DIVISIONAL APPROVER
USER GUIDE

University of California Santa Cruz
Recruitment Management System

12/21/2012

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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

We recommend that you use Safari, versions 3+ or 4. We don't recommend older 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 4.+ **Recommended PC Users**
Safari 4.0 + **Recommended for Mac Users**
Internet Explorer Not recommended

To have a browser installed please see **ITS Standard Desktop Support** at http://its.ucsc.edu/standard-desktop-support/index.html or the **ITS Customer Support** at http://its.ucsc.edu/get-help/index.html

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.

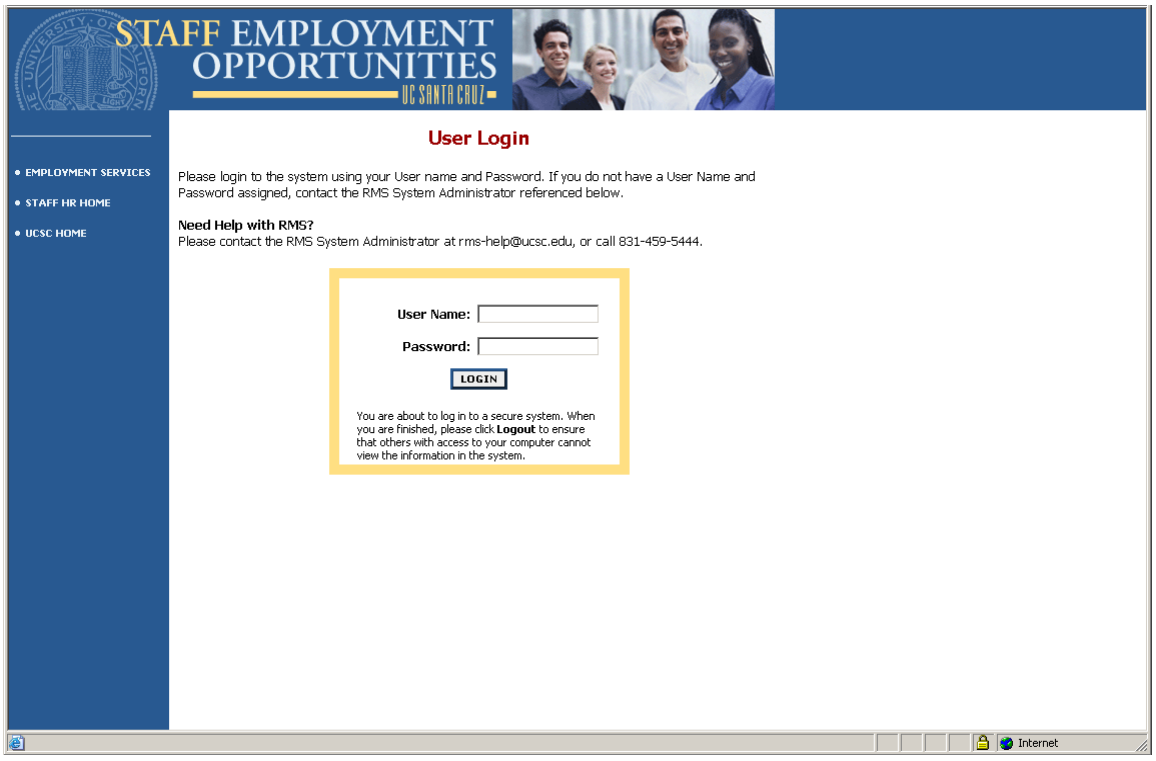
Your Employee & Labor Relations (ELR) Analyst can provide advice and consultation regarding the policies and procedures related to staff recruitment and hiring. (ELR Analyst known at Human Resource Partner (HRP) in RMS).

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

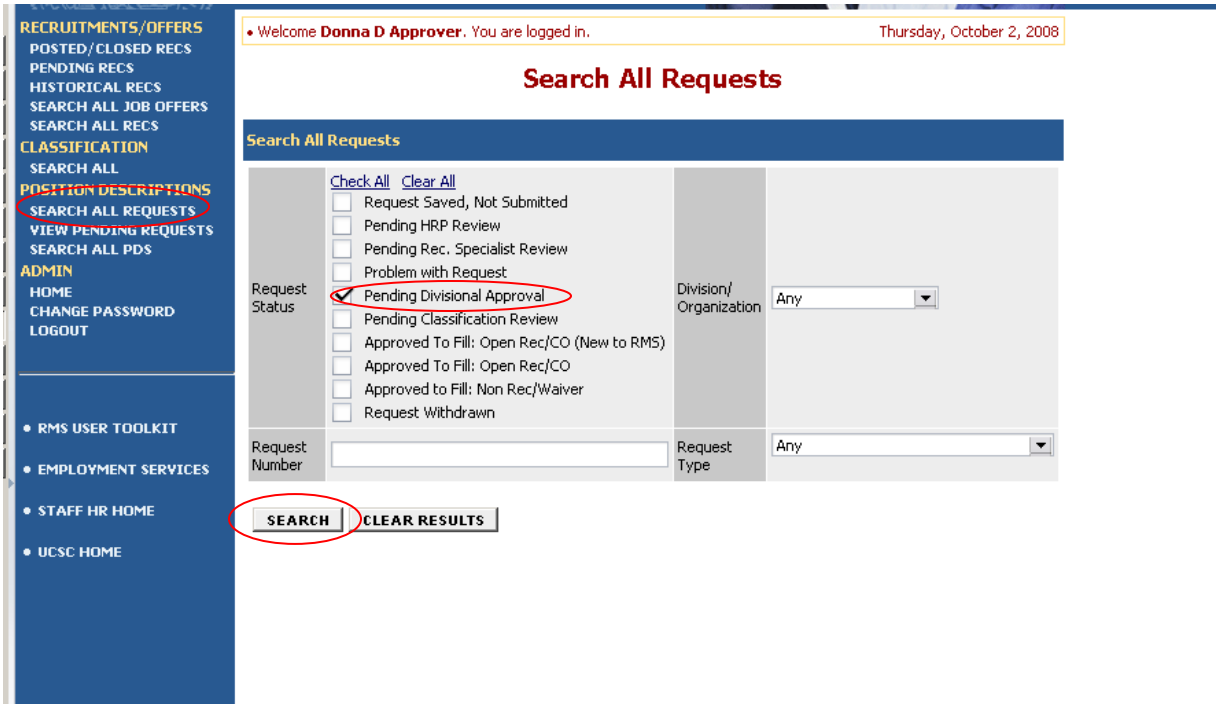
Search All Requests

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”.

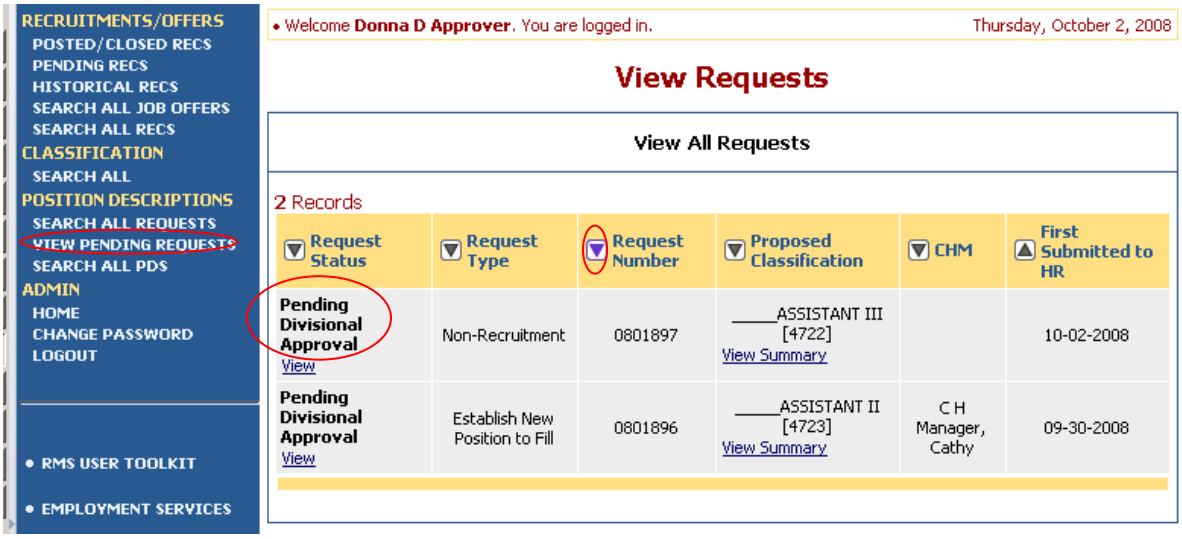


View Pending Requests

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.

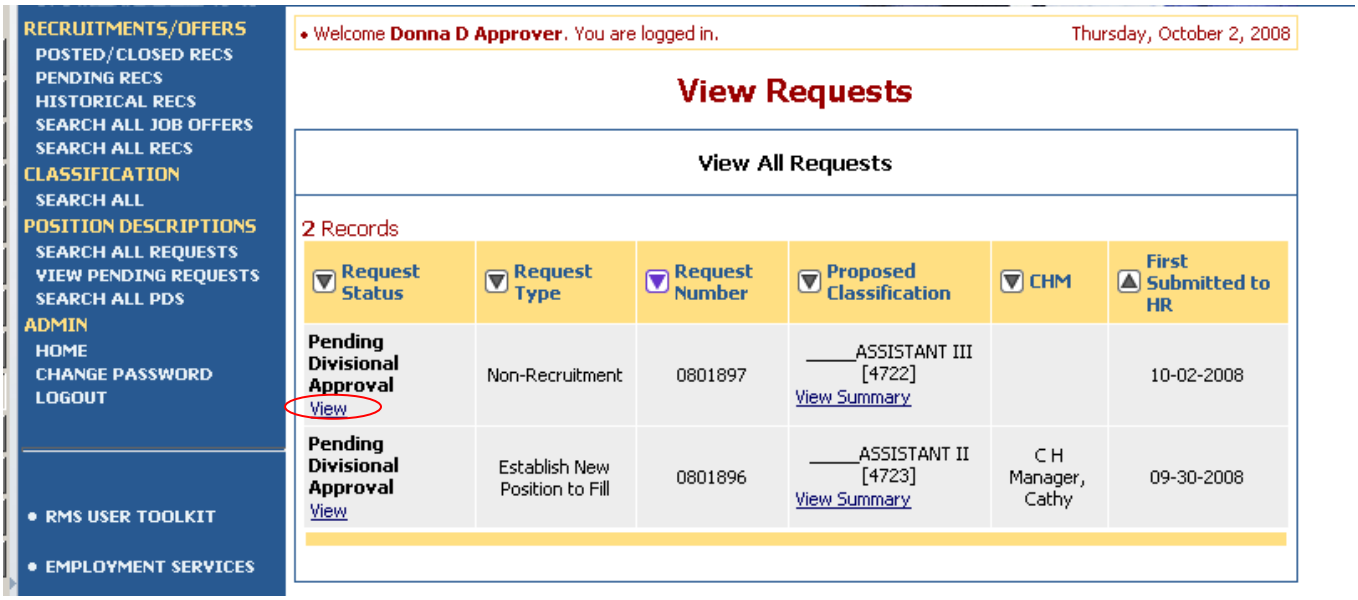
Each column can be sorted by clicking the arrow at the top of the column. The column with the brighter blue arrow indicates the displayed data is being sorted by that column.

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.



Viewing a Request

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



Reviewing Requests

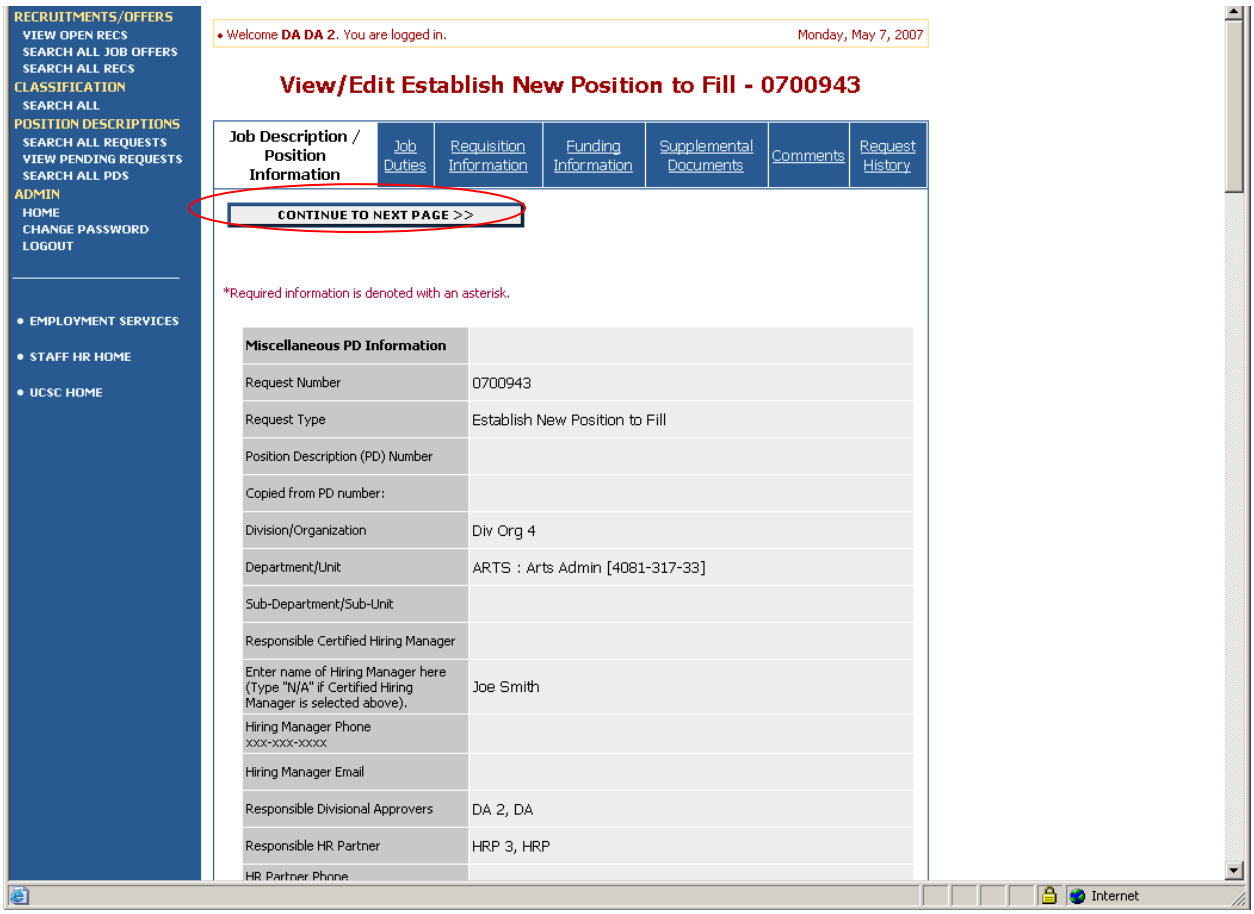
After clicking “View” you will see a screen similar to the one below displaying the first of several tabs.

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.



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.

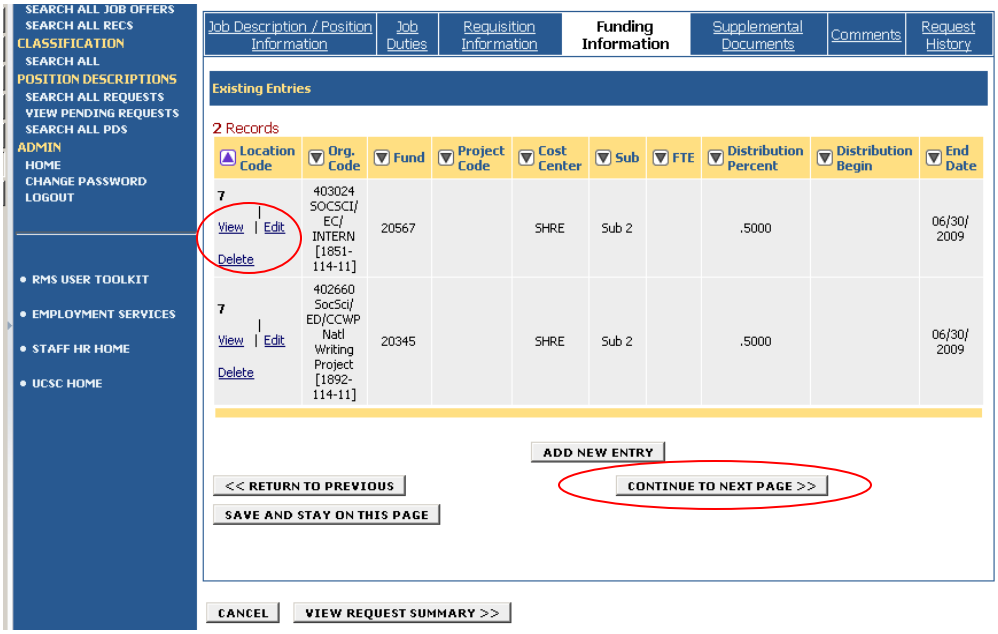
Note for Open/Campus Only Recruitment: The salary you approve in the Open/Campus Only Request Types is a minimum salary, a salary range, or a salary commensurate with qualifications and experience which your department intends to post publically. Later in the process, when a Job Offer Request is initiated,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

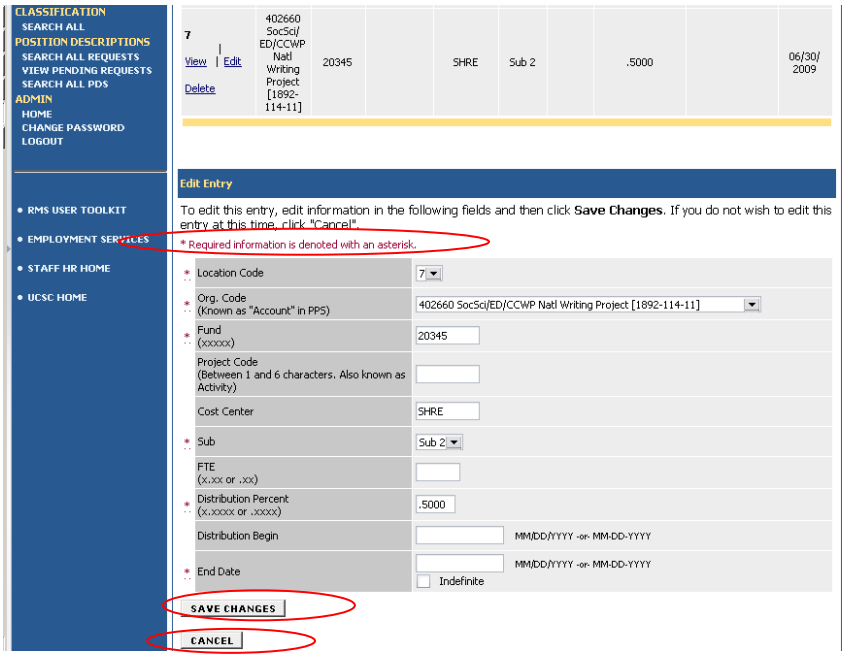
To edit the funding information, click the “Edit” link associated with the funding line you intend to edit.



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

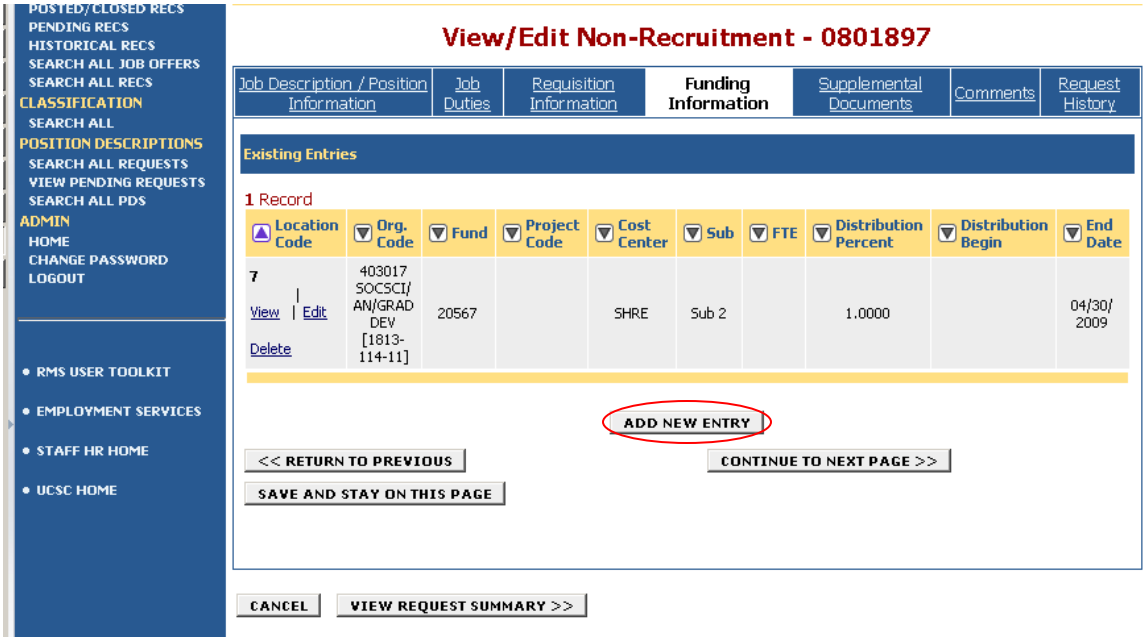
Note: RMS will display a red asterisk (*) to the right of all required fields. You must add data to these fields in order to save your work and/or continue to other tabs.

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

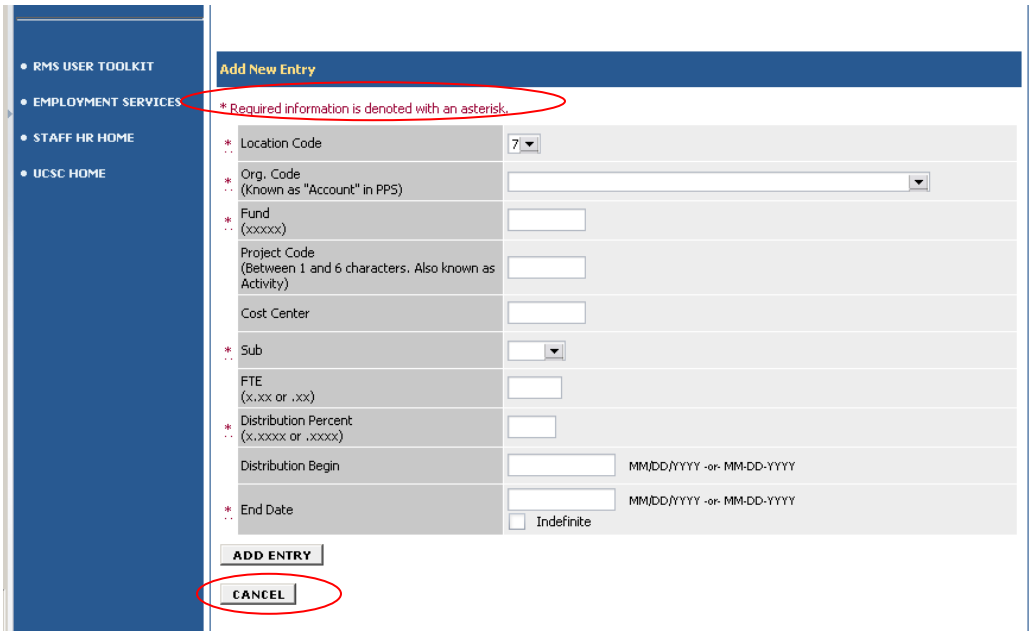


Adding a new Entry to the Funding Information Tab

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



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



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).

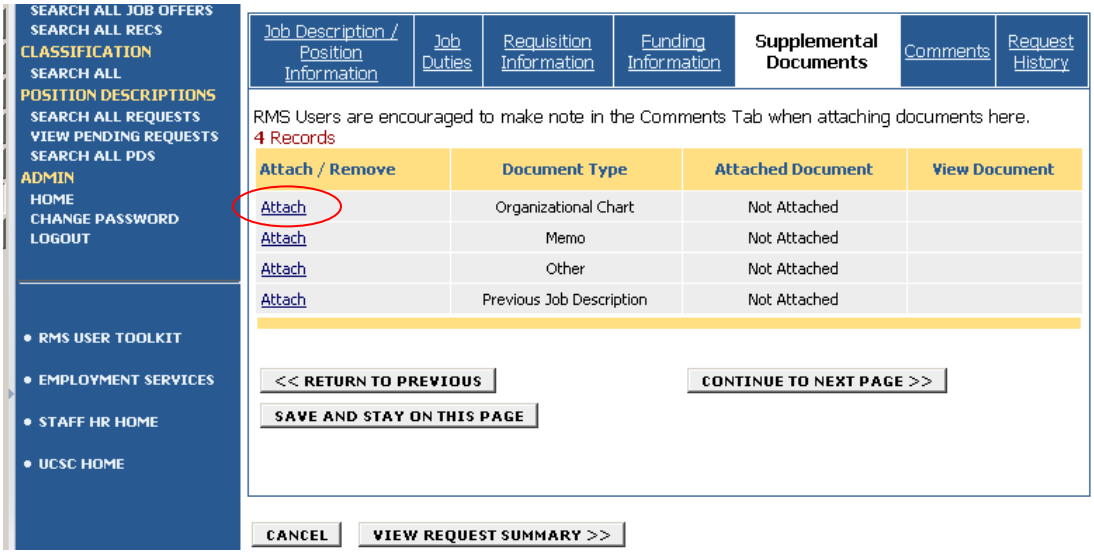
Repeat the “Add New Entry” process until all funding information has been entered.

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.

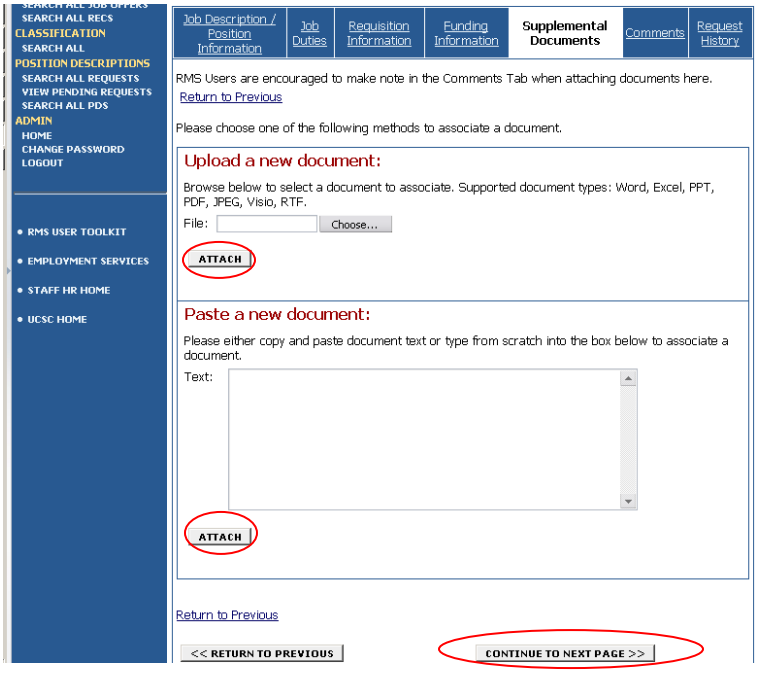
Attach a document by clicking the ‘Attach’ link on the same line as the document type you want to attach.



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

You will have 2 options for attaching a document:

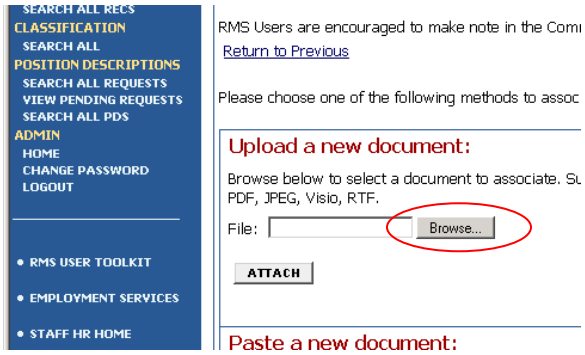
1. The “Upload a new document” method allows you to attach a document stored on your computer in one of the following common formats:
    - Adobe Acrobat (.pdf)
    - Microsoft Word, Excel (.doc, .xls)
2. The “Paste a new document” method allows you to attach a document that is of another format using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

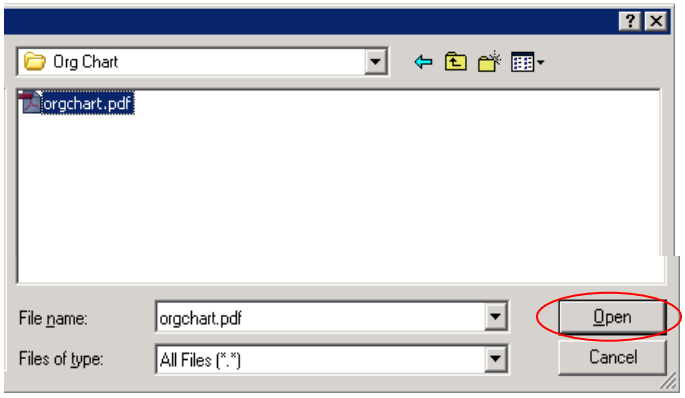


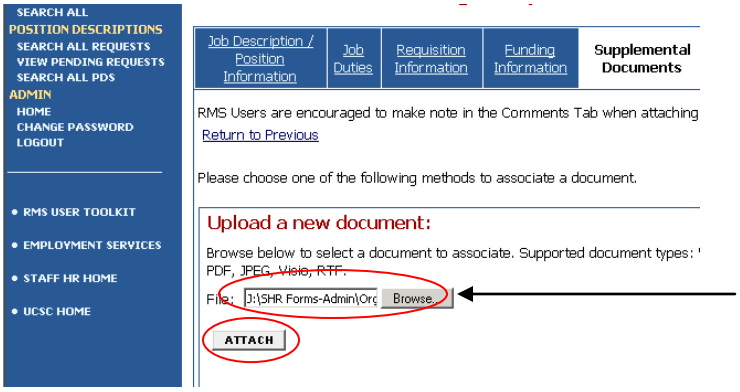
Note: there are two "Attach" buttons on this screen. Be sure to click the "Attach" button which corresponds to the method you choose (either "Upload a new document" or "Paste a new document").

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.



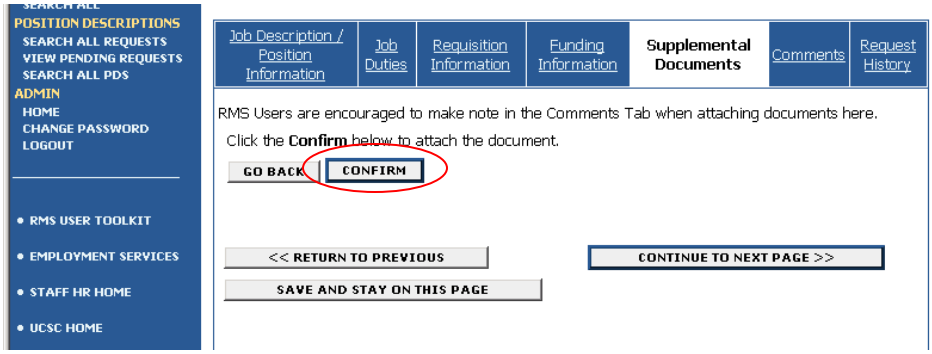




When you click the “Open” button the location path to the document will appear in the space next to the “Browse” button.

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.



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.

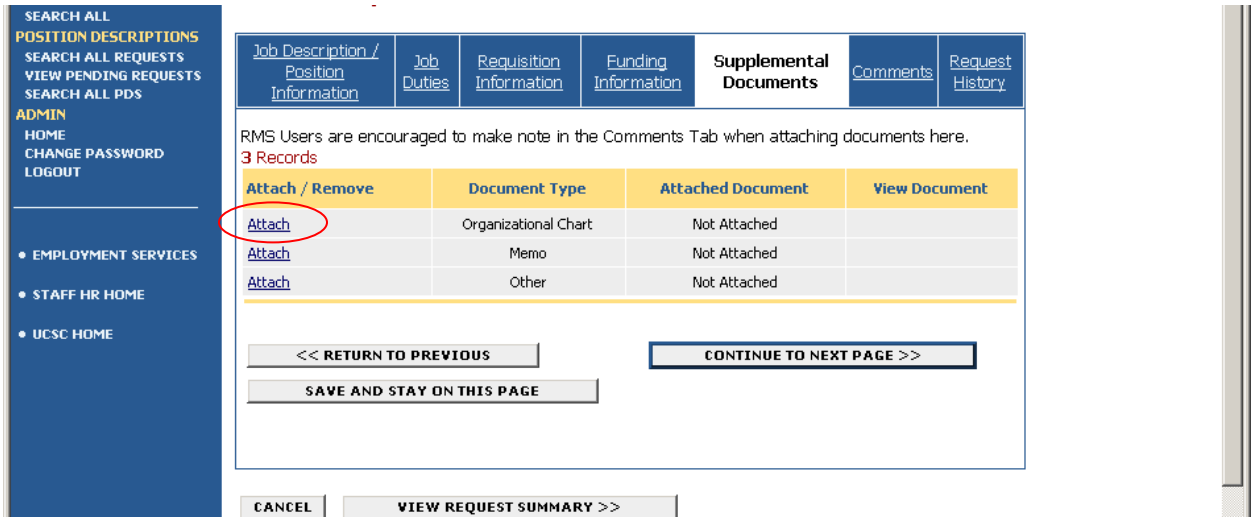
Click the “Continue to Next Page” button to go to the next tab.

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.

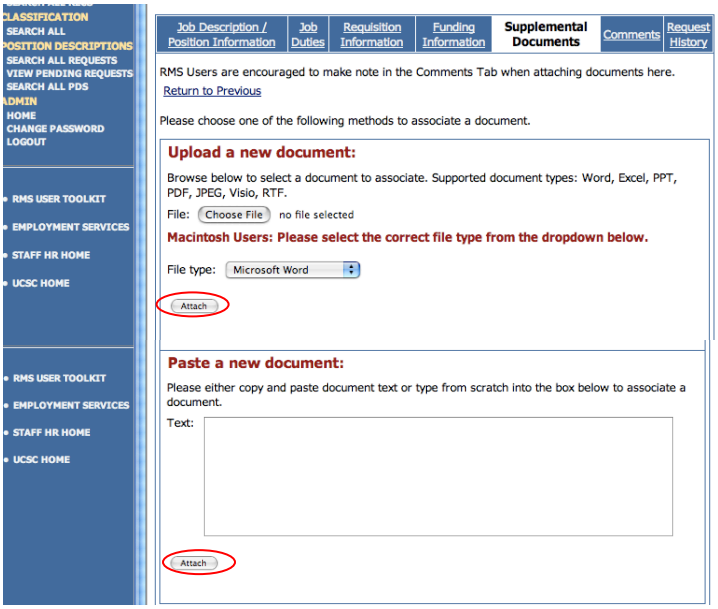
Attach a document by clicking the ‘Attach’ link on the same line as the document type you want to attach.



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

You will have 2 options for attaching a document:

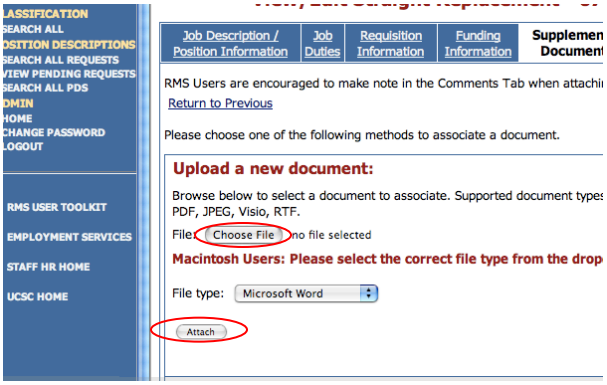
1. The “Upload a new document” method allows you to attach a document stored on your computer in one of the following common formats:
    a. Adobe Acrobat (.pdf)
    b. Microsoft Word, Excel (.doc, .xls)
2. The “Paste a new document” method allows you to attach a document that is of another format using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

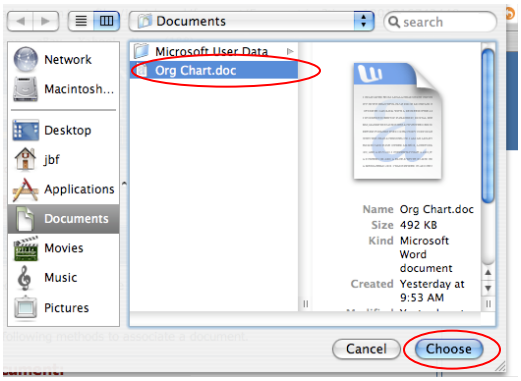


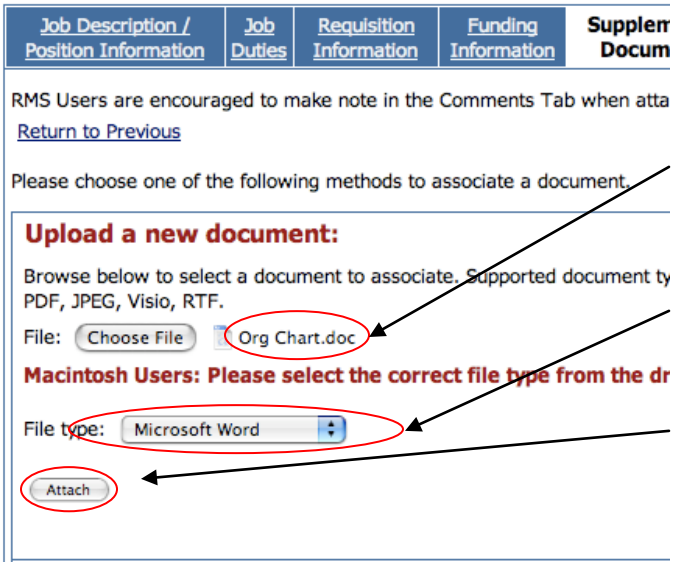
Note: there are two “Attach” buttons on this screen. Be sure to click the “Attach” button which corresponds to the method you choose (either “Upload a new document” or “Paste a new document”).

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.





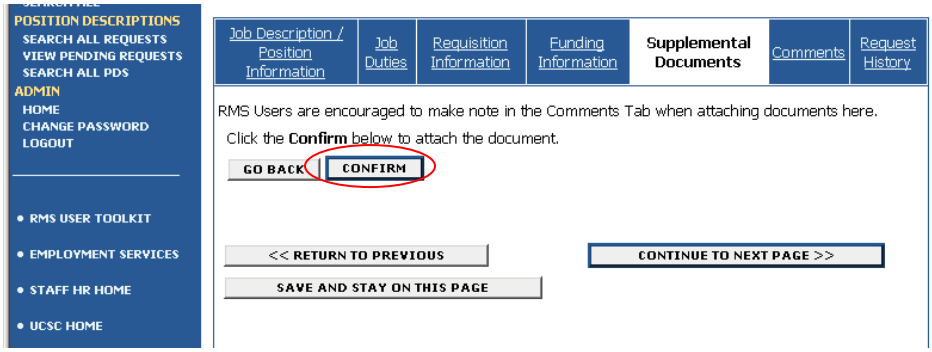


When you click the “Choose” button the name of the document will appear in the space next to the “Choose File” button.

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

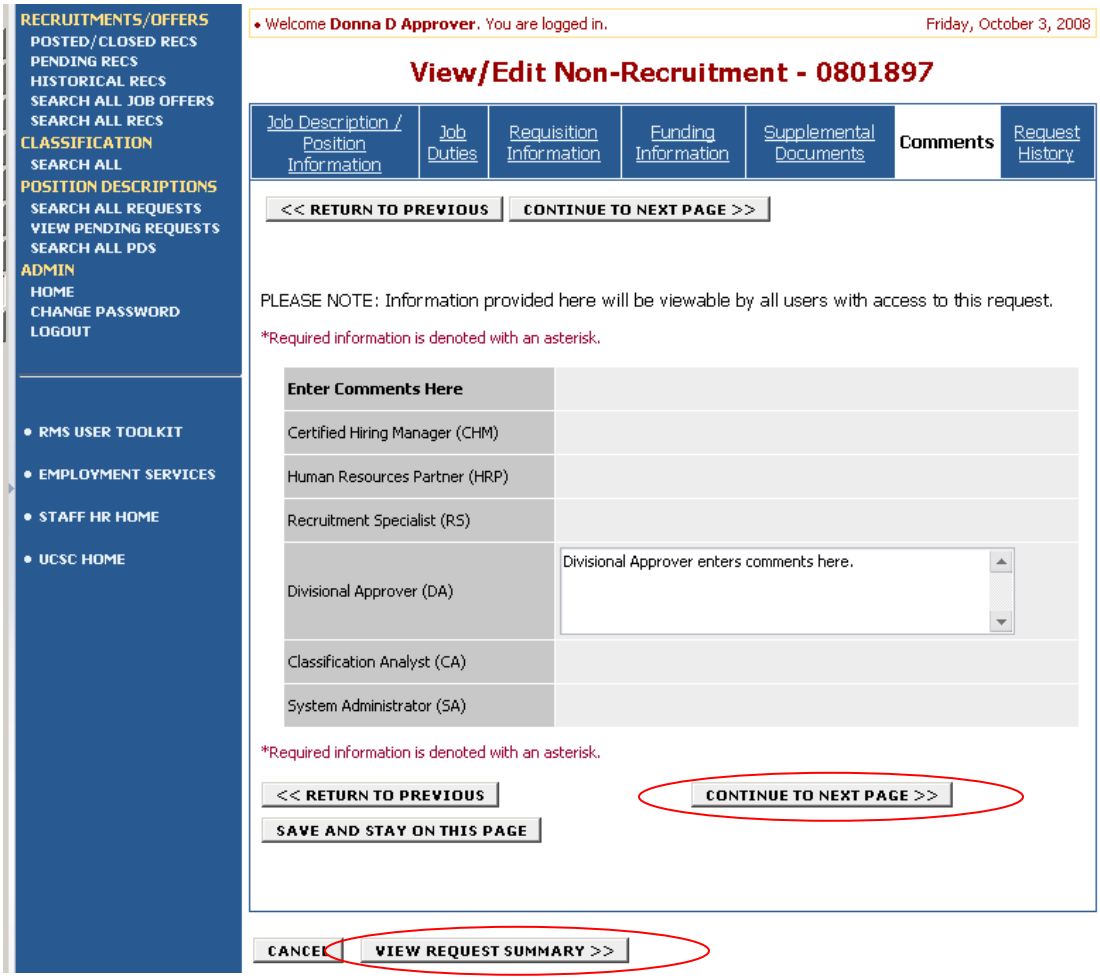
After clicking the “Confirm” button, you will see a screen similar to the one below. This screen gives you the option of viewing or removing the attached document(s) as needed.

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.



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.

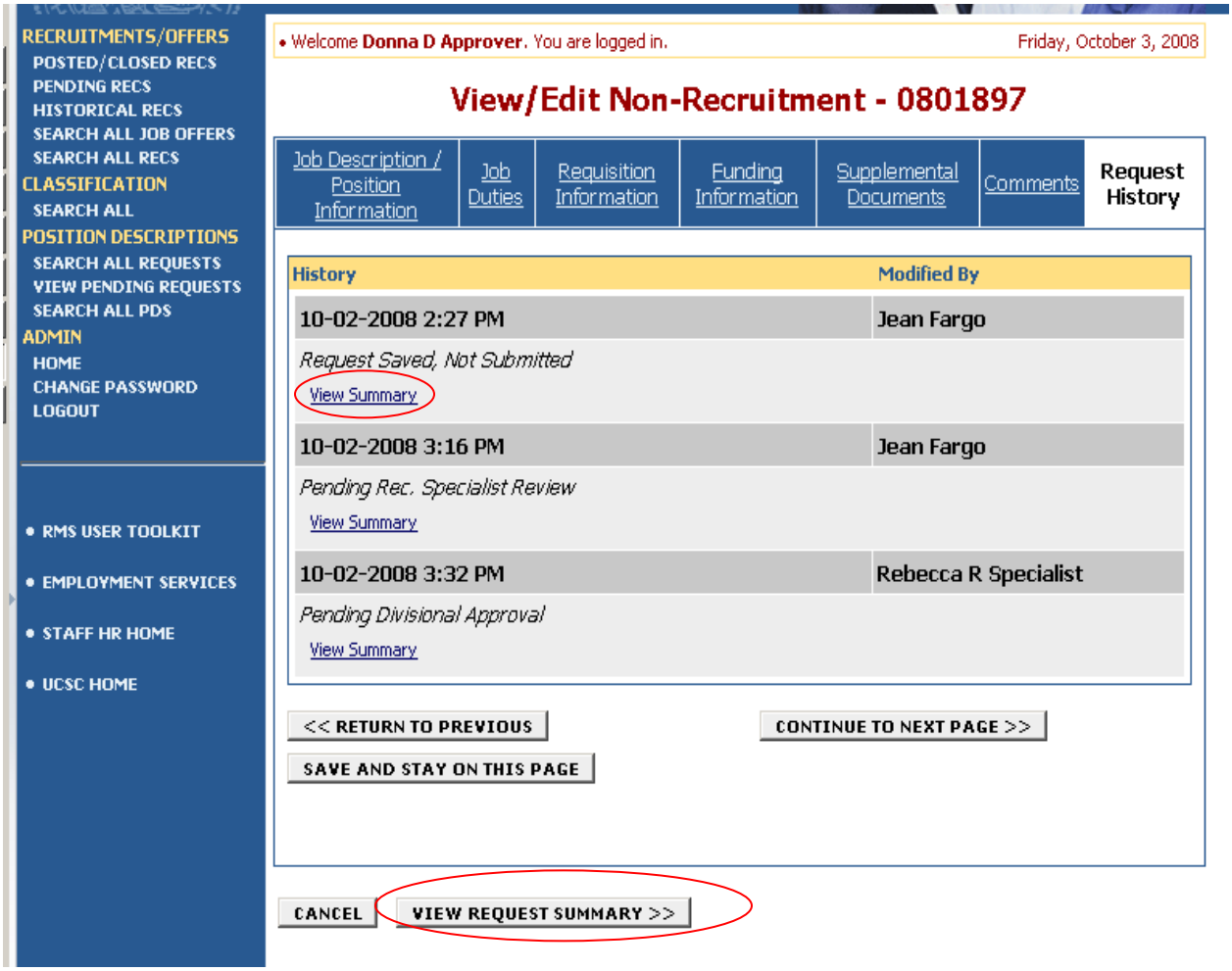
History Tab

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.



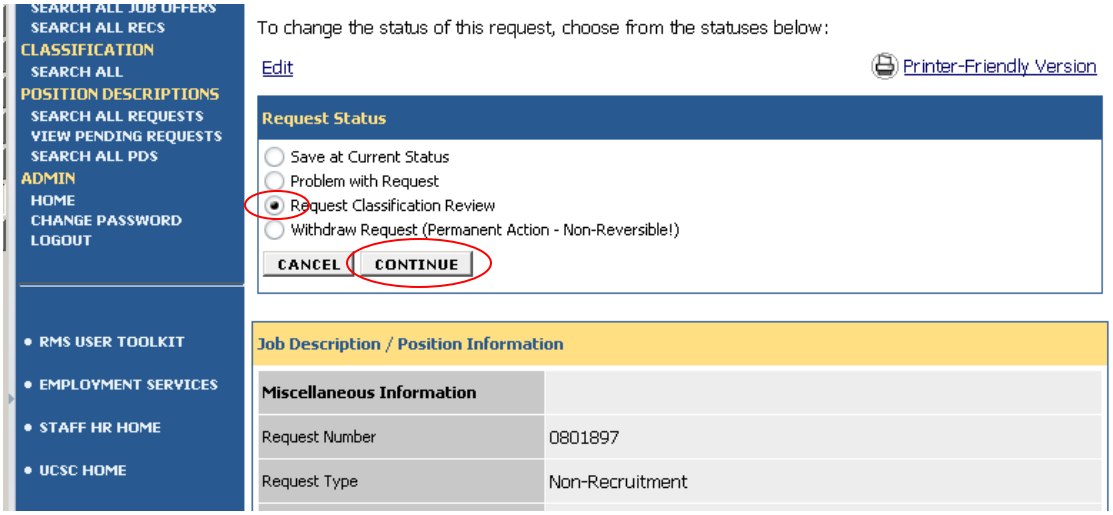
Approving the Request

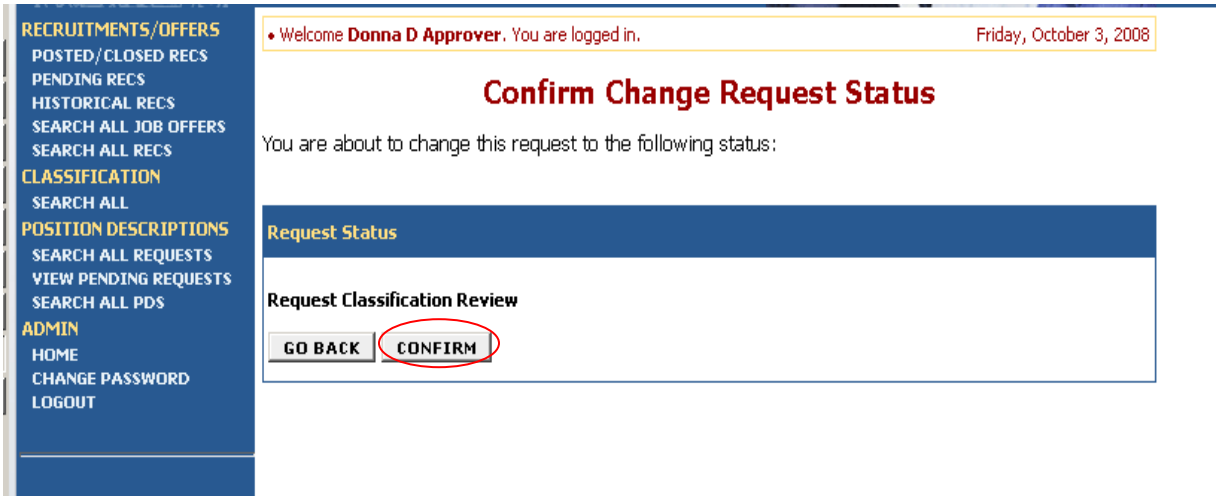
After clicking the "Continue To Next Page" or the "View Request Summary" button you will see a screen similar to the one below, the Request Status page.

- "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".





APPROVING A JOB OFFER

Searching for a Job Offer Request

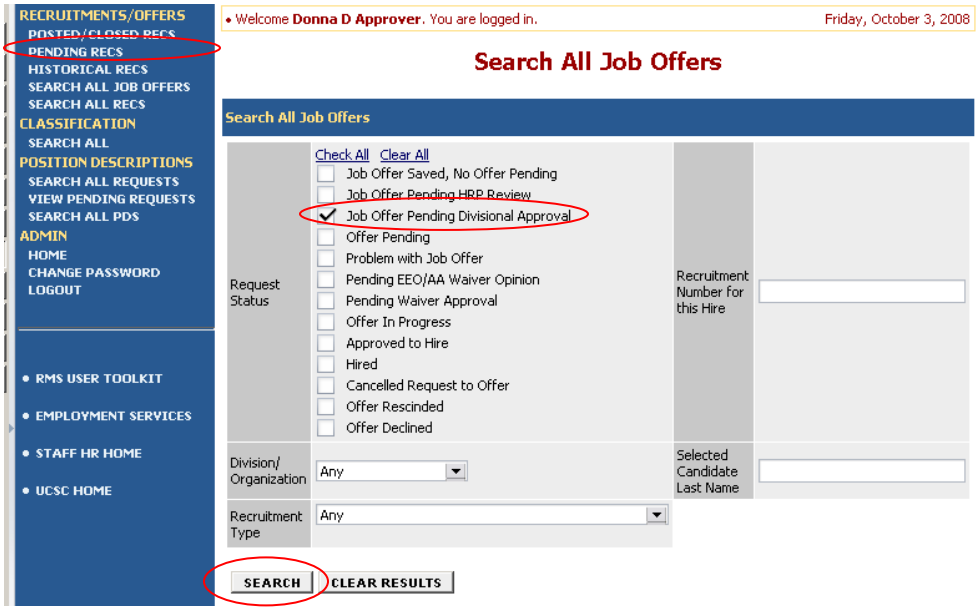
You will receive a system-generated email when a job offer request requires your approval.

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:

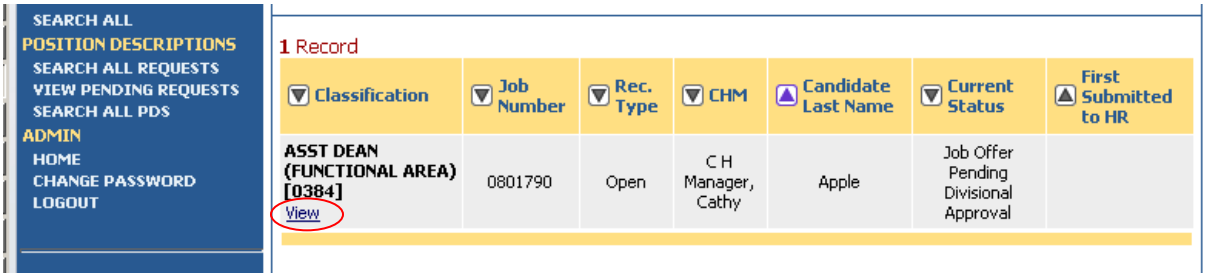
- Login to the system
- Under Recruitments/Offers in the left navigation bar click “Search All Job Offers”
- Check the Request Status box “Job Offer Pending Divisional Approval”
- Click “Search”

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.



Reviewing and Approving a Job Offer Request

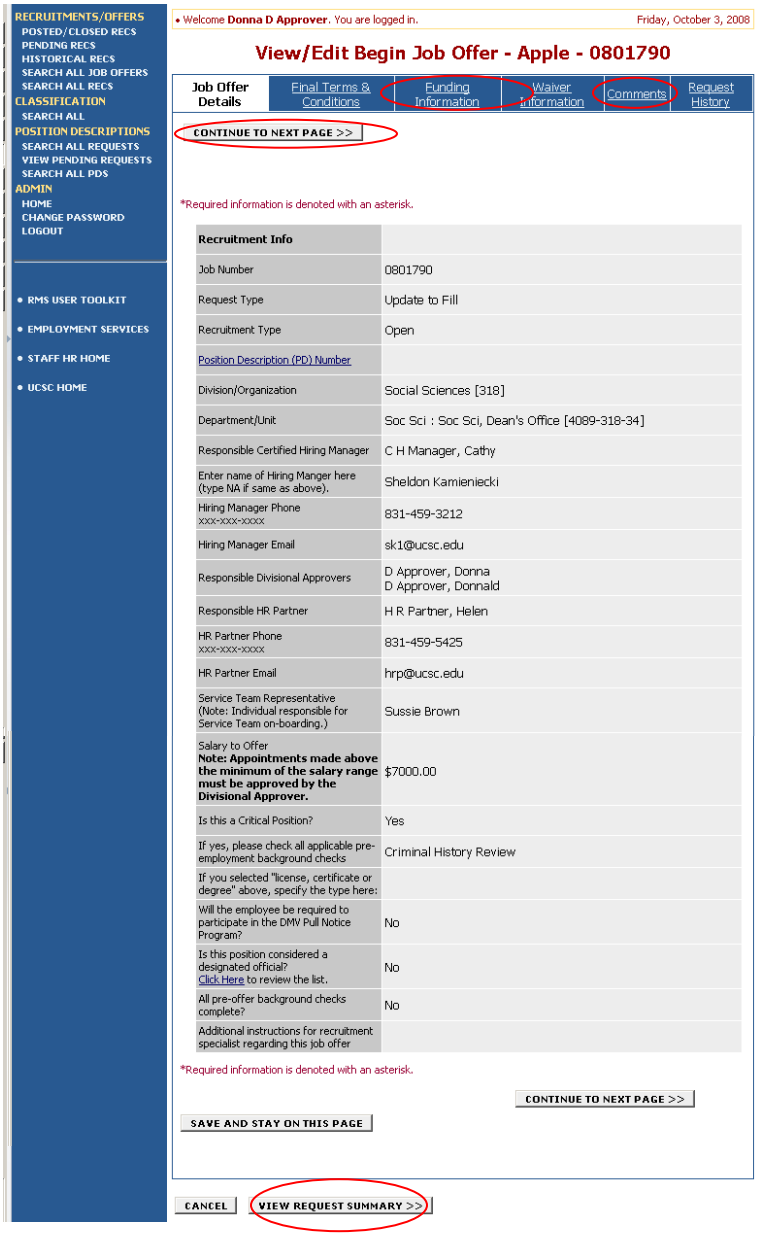
Review the information in the “Job Offers Details” tab. If any of the details are incorrect or missing, you will send the job offer request to your HRP for adjustments. Make careful notes in the “Comments” tab with instructions for your HRP.

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.



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.

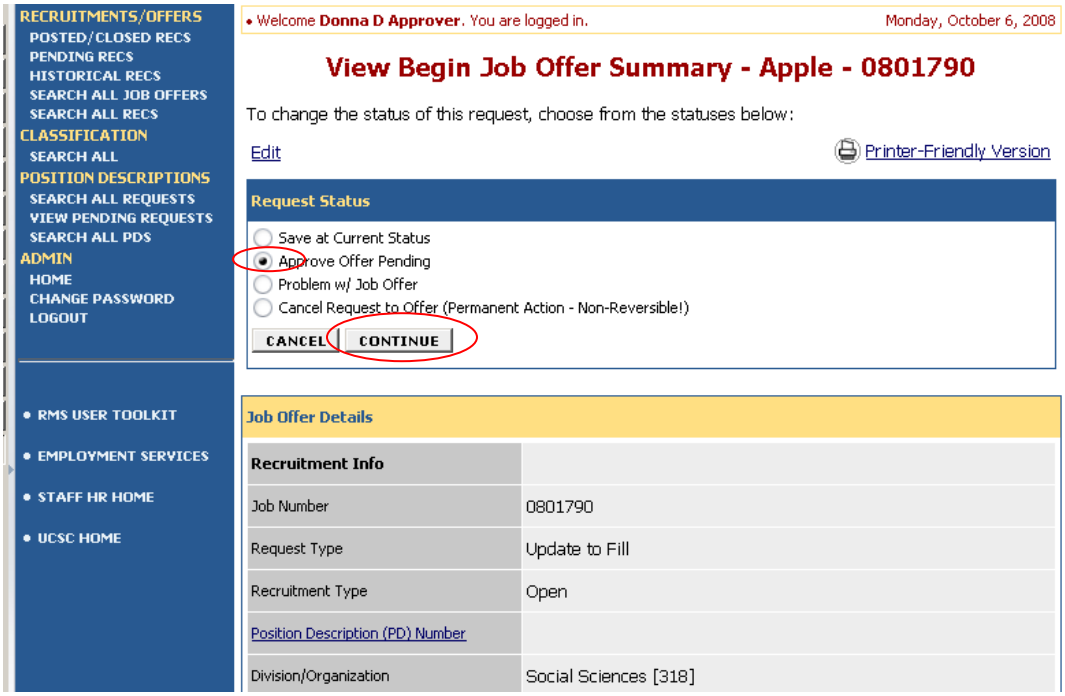
- "Save at Current Status" button will allow you to save your data and continue your work on the job offer request at a later time. The job offer request ***will not*** move forward in the work flow.
- "Approve Offer Pending" button ***will move the request forward*** in the workflow to a status of "Offer 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".

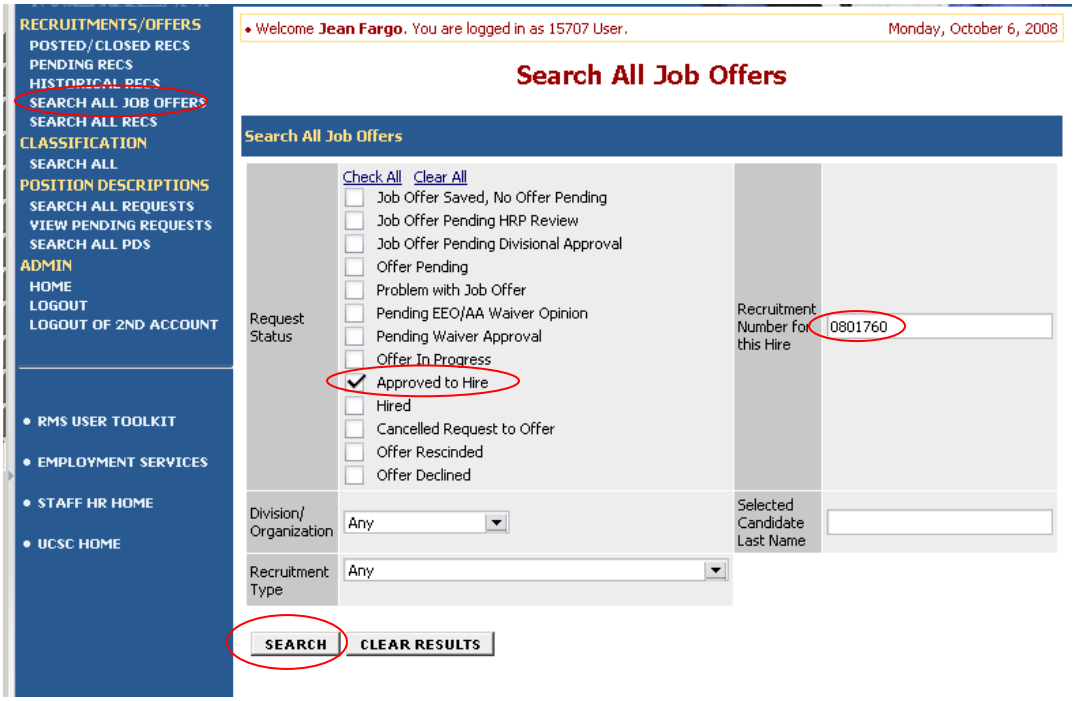
Note: Once you move a job offer request to a status of "Offer Pending", you will have view-only rights. If further divisional approval is required (e.g., salary negotiation), the job offer request will be sent back to you for subsequent approval and/or comments.



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”.



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

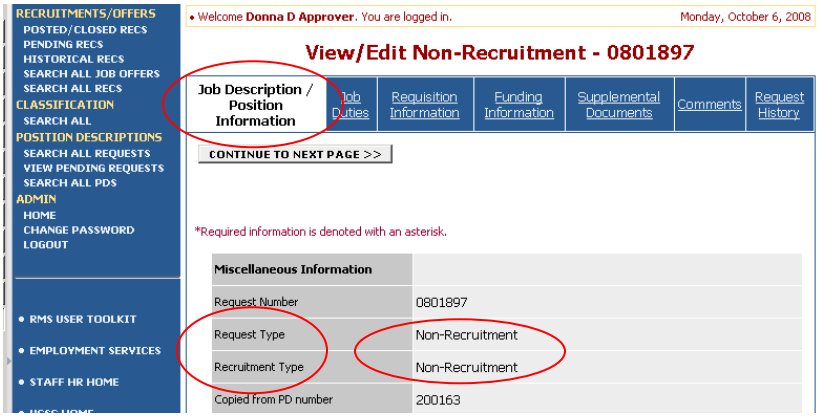
NON RECRUITMENT/WAIVER OF RECRUITMENT (NR/W) OVERVIEW

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.



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.

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

Quicklink

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, lhcastro@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/procedures/rms_toolkit/rms-email-list.pdf and is updated when new emails are added.

Email Recipient List

RMS Email Recipient List

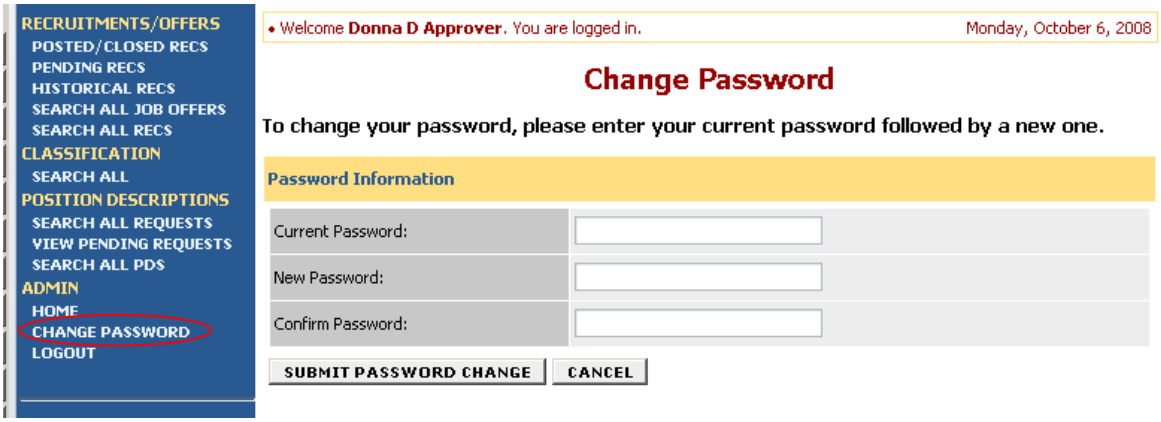
RMS Status	Recipent(s)	Email Subject Line
Pending Referral	Applicant	UCSC Employment Application/Job #:xxxxxxx
Withdrawn per Applicant Request	Applicant	UCSC Employment Application/Job #:xxxxxxx
Pending HRP Review	HRP	[RMS Job #:xxxxxxx] Request Pending HRP Review
Pending Rec. Specialist Review	RS	[RMS 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.



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