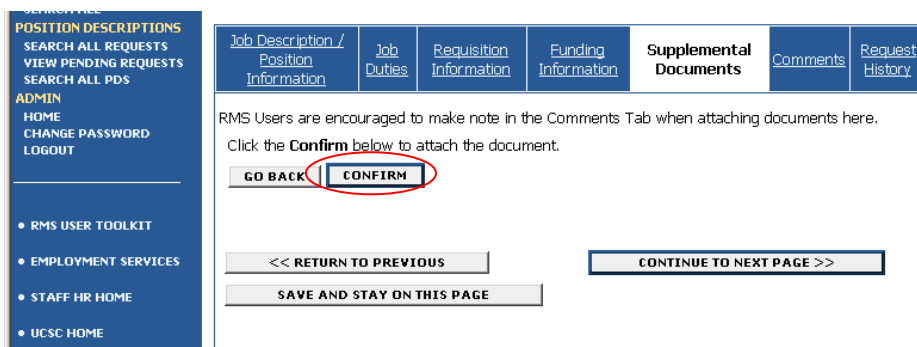


When you click the “Choose” button the name of the document will appear in the space next to the “Choose File” button.

Choose the correct file type from the drop down menu.

Click the “Attach” button to attach the document.

After clicking “Attach” you will get the following confirmation page. Click the “Confirm” button to complete the attach process.



Attaching Supplemental Documents Mac – Viewing or Removing

After clicking the “Confirm” button, you will see a screen similar to the one below. This screen gives you the option of viewing or removing the attached document(s) as needed.

• Welcome **Donna D Approver**. You are logged in. Friday, October 3, 2008

View/Edit Non-Recruitment - 0801897

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
RMS Users are encouraged to make note in the Comments Tab when attaching documents here.						
4 Records						
Attach / Remove	Document Type	Attached Document	View Document			
Remove	Organizational Chart	Attached	View			
Attach	Memo	Not Attached				
Attach	Other	Not Attached				
Attach	Previous Job Description	Not Attached				

Click the “Continue to Next Page” button to go to the next tab.

Comments

The “Comments” tab is a useful tool for sharing information with other RMS users.

Note: Information provided here is viewable by all RMS users with access to the request. Comments entered here cannot be viewed by applicants.

RECRUITMENTS/OFFERS
POSTED/CLOSED RECS
PENDING RECS
HISTORICAL RECS
SEARCH ALL JOB OFFERS
SEARCH ALL RECS
CLASSIFICATION
SEARCH ALL
POSITION DESCRIPTIONS
SEARCH ALL REQUESTS
VIEW PENDING REQUESTS
SEARCH ALL PDS
ADMIN
HOME
CHANGE PASSWORD
LOGOUT

• Welcome **Donna D Approver**. You are logged in. Friday, October 3, 2008

View/Edit Non-Recruitment - 0801897

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
----------------------------------------	------------	-------------------------	---------------------	------------------------	----------	-----------------

<< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >>

PLEASE NOTE: Information provided here will be viewable by all users with access to this request.
*Required information is denoted with an asterisk.

Enter Comments Here

Certified Hiring Manager (CHM)	
Human Resources Partner (HRP)	
Recruitment Specialist (RS)	
Divisional Approver (DA)	Divisional Approver enters comments here.
Classification Analyst (CA)	
System Administrator (SA)	

*Required information is denoted with an asterisk.

<< RETURN TO PREVIOUS **CONTINUE TO NEXT PAGE >>**

SAVE AND STAY ON THIS PAGE

CANCEL **VIEW REQUEST SUMMARY >>**

After making comments, click the “Continue To Next Page” button to view the “History Tab”, or click the “View Request Summary” button to go directly to the Request Status page where you may approve the request or direct the request to the next appropriate stage of the workflow.

History Tab

The "Request History" tab allows you to review the progression of the request through the workflow.

The "View Summary" links allow you to view the details of the request as it appeared at each stage.

Click the "Continue To Next Page" button or the "View Request Summary" button to go to the "Request Status" page. From the "Request Status" page you can make selections to direct the request to next appropriate stage of the workflow.

NOTE: The "View Request Summary" button appears at the bottom of each tab. You may click this button at any point in your review, from any tab, to go directly to the "Request Status" page.

The screenshot displays a web interface for managing a non-recruitment request. At the top, a welcome message for Donna D Approver is shown along with the date Friday, October 3, 2008. The main heading is "View/Edit Non-Recruitment - 0801897". Below this is a navigation bar with tabs for Job Description / Position Information, Job Duties, Requisition Information, Funding Information, Supplemental Documents, Comments, and Request History. The Request History tab is active, showing a table with columns for History and Modified By. The table contains three entries, each with a timestamp and a "View Summary" link circled in red. At the bottom of the page, there are buttons for navigation: "<< RETURN TO PREVIOUS", "CONTINUE TO NEXT PAGE >>", "SAVE AND STAY ON THIS PAGE", "CANCEL", and "VIEW REQUEST SUMMARY >>" (the latter is also circled in red).

RECRUITMENTS/OFFERS
POSTED/CLOSED RECS
PENDING RECS
HISTORICAL RECS
SEARCH ALL JOB OFFERS
SEARCH ALL RECS
CLASSIFICATION
SEARCH ALL
POSITION DESCRIPTIONS
SEARCH ALL REQUESTS
VIEW PENDING REQUESTS
SEARCH ALL PDS
ADMIN
HOME
CHANGE PASSWORD
LOGOUT

• RMS USER TOOLKIT
• EMPLOYMENT SERVICES
• STAFF HR HOME
• UCSC HOME

Welcome Donna D Approver. You are logged in. Friday, October 3, 2008

View/Edit Non-Recruitment - 0801897

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
History						Modified By
10-02-2008 2:27 PM						Jean Fargo
<i>Request Saved, Not Submitted</i>						
View Summary						
10-02-2008 3:16 PM						Jean Fargo
<i>Pending Rec. Specialist Review</i>						
View Summary						
10-02-2008 3:32 PM						Rebecca R Specialist
<i>Pending Divisional Approval</i>						
View Summary						

<< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >>

SAVE AND STAY ON THIS PAGE

CANCEL [VIEW REQUEST SUMMARY >>](#)

Approving the Request

After clicking the “Continue To Next Page” or the “View Request Summary” button you will see a screen similar to the one below, the Request Status page.

- “Save at Current Status” will allow you to save your data and continue working on the request at a later time. The request will not move forward in the workflow.
- “Problem with Request” will return the request to the HRP to make necessary adjustments. Be sure to include comments detailing the adjustments needed. The request will come back to you for review/approval.
- “Request Classification Review” will move the request forward in the workflow to a status of “Pending Classification Review”. **Note:** Selecting this status indicates your approval of the request.
- “Withdraw Request” will permanently cancel the recruitment request.

Note: (See the Email Notifications section to see when emails are generated and who receives them)

Select the appropriate radio button, click “Continue” to go to the confirmation page, then click “Confirm”.

The screenshot shows the 'Request Status' page. On the left is a navigation menu with categories: SEARCH ALL JOB OFFERS, SEARCH ALL RECS, CLASSIFICATION, POSITION DESCRIPTIONS, and ADMIN. The main content area has a header 'To change the status of this request, choose from the statuses below:' with links for 'Edit' and 'Printer-Friendly Version'. Below this is a 'Request Status' section with four radio button options: 'Save at Current Status', 'Problem with Request', 'Request Classification Review' (which is selected), and 'Withdraw Request (Permanent Action - Non-Reversible!)'. At the bottom of this section are 'CANCEL' and 'CONTINUE' buttons, with 'CONTINUE' circled in red. Below the status options is a 'Job Description / Position Information' table with two rows: 'Request Number' (0801897) and 'Request Type' (Non-Recruitment).

Job Description / Position Information	
Miscellaneous Information	
Request Number	0801897
Request Type	Non-Recruitment

The screenshot shows the 'Confirm Change Request Status' page. At the top, a yellow banner displays 'Welcome Donna D Approver. You are logged in.' and 'Friday, October 3, 2008'. The main heading is 'Confirm Change Request Status' in red. Below the heading, it says 'You are about to change this request to the following status:'. A 'Request Status' section shows 'Request Classification Review' selected. At the bottom are 'GO BACK' and 'CONFIRM' buttons, with 'CONFIRM' circled in red.

Request Status	
Request Classification Review	

APPROVING A JOB OFFER

Searching for a Job Offer Request

You will receive a system-generated email when a job offer request requires your approval.

Note: You will only be required to approve job offers that are above the minimum salary, the appointment % time has increased, additional offers not previously approved, moving expenses, etc.

To review and approve the job offer request:

- Login to the system
- Under Recruitments/Offers in the left navigation bar click “Search All Job Offers”
- Check the Request Status box “Job Offer Pending Divisional Approval”
- Click “Search”

You may also check any combination of boxes to search for a job offer request at another status or when you don't know the current status. This search feature is useful when you have already approved a job offer and you would like to see where it is in the workflow.

Viewing a Job Offer Request Requiring Approval

Click the “View” link under the classification title to open the job offer request pending approval.

Classification	Job Number	Rec. Type	CHM	Candidate Last Name	Current Status	First Submitted to HR
ASST DEAN (FUNCTIONAL AREA) [0384] View	0801790	Open	C H Manager, Cathy	Apple	Job Offer Pending Divisional Approval	

Reviewing and Approving a Job Offer Request

Review the information in the “Job Offers Details” tab. If any of the details are incorrect or missing, you will send the job offer request to your HRP for adjustments. Make careful notes in the “Comments” tab with instructions for your HRP.

Note:

The “Final Terms & Conditions” tab will be completed by the Recruitment Specialist after the formal job offer has been completed.

Review the information in the “Funding Information” tab and edit as necessary.

Use the “Comments” tab to clearly document the following: what you are approving (e.g., include the exact salary, change in % of time, approved moving expenses), edits you made to the “Funding Information” tab, problems you identified for your HRP to correct. Thorough comments will ensure appropriate and timely job offer processing by the HRP and Recruitment Specialist.

After making comments, click the “Continue To Next Page” button to view the “History Tab”, or click the “View Request Summary” button to go directly to the Request Status page where you may approve the job offer or direct it to your HRP for edits/corrections.

Welcome Donna D Approver. You are logged in.
Friday, October 3, 2008

View/Edit Begin Job Offer - Apple - 0801790

Job Offer Details
Final Terms & Conditions
Funding Information
Waiver Information
Comments
Request History

CONTINUE TO NEXT PAGE >>

*Required information is denoted with an asterisk.

Recruitment Info	
Job Number	0801790
Request Type	Update to Fill
Recruitment Type	Open
<u>Position Description (PD) Number</u>	
Division/Organization	Social Sciences [318]
Department/Unit	Soc Sci : Soc Sci, Dean's Office [4089-318-34]
Responsible Certified Hiring Manager	C H Manager, Cathy
Enter name of Hiring Manger here (type NA if same as above).	Sheldon Kamieniecki
Hiring Manager Phone <small>xxxx-xxxx-xxxx</small>	831-459-3212
Hiring Manager Email	skl@ucsc.edu
Responsible Divisional Approvers	D Approver, Donna D Approver, Donald
Responsible HR Partner	H R Partner, Helen
HR Partner Phone <small>xxxx-xxxx-xxxx</small>	831-459-5425
HR Partner Email	hrp@ucsc.edu
Service Team Representative <small>(Note: Individual responsible for Service Team on-boarding.)</small>	Sussie Brown
Salary to Offer Note: Appointments made above the minimum of the salary range must be approved by the Divisional Approver.	\$7000.00
Is this a Critical Position?	Yes
If yes, please check all applicable pre-employment background checks	Criminal History Review
If you selected "license, certificate or degree" above, specify the type here:	
Will the employee be required to participate in the DMV Pull Notice Program?	No
Is this position considered a designated official? <small>Click Here to review the list.</small>	No
All pre-offer background checks complete?	No
Additional instructions for recruitment specialist regarding this job offer	

*Required information is denoted with an asterisk.

SAVE AND STAY ON THIS PAGE
CONTINUE TO NEXT PAGE >>

CANCEL
VIEW REQUEST SUMMARY >>

Reviewing and Approving a Job Offer Request Continued

After clicking the “Continue To Next Page” button or the “View Request Summary” button you will see a screen similar to the one below.

- “Save at Current Status” button will allow you to save your data and continue your work on the job offer request at a later time. The job offer request will not move forward in the work flow.
- “Approve Offer Pending” button will move the request forward in the workflow to a status of “Offer Pending” and alert the Recruitment Specialist that the job offer request is ready for review.
- “Problem w/Job Offer” button will return the job offer request to the HRP to make necessary adjustments. Be sure to include comments detailing the adjustments needed.
- “Cancel Request to Offer” button will *permanently* cancel the job offer request.

Note: (See the Email Notifications section to see when emails are generated and who receives them)

When the Recruitment Specialist completes their review and all approval steps are complete, the Recruitment Specialist will extend the formal job offer, secure a start date and/or sign-up date, complete the “Final Terms & Conditions” tab, and status the job offer as “Approved to Hire”.

Select the appropriate radio button, click “Continue” to go to the confirmation page, then click “Confirm”.

Note: Once you move a job offer request to a status of “Offer Pending”, you will have view-only rights. If further divisional approval is required (e.g., salary negotiation), the job offer request will be sent back to you for subsequent approval and/or comments.

• Welcome Donna D Approver. You are logged in. Monday, October 6, 2008

View Begin Job Offer Summary - Apple - 0801790

To change the status of this request, choose from the statuses below:

[Edit](#) [Printer-Friendly Version](#)

Request Status

Save at Current Status

Approve Offer Pending

Problem w/ Job Offer

Cancel Request to Offer (Permanent Action - Non-Reversible!)

CANCEL **CONTINUE**

Job Offer Details

Recruitment Info	
Job Number	0801790
Request Type	Update to Fill
Recruitment Type	Open
Position Description (PD) Number	
Division/Organization	Social Sciences [318]

Viewing a Completed Job Offer

A completed job offer will be at a status of “Approved to Hire” or “Hired”. To view the final details of the accepted job offer click the “Search All Job Offers” link under the Recruitments/Offers section of the left navigation bar.

Check the “Approved to Hire” and “Hired” request status boxes (or Check All), enter the recruitment number, & click “Search”.

• Welcome **Jean Fargo**. You are logged in as 15707 User. Monday, October 6, 2008

Search All Job Offers

Search All Job Offers

[Check All](#) [Clear All](#)

Request Status

- Job Offer Saved, No Offer Pending
- Job Offer Pending HRP Review
- Job Offer Pending Divisional Approval
- Offer Pending
- Problem with Job Offer
- Pending EEO/AA Waiver Opinion
- Pending Waiver Approval
- Offer In Progress
- Approved to Hire**
- Hired
- Cancelled Request to Offer
- Offer Rescinded
- Offer Declined

Recruitment Number for this Hire:

Division/ Organization:

Recruitment Type:

Selected Candidate Last Name:

SEARCH **CLEAR RESULTS**

Click the “View” link under the classification title to see the final details of the job offer.

View Job Offers

Job Offers

1 Record

Classification	Job Number	Rec. Type	CHM	Candidate Last Name	Current Status	First Submitted to HR
ANALYST, BUDGET [7253] View	0801760	Open		Last	Approved to Hire	09-15-2008

NON RECRUITMENT/WAIVER OF RECRUITMENT (NR/W) OVERVIEW

Reviewing a Request

The CHM/HRP initiates a Non-Recruitment or Waiver of Recruitment Request and the workflow is the same as the Open/Campus Only (O/CO) Request.

The review process for Non-Recruitment and Waiver of Recruitment Requests is the same as the O/CO Request review process, except for the differences noted below.

Note: When reviewing the “Job Description/Position Information” tab, it is very important to verify that the Request Type and the Recruitment Type match. If these fields do not match, add a comment in the “Comments” tab, status the request as “Problem with Request” and send the request back to the HRP to correct these fields.

• Welcome Donna D Approver. You are logged in. Monday, October 6, 2008

View/Edit Non-Recruitment - 0801897

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
CONTINUE TO NEXT PAGE >>						
*Required information is denoted with an asterisk.						
Miscellaneous Information						
Request Number	0801897					
Request Type	Non-Recruitment					
Recruitment Type	Non-Recruitment					
Copied from PD number	200163					

Review the “Requisition Information” tab. Remember the person to hire has been identified; you are approving the salary to offer the selected hire(s) *and* the level of benefits entered in request.

Complete the review process following the same steps you would for an O/CO request type.

View/Edit Non-Recruitment - 0801897

Job Description / Position Information	Job Duties	Requisition Information	Funding Information	Supplemental Documents	Comments	Request History
<< RETURN TO PREVIOUS CONTINUE TO NEXT PAGE >>						
*Required information is denoted with an asterisk.						
Appointment Information						
Appointment Type - Recruitment	Limited/Temporary					
Appointment Duration	With an end date					
End Date (Type "None" for Indefinite Appointments)	04/30/2009					
Start Date (Choose one)	Immediate Opening					
Percentage of Time (If BYA, enter zero)	100					
Fixed or Variable?	Fixed					
Shift Differential	No					
If yes, percentage of time						
Furlough	No					
If yes, basis	No Response					
If yes, furlough time period (Specify date range, number of weeks/months, or TBD)						
Salary to offer (Non-Rec or Waiver Only)	\$3423.00					
Benefits Eligibility (Click here for more information.)	This position is eligible for Mid-Level benefits.					
Schedule Information						
Schedule	Full time					

Recruitment Posted Email Notification

Divisional Approvers receive a copy of the system-generated email notification that the position has been posted. It is important to confirm that the position is posted correctly.

Non-Recruitments and Waivers of Recruitment are posted in a hidden way in RMS so they are not visible to the public. They can be accessed only by using a quicklink specific to the recruitment.

Divisional Approvers also receive a system-generated email notification when an offer has been formally accepted – this is true for all recruitment types.

(See the Email Notifications section to see when emails are generated and who receives them)

RMS System Generated Email

Subject Line: [RMS Job # 0801944] Non-Rec/Waiver Ready For Application

Recipients: CHM, HRP, DA

Email Content:

Please DO NOT RESPOND to this email. Replies to this email will not be answered. Contact information is provided below.

Dear RMS User,

The following recruitment is at a status of: Non-Rec/Waiver Posted.

Job # 0801621

Job Title: LC Testing to Create NR/W Posting

Div/Org: ARTS [317]

Recruitment Type: Non-Recruitment

Individuals selected for hire must apply using the recruitment quick link before a job offer can be initiated. A template communication has been provided below to enable your communication with the Selected Hire.

TEMPLATE EMAIL:

Dear [Fill Candidate name in here],

You have been selected for hire into the following position:

Job # 0801621

Job Title: LC Testing to Create NR/W Posting

Div/Org: ARTS [317]

Recruitment Type: Non-Recruitment

You must complete the following steps before a job offer can be extended to you:

-Go to <https://jobs.ucsc.edu>; create and store an application in the system.

-Use this link: <https://cs067.peopleadmin.com/applicants/Central?quickFind=63327> to access the job posting; click the "Apply For This Position" button within the job details page. If this link does not take you to the page, copy and paste the URL into your browser's address bar.

← Quicklink

-Attach cover letter, resume, and up to three additional documents to your application as appropriate.

You will receive a formal job offer from UCSC Staff Human Resources after your application materials have been received.

Questions should be directed to: Human Resources Partner Castro, Lori, 555-555-5555, lcastro@ucsc.edu.

Thank you,
Castro, Lori

EMAIL NOTIFICATIONS

RMS generates emails when there is a status change to a request, recruitment, or a job offer.

The emails inform recipients of action that needs to be taken or of action that has been taken of interest to the recipient.

Please familiarize yourself with the emails you and other users will receive.

NOTE: The email indicating your position has been posted is of special importance: it confirms whether your position has been posted as either an *Open/CO Recruitment* and is viewable to the public or as a *Non-Rec/Waiver Recruitment* which is a hidden posting and is viewable only via the use of a quicklink specific to the RMS job number.

If your recruitment is not posted correctly please inform the System Administrator immediately at: rms-help@ucsc.edu 459-5444.

On the following page there is a chart listing the status changes which prompt an email, the RMS User Type recipients who receive emails, and the subject line of the various emails. The list can be viewed electronically at: <http://shr.ucsc.edu/topics/rms/rms-email-list.pdf> and is updated when new emails are added.

Email Recipient List

RMS Email Recipient List

<u>RMS Status</u>	<u>Recipient(s)</u>	<u>Email Subject Line</u>
Pending Referral	Applicant	UCSC Employment Application/Job #:xxxxxxx
Withdrawn per Applicant Request	Applicant	UCSC Employment Application/Job #:xxxxxxx
Pending HRP Review	HRP	[RMS Job #:xxxxxxx] Request Pending HRP Review
Pending Rec. Specialist Review	RS	[RMS Job #:xxxxxxx] Pending Rec. Specialist Review
Problem with Request	CHM, HRP	[RMS Job #:xxxxxxx] Problem with Request
Request Withdrawn	CHM, HRP, RS, DA	[RMS Job #:xxxxxxx] Request Withdrawn
Pending Divisional Approval	DA	[RMS Job #:xxxxxxx] Request Pending Divisional Approval
Pending Classification Review	CA	[RMS Job #:xxxxxxx] Pending Classification Review
Approved To Fill: Open Rec/CO	CHM, HRP, RS, DA	[RMS Job #:xxxxxxx] Approved to Fill
Approved To Fill: Open Rec/CO (New to RMS)	CHM, HRP, RS, DA	[RMS Job #:xxxxxxx] Approved to Fill
Open-Rec/CO Posted Pre-IRD	CHM, HRP, DA	[RMS Job #:xxxxxxx] Open-Rec/CO Posted Pre-IRD
Open-Rec/CO Posted	RS	[RMS Job #:xxxxxxx] IRD Has Passed
Open-Rec/CO Completed (H)	CHM, HRP	[RMS Job #:xxxxxxx] Open-Rec/CO Completed OR Re-Open Request Denied
Open-Rec/CO Withdrawn	CHM, HRP	[RMS Job #:xxxxxxx] Open-Rec/CO Withdrawn or Re-Opened Request Denied
Open-Rec/CO Pending Approval: Pool Re-Activate	RS	[RMS Job #:xxxxxxx] Open-Rec/CO Pending Approval: Pool Re-Activate
Open-Rec/CO Pending Approval: Pool Re-Activate (H)	RS	[RMS Job #:xxxxxxx] Open-Rec/CO Pending Approval: Pool Re-Activate
Open-Rec/CO Pool Re-Activated	CHM, HRP	[RMS Job #:xxxxxxx] Open-Rec/CO Pool Re-Activated
Open-Rec/CO Pool Re-Activated (H)	CHM, HRP	[RMS Job #:xxxxxxx] Open-Rec/CO Pool Re-Activated
Job Offer Pending HRP Review	HRP	[RMS Job #:xxxxxxx] Offer Pending HRP Review
Job Offer Pending Divisional Approval	DA, CHM	[RMS Job #:xxxxxxx] Offer Pending Divisional Approval
Offer Pending	CHM, RS	[RMS Job #:xxxxxxx] Offer Pending
Problem with Job Offer	CHM, HRP	[RMS Job #:xxxxxxx] Problem with Job Offer
Cancelled Request to Offer	CHM, HRP, RS, DA	[RMS Job #:xxxxxxx] Cancelled Request to Offer
Offer Declined	CHM, HRP	[RMS Job #:xxxxxxx] Offer Declined
Approved to Hire	CHM, HRP, DA	[RMS Job #:xxxxxxx] Offer Accepted
Approved to Fill: Non Rec/Waiver	CHM, HRP, RS, DA	[RMS Job #:xxxxxxx] Approved to Fill: Non-Rec/Waiver
Non-Rec/Waiver Posted	CHM, HRP, DA	[RMS Job #:xxxxxxx] Non-Rec/Waiver Ready For Application
Applicant - Selected Hire	CHM, HRP	[RMS Job #:xxxxxxx] Time To Initiate Non-Rec/Waiver Job Offer
Non-Rec/Waiver Completed (H)	CHM, HRP	[RMS Job #:xxxxxxx] Non-Rec/Waiver Completed OR Re-Post Denied
Non-Rec/Waiver Withdrawn	CHM, HRP	[RMS Job #:xxxxxxx] Non-Rec/Waiver Withdrawn OR Re-Post Denied
Non-Rec/Waiver Pending Approval: Re-Post	RS	[RMS Job #:xxxxxxx] Non-Rec/Wavier Pending Approval: Re-Post
Non-Rec/Waiver Pending Approval: Re-Post (H)	RS	[RMS Job #:xxxxxxx] Non-Rec/Wavier Pending Approval: Re-Post
Off-Line Correction Pending	CHM, HRP, DA, RS	[RMS Job #:xxxxxxx] Off-Line Correction Pending

Legend: Certified Hiring Manager (**CHM**), Human Resource Partner (**HRP**), Recruitment Specialist (**RS**), Divisional Approver (**DA**)

ADMINISTRATIVE FUNCTIONS

.....

Changing Your Password

To change your password, click the “Change Password” link under the Admin section of the left navigation bar, and enter the required information. The change will be updated automatically.

• Welcome **Donna D Approver**. You are logged in. Monday, October 6, 2008

Change Password

To change your password, please enter your current password followed by a new one.

Password Information

Current Password:	<input type="text"/>
New Password:	<input type="text"/>
Confirm Password:	<input type="text"/>

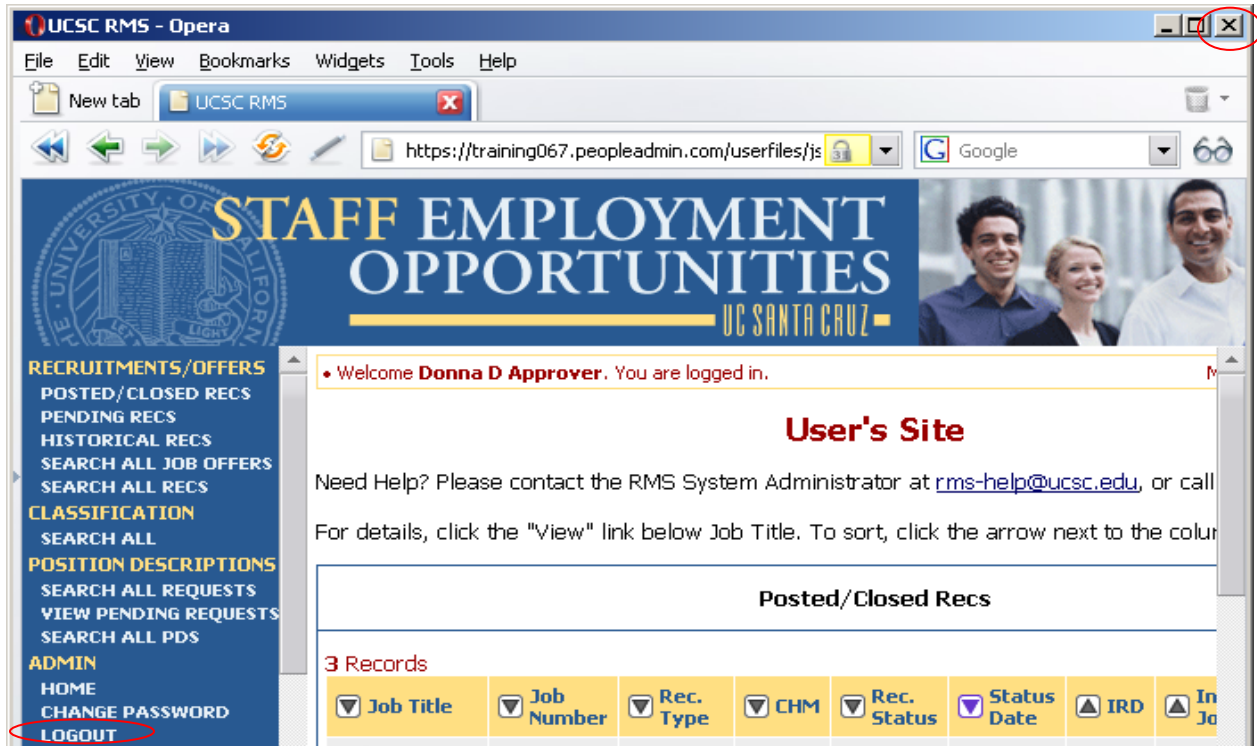
Logging Out

The RMS database contains electronic restricted data. To ensure the security of this and other sensitive data, **the system will automatically log you out after 60 minutes when no activity is detected.**

Anytime you leave your computer, even briefly, we strongly recommend that you save any work in progress and logout of the system by clicking on the "Logout" link located under "Admin" at the bottom of the left navigation bar.

Note: It is important that you always first logout of RMS then close your browser window by clicking the **X** in the upper right-hand corner of the browser window for PC users, or the red circle in the upper left-hand corner for Mac users.

PC



Mac

