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SECTION 1: WHERE TO GET HELP (SUPPORT, ERRORS, TRAINING, POP-UP BLOCKER, PROCESS)

IMPORTANT: MAKE SURE THAT BEFORE YOU BEGIN TO CREATE YOUR REQUISITION OR DISPOSITION CANDIDATES, YOU TURN
OFF YOUR POP-UP BLOCKER. In Internet Explorer, you can following these instructions for turning on and off your pop-up

http://finweb.rit.edu/humanresources/recruitment/ includes links to additional instructions and quick start user guides.
Email staffrec@rit.edu or contact your Human Resources recruiter or Lizanne Zamites-Office of Staff Recruitment 475-6261

IF YOU ENCOUNTER AN ERROR WHEN YOU RECEIVE AN EMAIL NOTIFICATION FOR A
CANDIDATE FORM APPROVAL

If you encounter an error which states: “You do not have privileges for viewing this form”, please email staffrec@rit.edu. We
may have to temporarily add you to the req team or send you an electronic copy of the EAF to view so you can authorize a
proxy approval. We are working to resolve the privileges issue that some users have encountered with the forms.

SUPPORTED BROWSERS FOR MANAGER PORTAL

Kenexa supports its solutions on a variety of operating systems and web browsers. New browser
versions are also supported as indicated by a “*” symbol. For example, support for Internet Explorer 9+
would include Internet Explorer 10 or greater upon official release.

<table>
<thead>
<tr>
<th>Internet Explorer</th>
<th>Firefox</th>
<th>Safari</th>
<th>Chrome</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7-8</td>
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<tr>
<td>9+</td>
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<td>11+</td>
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<td>5+</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>18+</td>
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</tr>
</tbody>
</table>

2x BrassRing

Key: • Full feature support  . Candidate experience

1. Kenexa measures browser page load times and page performance under simulated load conditions to ensure reasonable response times; specific configurations and usage patterns may result in dramatically different response times.
2. Indicated browsers are supported on Windows XP/Vista/7 and Macintosh OS X 10.4/10.5 in alignment with the
   browser manufacturers’ supported operating systems. Operating system and browser patches must be current.
   Event Manager browser requirements are the same as for 2x BrassRing.
3. Web browsers should be configured to accept cookies, with browser security settings set to medium or lower.
4. 2x BrassRing is also supported on Firefox 9+ for Linux.

SECTION 2: USER TYPES

Faculty and staff who will be using the system to create requisitions or review applicants will be assigned one of two levels of
access in the Career Zone Manager Portal. Email staffrec@rit.edu if you need to have a different level of access than what you
were originally assigned. There is no longer control of view and update access by req.

• CZ Requisition and Applicant Management (assigned to all supervisors and individuals who need to create requisitions and
update applicant statuses)
CZ Applicant Management only (non-supervisors and individuals who do not need to create requisitions or update applicant statuses)

SECTION 3: NAVIGATION

YOUR PORTAL AND PANELS

As a hiring manager or part of a search team, you will see on your panels, applicants who you have a “MY” relationship with by either being the requisition creator, the hiring manager or on the search team. If an applicant applies to several of your openings, when you are reviewing your applicants, it is recommended that you filter the talent record to view only that req folder (see reviewing individual talent records below.)

1. The home page panels are the framed content areas that appear in your workspace (Portal).
2. Home page panels are adjustable by user so that you can see the home page with the information most important to you.
   - You can adjust the size or order of panels on the portal
   - You can minimize, maximize and close panels
   - You can adding and remove columns from panels (Display—Edit Columns)
   - You can access Quick Search
3. Only SINGLE CLICK when navigating through the system and avoid using the browser BACK button.
4. Each requisition will be assigned a unique requisition number in the format of 123BR

QUICK SEARCH: Quick Search allows you to search for reqs based on the complete or portion of a Job Title or req number or search for a candidate by last name or part of their last name. Click SEARCH in upper right corner of the home page. The Quick Search field will appear. Enter your search criteria in the box. Select “Search Candidates” or “Search Reqs”, then click:

When candidates have applied to a req via the talent gateway, they are considered “filed to the Req Folder”. If you search for your req number in the search box at the top of the page, you will be brought to this view. To view your applicants, click on the “Req Folder” icon.

VARIOUS ICONS AND LINKS

Home—Click to return to the Welcome Page that displayed when you logged into Career Zone (Kenexa 2xB Brassring or 2XB).
Logoff—Click to log out of Career Zone (Kenexa 2xB Brassring)
Search—Click here to “quick search” for candidates or requisitions that match specific criteria.
This convenient feature remains open for future login sessions unless you click to close it.
**TEXT AREA FIELDS:**

Certain fields within CareerZone are called “Text Area” fields and they contain editing tools. When you click in the box, the box will pop open and expand to show the editing tools.

The “Clear Formatting” box will revert all of your formatting to regular text and remove any HTML coding in the box. This is useful if you want to do all of your formatting consistently in each box...beware, it will also remove hyperlinks, so you will have to add them back in.

**SECTION 4: FACULTY AND STAFF REQUISITION CREATION**

**REQUISITION STATUSES**

**Pending** – Req is in the process of being approved.

**Approved** – Req has all necessary approvals; system updates from Pending --> Approved.

**Open** – Req available for recruiting; opening is a manual action; can be posted to Talent Gateways.
Closed - Req filled. From here, reqs can be Re-Opened by recruiters, restoring ability to change HR statuses assigned to candidates.

On Hold – Req needed to be temporarily put on hold; Suspends the number of days counted as Open.

Cancelled - No longer recruited for due to budget constraints, headcount changes, etc.


Requisition statuses can only be updated by recruiters via email by emailing staffrec@rit.edu for staff reqs and faculty@rit.edu for faculty reqs.

CREATING A FACULTY OR STAFF REQUISITION (REQ) FORM

1. Click `Reqs`
2. Click `Add new req`
3. Select your Req Template

4. When the req form pops up, complete the required fields including selecting your job code (the Job Code field is the Position Combination in Oracle).

5. Information related to the job code that you select will auto-populate several of the other req form fields (this is called Job Code Default Data (JCDD)).

6. Information that populates on the requisition from the Job Code should not be changed on the requisition without first following position control procedures to make the change first in Oracle.

   http://www.rit.edu/fa/humanresources/content/position-control-procedures

- Required fields are marked with a red asterisk *
- DO NOT CHANGE THE DATA IN THE DEFAULTED FIELDS (SUCH AS ORGANIZATION). You must go through standard position control procedures to make changes to Position/Org Data in Oracle.
- You can save as a draft at any time in the requisition creation process

STAFF REQUISITION SCREEN SHOTS

Select the option of Replacement if you already have a PC number for your requisition.

If you do not already have a Position Control Number (PC) because you are requesting new FTE you must first request a position control number to use in the Position Combination field of the requisition. Please complete the position setup form at: https://www.rit.edu/fa/humanresources/sites/rit.edu.fa.humanresources/files/forms/New_PC_Setup_Form.pdf

Once you have your PC number, you can start typing it or part of the position title in the job code field. The page will pause for a moment and certain default information will populate the form. Complete all required fields on the form.
If you have changes to the position title or organization, please select “YES” for the question that says: “Are there any changes required to the position title or organization prior to posting this job”. Once you save your requisition, an email will be sent to position control so they can make the required changes prior to final approval and posting.

Staff Job function will show up on the talent gateway as criteria that applicants can use to search for a job.

“Autocomplete” fields allow you to just start typing in order to get a list of options.

On the “Job Code” field, you can also click the filter icon to use additional filtering options.
There should only be one choice in the college/division approval and Requisition Type Flag fields. These are used for approval and must have a choice selected. Please leave the HRSM field as it defaults—it is for workflow purposes only.

The person selected in the Hiring Manager Field on the req template determines which approval hierarchy is populated.

The approval chain is pre-determined based on a combination of the supervisory and organizational hierarchy, as well as special rules which apply to certain colleges and divisions.

This post question is only to prompt recruiters to post this position to the external talent gateway (Career Zone).
**Requisition Team**

Requisition team – To add members to the req team, you can **start typing their name**. A list of people with like names will appear and you will be able to select them.

Your Requisition Team should include anyone who will need direct access to the applicant pool and forms in the Career Zone system for review or updating. By being on the team (or by being the hiring manager or requisition creator), you establish a “MY RELATIONSHIP” with the requisition. This means you can view individuals who apply to those reqs. **If you do not wish to add all individuals to your req team who need to review applicants, consult the eLink section of this manual. Elinking allows you to email candidate information to individuals to review candidate information and forms.**

Make sure you have added individuals on the Req team if they need to:

- Receive a notification when the job req is opened,
• Access the job req or applicants after it is created
• Assign Applicant HR statuses and Dispositions to applicants who are filed into the req folder (to update status, team member must also have full Requisition and Applicant Management Access. Contact staffrec@rit.edu if someone’s access needs to be changed.)

**DAILY NOTIFICATIONS FOR NEW APPLICANTS --AUTOFILER**

Turn off Autofiler notification for this req—If you would like members of your requisition team to be notified (each night) when new applicants apply to the req, then LEAVE THE BOX UNCHECKED. If you prefer that notifications are not sent, then check the box to turn off notifications. Only the REQUISITION TEAM will receive these notices—Hiring Manager and Creator must be added to the req team if they are to receive the notices.

**HOW TO UPDATE YOUR REQ TEAM AFTER REQ HAS BEEN SENT FOR APPROVAL**

• Search for your requisition number in the Search box at the top of the screen (if the box is not visible, click the blue Search link.)

• The Req Search Results box will appear

• Click on the box next to your req name, then click the UPDATE MULTIPLE REQS link on the left

• Click on the LIST button next to the “Select to Add to Requisition Team” box
• Clear the box at the top which says “Select(3)” and enter in the last name of the person you wish to add. Click SEARCH.

• Click on the name in the box on the left to move to the box on the right. Then click OK.

• Click the circle that says “OVERWRITE EXISTING”, then SAVE.

• You will then receive a message that says “All Requisitions updated successfully”

• You can verify by clicking on the requisition number and viewing the req.
## Faculty Requisition-Specific Fields

You will see several different fields on the faculty requisition form than you see on the staff requisition form.

In addition to the standard fields, the faculty requisition also includes these Do Not Post fields which will replace questions regarding the position that are currently captured on the Faculty Search Waiver Form. The Faculty Pre-Offer Approval Form has also been modified in the new system to provide questions regarding the waived hire. There will no longer be a need to complete the separate Faculty Search Waiver Form as long as the Req and Pre-Offer Approval Form are completed.

Please complete the following four questions only if the requisition will NOT be posted. These questions along with the Faculty Pre-Offer Summary Form will replace the previously used Faculty Search Waiver Request Form.

<table>
<thead>
<tr>
<th>Do Not Post Reason</th>
<th>This is a single select field that provides the following options for why a search is not being conducted. Waivers are used as an exception, it is best practice to search when possible.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Additional do Not Post Comments and name of person to be hired</td>
<td>If you know who will be hired, please provide the name and some reasoning why. Ex. A current adjunct will fill an emergency visiting assistant professor opening.</td>
</tr>
<tr>
<td>Do you Intend to Search this Position in the next Academic Year?</td>
<td>Please provide information on why this Position is being waived. Ex. Current professor holding position is on a sabbatical leave for one year. A one-year visiting professor will be hired to cover classes during professor x’s absence.</td>
</tr>
<tr>
<td>Search Waiver Rationale Statement</td>
<td></td>
</tr>
</tbody>
</table>

### Faculty Specific Rank and Discipline Information

#### Faculty Information

**Faculty Type (Posting)**

These are the possible tenure options for the position that will show on the posting site. You can select more than one if needed (multi-select (hold the ctrl key and click to select multiple)):

- Non-Tenure-Track Lecturer
- Non-Tenure-Track Research
- Non-Tenure-Track Visiting
- Tenure-Track
- Tenured

**Faculty Rank (Posting)**

These are the possible ranks for the position that will show on the posting site. You can select more than one if needed (multi-select (hold the ctrl key and click to select multiple)):

- Lecturer
- Instructor
- Assistant Professor
- Associate Professor
- Professor

**Faculty Discipline**

Selecting the FACULTY DISCIPLINE will allow more detailed searching and reporting opportunities for candidates and RIT. This is a multi-select field, therefore select as many options as appropriate for the search. The specific options that appear are tied to the selected Organization in the req.
Anticipated Start Date
This will be used in postings and advertisements. Tip faculty positions that begin in the fall quarter usually begin around Aug 20th 23rd.

Information to be submitted for use by advertising agency (Job Elephant) – these fields allow all faculty positions to be sent to our ad agency Job Elephant via a nightly feed to begin the advertising process.

Job Aggregator/Ad Agency (Job Elephant)
Do you want to Post to Job Aggregator/Ad Agency?
This will initiate Job Elephant to post your position to the standard sites and make recommendations on additional ads that you might like to purchase.

Job Aggregator/Ad Agency Notes (Include Search Committee Contact Name and Email to Receive Agency Recommendations)
You need to provide your Search Committee chair (or college rep. that handles advertising) while completing the requisition since this field will feed to the ad agency, Job Elephant. This will allow the ad agency to know who to contact to provide recommendations for additional paid advertisement and who to work with to get them posted.

Information in the National Availability Data is used for comparing diversity efforts with what is available and the applicant pool results. This information also auto-fills various other forms in the system (such as the Faculty Recruitment Plan forms and Pre-Offer Approval form). A hyperlink to NSF is provided or the department can use other more relevant discipline-specific figures provided through their national organizations.

National Availability Data
Indicate the National Availability Data for Minorities and Females from either the NSF Survey of Doctorates or another pertinent discipline-specific source. This data will auto populate into a number of faculty forms for this search/requisition.

| % of Minority | Provide the % of minority (AALANA) population that is estimated to be available to apply for this position. Ex. % of this population that has recently completed a PhD and/or postdoc |
| % of Females | Provide the % of population for male vs female that is estimated to be available to apply for this position. Ex. % of this population that has recently completed a PhD and/or postdoc |

Source of National Availability Data
What source reported this data

The Interview Builder functionality is being piloted by select departments and colleges on campus. If you are not part of this pilot group, you can disregard this section.

Interview Builder (applicant screening phases)

Screen Application Materials

Phone Interview
009719-00-00 - PC9719 Phone Interview Template cb - CB 6.7.2012

Onsite Interview
009719-00-00 - PC9719 Phone Interview Template cb - CB 6.7.2012

Conference Interview

If a template has been created for your position control number (job code) then you will see an Interview Template available. The template will allow you to ‘Create new interview from template’ for the specific job code.
One unique interview can and should be selected in the req for each applicable applicant screening phase listed above.

Submitting your Requisition and requisition edits

Once you have completed all your requisition fields, you can select SAVE or Save as draft. If you select SAVE, the START WORKFLOW BOX will appear.

Once you select “SAVE”, edits can no longer be made by the requisition creator to that req (EXCEPT FOR ADDING INDIVIDUALS TO YOUR REQ TEAM AS EXPLAINED previously).

If you feel you will need to go back and make additional changes to your req before routing for approval, you should SAVE AS DRAFT. Changes and Edits to reqs after clicking save and continue need to be requested by sending an email to STAFFREC@rit.edu.

SAVE AS DRAFT function tips:

• Requisitions can be saved as draft at any point in the requisition creation process.
• Requisition Drafts can be accessed by going to “REQS—View my DRAFTS”
• To be able to save as draft, you much first have the job code field completed
• You cannot eLink a draft req to be completed by another individual

Submitting your requisition for approval

Also see section in the back of the manual called “Approvers in Career Zone”

1. Once you are ready to start the approval process, Click SAVE. This will launch the “Smart Approval” process.
   a. If you accidentally close out of the smart approval box prior to sending your requisition for approval, you can locate your requisition again in your Pending Requisitions list (My Reqs Pending Panel on your Portal). If your requisition does not show up, you may need to refresh your screen.
   b. Click on the Req Number, then click on the Box that says: VIEW APPROVALS
   c. If the workflow has not already started, you can insert additional approvers as needed, then click the box that says “START WORKFLOW”.

2. The Smart Approval screen will appear with your list of approvers.
3. **Additional approvers can be added to the list, but no approvers can be removed.** If you prefer, you can always add yourself as the first approver to any req. This will allow you to view the printable view of the req which lists all the approvers.

4. Once you have all your approvers in place, click the Start Workflow Button.
   a. Your approvers will receive email notifications when it is their time to approve. The emails come from workflowmanager@trm.brassing.com

5. If a requisition is declined by one of your approvers (similar to the “RETURN FOR CORRECTION” option in iRecruitment), you must start over by creating a new req to submit again; **but this is made easy by the SAVE AS NEW function which allows you to copy the declined req, make edits and resubmit for approval.**

The full APPROVERS GUIDE is available at: https://finweb.rit.edu/humanresources/recruitment/manager_resources/approversguide.pdf

**Viewing Your Requisition Approval Progress (for reqs where you are the hiring manager, creator or on the team.)**

1. Return to your manager portal by clicking the HOME link at the time of the screen and find your Panel called “My Reqs Pending Approval”.
2. **Find** your req in the panel grid.
3. The next approver will be listed in one of the columns on the panel.
   a. **If you are one of the pending approvers, you will see a checkmark in the column called “Approve”**
4. To view your remaining approvers, click on the req number, and then click on the box that says “View Approvals” on the side of the screen.

   a. On this screen, you can view your approval progress and any approval comments. Anyone in the approval chain can also ADD ADDITIONAL approvers at any point in the process.
POSTING TO THE TALENT GATEWAYS

After the final approver, which is the Staff or Faculty Recruiter, the recruiter will MANUALLY post the req (OPEN the req) on the talent gateways. *Note that there may be a delay between final approval and appearance on the Talent Gateways.*

LOCATING A REQUISITION THAT YOU NEED TO APPROVE

1. You should receive an email notification when you are an approver of a requisition, however, if you misplace your email, you can still locate the requisition.
2. Go to REQS-SMART APPROVAL
3. When the Smart Approval box appears, click on the Approvals tab (this should appear by default)
4. Select your active Task and click GO.
5. You can approve from this page, or insert additional approvers in the process.

DECLINING A REQUISITION

When a requisition is declined, it means it has been rejected by one of the approvers. You can locate your declined requisitions by going to Reqs—View my Reqs—Declined. You will also receive an email notification when the requisition has been declined.

HINT FOR APPROVERS: Put minor changes that need to be made into the notes section so the recruiter can fix prior to posting the req, rather than declining the entire req.

SAVE REQ AS NEW (COPY REQUISITION)

1. To copy a requisition (from any status): Simply select your req (either by searching for it or locating it in a panel) and click the SAVE REQ AS NEW option. Please enter either Daniel Downie for Faculty or Lizanne Zamites for Staff as the first approver on your requisition, so they can update the budget information that may have changed since the last time you processed the req. At this time, there is an issue where the budget is not updating for requisitions which are copied using “save req as new”.
2. Select the appropriate job code if the job code is not correct and click anywhere outside the job code box to refresh the screen.
3. Make any changes, submit and start workflow again.
4. If you SAVE AS NEW, you will receive a new “BR” number.
5. Requisitions can be “SAVED AS NEW” from any Requisition Status. This is useful functionality if you create requisitions with similar information over and over again. If you are in a panel, simply select the req, then go to Actions—Save as New.

HELPFUL HINT: If you are a requisition approver, rather than DECLINING a requisition for minor changes, which will cause a new BR number to have to be created, you can enter your changes in the approval comments and the recruiters can make the changes prior to posting on the talent gateways.

INCREMENTAL REQUISITIONS

As of the JANUARY 6, 2014, incremental requisitions will be entered online. To do so, you must first request a position control by completing the following form: [https://www.rit.edu/fa/humanresources/sites/rit.edu.fa.humanresources/files/forms/New_PC_Setup_Form.pdf](https://www.rit.edu/fa/humanresources/sites/rit.edu.fa.humanresources/files/forms/New_PC_Setup_Form.pdf). Once you have your new position control number (which will has an “IN” funding type until fully approved) you should enter the requisition directly into the Career Zone system like you would do with any other requisition.
Faculty Requisition Subsidiary Forms

If required by the Office of Faculty Recruitment, you can complete several Requisition Subsidiary Forms AFTER the requisition is approved. These forms are accessed by navigating to your “MY OPEN REQS” panel and clicking the req you in to work. Then select the FORMS TAB at the top of the page.

****PLEASE CONTACT THE OFFICE OF FACULTY RECRUITMENT IF YOU NEED ASSISTANCE WITH THESE FORMS****

These forms will appear in a dropdown list at the top of the screen.

- Fac. Recruitment Plan-OFR Referral
- Faculty Recruitment Plan-Ads
- Faculty Recruitment Plan-Outreach
- Search Committee Member Composition
- Mid Search List Certification Form (to be initiated by OFRR, NOT the department)

The first four forms listed were previously captured on the Faculty Recruitment Plan Form and need to be completed before the Mid Search Review Meeting takes place.

The Mid Search List Certification form is going to be initially piloted and its use will be further determined. This Mid Search List Certification form will be initiated by Office of Faculty Recruitment and Retention (OFRR) and then sent for approvals in order to record the deans’ approval for the committee to proceed with interviewing.

**Fac. Recruitment Plan-OFR Referral**- This form replaces the previously used page 3 of the Fac. Rec. Plan Form. The selected search committee rep, SC chair or staff assistant should complete this form prior. This is a form that the captures the actions that the search committee took on the referral names that OFRR provided as a result of mining their diversity databases.

**Faculty Recruitment Plan-Ads**- This form replaces section 5a or page 2 of the previously used Faculty Rec Plan form. This provides an opportunity for the search committee to list the paid ads that were purchased to recruit for this position. You do not need to include the standard sites/annual contracts that Job Elephant posts to.

**Faculty Recruitment Plan-Outreach**- This form replaces section 5b or page 2 of the previously used Faculty Rec Plan form. This provides an opportunity for the search committee to list the prospects or organizations that were used to help outreach/solicit applicants for the position. Provide the name of the person or org, date communicated, method(s) of communication, and results of outreach. This form currently has a spot for 10 blanks. If the committee has done a greater amount of outreach than 10, they can attach a list documenting the full list on the requisition ‘Attachment’ tab.

**Search Committee Member Composition**- This form replaces section 1 or page 1 of the previously used Faculty Rec Plan form. The search committee members should be identified along with their determined role of chair, member, evaluator or advisor. There is an opportunity to provide a date that the committee member last went through the required multicultural competency training.
Select the applicable form that you want to create and click the ‘Add Form’ button.

As you can see in the grid, the date and person that completes these forms are viewable along with the last edit made. These forms can be edited if needed, but there will not be a record showing the changes. They should be created once and considered ready for review just prior to the mid search review meeting. If suggestions to add to or edit the form(s) are made at the mid search meeting, then the forms should be edited.

HOW TO VIEW POSTING DATES AND POSTING PREVIEWS

1. Locate your requisition in the “MY OPEN REQS” panel and click on the requisition number hyperlink.
2. Click on the Posting Preview link on the side of the requisition.

3. The posting dates will appear in the window that pops up. The removal data is the last date the job will appear on the talent gateways.
4. If you want to see the Job posting preview, you can click on the magnifying glass.
5. If you want to send a copy of the job posting preview to someone, you can select the posting line(s) and click on the Send eLink Button—another dialog box will appear so you can select the individuals you want to send the posting preview to.
6. A posted req will have a posting removal date that is in the future.

You can choose to send an elink of the job posting preview by selecting the posting(s) and clicking the “Send eLink” button.

ADVERTISING STANDARD SITES AT NO CHARGE:

The standard sites that your job will be posted to (AT NO CHARGE TO YOUR DEPARTMENT) are:

- www.higheredjobs.com
- www.unyherc.org (Upstate NY Higher Education Recruitment Consortium)
- tweetmyjobs.com
SECTION 5: CANDIDATE TALENT GATEWAYS (HTTP://CAREERS.RIT.EDU)

The final approver in the requisition approval process will be the Recruiter. The Recruiter has the ability to open and post the req to the applicant talent gateways. Additional assistance for applicants, as well as a link to the full applicant user guide is available at: https://www.rit.edu/fa/humanresources/content/career-zone-applicant-assistance

All three talent gateways can be accessed by going to http://careers.rit.edu and they are:

- **Faculty/Staff Internal**: for RIT employees -- this replaces the RIT Employee Candidate access from Oracle. (Will use single sign on -- RIT Computer Account.)
- **Faculty External**: for external candidates to apply to faculty positions
- **Staff External**: for external candidates to apply to staff positions

RIT EMPLOYEE APPLICANTS WILL USE THEIR RIT COMPUTER ACCOUNT TO LOG IN TO THE FACULTY/STAFF INTERNAL GATEWAY AT HTTP://CAREERS.RIT.EDU

GATEWAY QUESTIONS:

Gateway Questions are groups of questions that are asked of all candidates regardless of the position for which they are applying (ex: Are you legally eligible to work in the US?, At any time in the future, will you require RIT’s assistance in securing your ability to continue to work in the US?)

Applicants are asked to provide information that can assist in the initial assessment of qualifications and that will appear on an outputable grid such as: most relevant degree, major or area of study of degree, grad year, Years of relevant experience

AFTER A CANDIDATE APPLIES TO A REQ VIA THE TALENT GATEWAY, THEIR TALENT RECORD IS NOT SEARCHABLE FOR UP TO TWO HOURS. DURING THE PERIOD WHEN CANDIDATES ARE NOT SEARCHABLE, THEY CAN BE FOUND DIRECTLY ON THE REQ FOR WHICH THEY HAVE APPLIED. CANDIDATES WHO ARE APPLYING AS A RETURN APPLICANT WILL BE SEARCHABLE WITH NO WAIT PERIOD

STAFF EXTERNAL TALENT GATEWAY-SEARCH FIELDS
Search openings

You may use any or all of the search criteria below to identify the career opportunity you are looking for and then click Search. To select or deselect multiple items in a list, hold down the CTRL key on a PC or a MAC. Use the SHIFT key while you click.

**Faculty/Staff Internal Talent Gateway**

**Faculty External Talent Gateway—Search Fields**
APPLICANT EXPERIENCE

When applying for a selected position, candidates will be walked through steps to answer questions and upload documents. There is a navigation bar at the top of the application screen that guides candidates through the process.

APPLICANTS WILL NOT BE ABLE TO MAKE CHANGES TO THEIR APPLICATION ONCE IT IS SUBMITTED.

Applicants have an ability to upload a specific resume and cover letter for each job they are applying for.

When applicants upload their resume the information will automatically parse out to create their profile. Applicants will have an opportunity to review and update the parsed information related to work experience and education.
ATTACHMENTS:
Applicants are able to attach up to 15 documents that are up to 5mb in size each. There is now a larger variety of file types that can be uploaded.

ADVERTISING SOURCE
Candidates are asked to select how they heard about the job.

EEO DATA
The EEO data has been updated to be in compliance with new regulations with an updated EEO/AA statement and the new ethnicity and race classifications.

NOTE: Applicants receive an email when they apply for a job acknowledging that their application has been received.
UPLOADING ATTACHMENTS NOT PROVIDED IN THE INITIAL APPLICANT SUBMISSION:

Because this system is OFCCP compliant, the applicant is not able to upload additional documents or update their application for a particular opening after submission. Applicants are strongly encouraged to save the application as a draft until it is complete. They have the ability to preview their entire application, including all of their attachments, prior to submission.

If an applicant forgets to load certain documents and you would like them to send them to you directly, you can:

- use one of the email templates in the Communications Section (such as “APPLICANT MISSING DOCS--SEARCH TEAM USE” to request the documents
- Once you receive them from the applicant, you can add them to the applicant’s talent record for the job by using the following procedure:
  - Search for your requisition
  - Either click on the “req folder” or the hyperlinked number of applicants in the “My open reqs” panel
  - Locate the applicant, click on their name and click on the ATTACHMENTS: Add/View link on the top of their Talent record
  - Click on the button that says “upload new attachment”
  - Browse for the file
  - Assign a category and click the UPLOAD button

SECTION 6: APPLICANT MANAGEMENT

REVIEWING AND SCREENING YOUR CANDIDATES

1. Users can also access the candidates that have applied to their req by navigating to your MY OPEN REQS panel which should be visible on your portable, then click on the hyperlinked number in either the “ACTIVE” column or the “TOTAL” column to view your list of applicants.

2. This will take you to the Candidate Output Fields on the Candidate Results Panel

The “Candidate Results” panel shows the candidates that are filed to a req folder. Some basic information is shown by default.

HELPFUL TIP! CUSTOMIZING YOUR CANDIDATE RESULTS PANEL

By customizing your panel, some of your basic applicant review can be done directly from the candidate grid...which is also SORTABLE and EXPORTABLE to Excel (Select your candidates then go to Actions—Export to Excel.)
Individual Candidate EEO Data is also visible on the Candidate Results Panel by Scrolling to the right.

Users can do the following **while in the candidate results panel**.

<table>
<thead>
<tr>
<th>Add and remove columns to show the information most important to you (Actions—Edit Column)</th>
<th>Access individual candidate talent records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resize, re-order and sort columns</td>
<td>Update HR (Applicant) Statuses (DISPOSITION YOUR CANDIDATES)</td>
</tr>
<tr>
<td>Create a default sort order</td>
<td>Export the information in the grid for review, reporting and printing in Excel</td>
</tr>
</tbody>
</table>

See Section on Updating Applicant Statuses and Dispositioning Later in this document
**Viewing Applicant Pool Diversity (EEO Data)**

Click on the number in the EEO Summary column to view a snapshot of your applicant pool diversity.

```
<table>
<thead>
<tr>
<th>Requisition</th>
<th>Position Title</th>
<th>Position Con</th>
<th>Active</th>
<th>Total</th>
<th>Date</th>
<th>Organization</th>
<th>Forms</th>
<th>EEO Sum</th>
</tr>
</thead>
<tbody>
<tr>
<td>270BR</td>
<td>TESTING ONLY HR Assistant</td>
<td>001087</td>
<td>4</td>
<td>4</td>
<td>30-Nov-2012</td>
<td>Human Resources</td>
<td>+</td>
<td>4</td>
</tr>
</tbody>
</table>
```

This will open a panel which shows a grid of your applicant pool by EEO category.

**Viewing Individual Talent Records, EEO (Diversity) Data, Resumes and Documents**

1. The talent record is a detailed snapshot of the candidate’s contact info, resume, cover letter, experience, education, attachments and action log. To access the Talent Record, click on a candidate name in the Candidate Results Grid.

2. You will see information for the candidate related to all reqs to which the candidate applied AND for which you have a “MY” relationship (Hiring Manager, Req Creator, or Req Team member).

3. Click on the blue “attachments” hyperlink at the top of the page to view or upload applicant Attachments or click on the “forms” link to add or view applicant forms to view the GQ Job Responses (which show the applicants’ responses to the online application questions.)
As of January 6, 2014, you can also view individual applicant EEO data by clicking the EEO and Veteran’s data form link or by viewing the data in various columns of the candidate results panel.

Please read the following regarding use of the EEO Data:

I UNDERSTAND THAT DIVERSITY DATA THAT I REVIEW IN THE CAREER ZONE SYSTEM IS FOR INFORMATIONAL USE ONLY. BY ACCESSING THIS INFORMATION, I ACKNOWLEDGE AND UNDERSTAND THAT THIS DIVERSITY DATA SHALL NOT BE CONSIDERED IN THE HIRING PROCESS.

RIT does not discriminate. RIT promotes and values diversity, pluralism and inclusion in the work place. RIT provides equal opportunity to all qualified individuals and does not discriminate on the basis of race, color, creed, age, marital status, sex, gender, religion, sexual orientation, gender identity, gender expression, national origin, veteran status or disability in its hiring, admissions, educational programs and activities.

4. Just about all the information that you want to see about your candidate can be found in the talent record, including the applicant’s current status on the requisition.

5. Click on the blue hyperlinks in the action log to view applicant Attachments or “forms”, including the GQ Job Responses (which show the applicants’ responses to the online application questions.)

6. If you would like to view ONLY the information related to the current requisition you are reviewing, you can select FILTER—This Folder in the Action Log section. You can also filter by type of item (such as forms, attachments, etc.)
HELPFUL TIP! Gateway Questionnaire Job Response Form—See entire applicant profile in one document

Click on the forms icon next to the candidate name to see any forms related to the applicant for the reqs to which you have access. When a candidate applies online, a Gateway Job Response Form is Created for them.

Gateway Questionnaire Job response form will include IN ONE DOCUMENT the following items...

- Contact information
- Cover Letter (if entered in the cover letter box of the application)
- Resume/CV
- Answers to questions on the Gateway application questionnaire
- Links to attachments they submitted
- Experience and Education Summary Page
- Source where they heard about the job

This form can also be PDF’s by clicking on the “view image PDF” button at the bottom and saved or forwarded to others for review.
HELPFUL TIP! Viewing MULTIPLE Talent Records Using “Speed Browse”

1. Speed browse allows you to view multiple talent records at one time.
2. Select the applicants you would like to review (or select all by clicking the box on the header), then select ACTIONS-SPEED BROWSE

3. You will then see a new screen, which shows the contact details, Resume/CV, Cover Letter and Experience and Education for all the selected candidates. Be sure to expand your window by selecting the box button on your browser.
4. You can click the various tabs to view the various sections.
5. The screen will show 4 talent records at one time, but you can use the arrow to move through groupings of applicants.

6. As you view the applicants, you can select them to use in various actions (such as update status, send communications, print resume, etc.)

eLinking Applicant Information

eLinks are used to send candidates’ talent records to any recipient to be viewed through email without the need for the recipients to log in to the system. You can send elinks from your Candidate Results Grid by selecting the candidate then going to Actions-Send eLink.

IMPORTANT NOTES ABOUT ELINKS: If you are elinking information to someone who is NOT on your req team, you should enter them in to the “non system users” field using their email address. If you select their name in the system user field, Career Zone team security will apply and they will not be able to view the resume/CV or attachments.
1. The elinked talent record will include the applicant’s resume and cover letter.
2. You can also choose to include other candidate attachments if the candidate included them—Select the attachments for the applicant that are applicable to the job you are asking the eLink recipients to review.

**NOTE ABOUT SECURITY OVER ATTACHMENTS and REQUISITIONS IN ELINKS:** In order to ensure there is adequate security over attachments and requisitions in the system, if you are sending an eLink of a candidate record to a system user who is **NOT on your requisition team**, they **will not** be able to view attachments. Please add their email to the “non-system user” field. Multiple emails can be separated by commas.

Access the Send eLink option from the candidate results portal by selecting your candidate then going to **Actions-Send eLink**.

3. Select the recipients to receive the elink. You can send your eLinks to internal **System users** (individuals who have requisition creation or applicant management access in Career Zone and are on your req team), or **Non-system users** (such as search committee members who are outside of RIT, RIT students OR internal employees who are NOT on your req team.)

4. For non-system users, enter the complete email address of the person you are sending the eLink to (i.e. JohnSmith@rr.com). To eLink to multiple people separate email addresses with a comma (no space). Persons listed in the cc or bcc options will not receive a link to the resume. They will simply receive an email saying the candidate’s information was eLinked.

5. Type a message in the box at the bottom of the form and click Send. The eLink email itself will have minimal information and include a link to the candidate’s name, so it is important, whenever you use eLink to **add some message text**.
Example of an email WITH a message (message highlighted in yellow):

Hi, I am Elinking Justin’s record for you to review.
Thanks, Gina

Click on the candidate's name to view their talent record in the RIT Career Zone system.

Any comments that you provide by clicking the respond button, will be emailed to the person who sent you the eLink.

Please do not forward this email to anyone else without prior consent of the applicant and the hiring manager. The information in this email is confidential and for the use of the search committee and recruiters only.

If you have any questions about this message, please email either the HR Recruitment Office at staffrec@rit.edu.

Help

Justin Beeber
Sample Position
RIT

View of an eLink by the recipient

The eLink recipient can click the respond button to provide feedback on the applicant. The feedback will be EMAILED to the eLink sender, but for security reasons, the notes WILL NOT be maintained on the candidate record.

If you are the recipient of an eLink response, you must SAVE the email notes for records retention purposes and submit at the end of the search to the recruitment office.

After you click SEND you will receive the following message:
Email message back to the person who sent the eLink:

```
From: gmw2366@rit.edu [mailto:gmw2366@rit.edu]
To: gmw2366@rit.edu
Subject: response to your eLink regarding Noel Keller.

gmw2366@rit.edu added the following comments. This person looks interesting! Great overall qualifications!
```

Personal Email Lists and Elinking

You can set up your own personal email list to use for elinking information on candidates (for example, you would like several people in your department or college to review a final list of applicants.) *Elink recipients do not need to be on the search team.*
You can go back to your personal email list to edit it at any time.

Select the candidates you want to elink—then go to Actions—Send eLink

Select your personal email list in the “TO: (e-mail lists)” dropdown. Complete your selections for the elink.
Send your eLink.

When the recipients click on the links in the email, they will be brought to the eLink screen.

**Bulk Print Send (New Functionality Still in Beta Stage for Testing)**

Bulk print is used for sending large numbers of candidate resumes, attachments and talent profiles to yourself in a Zip File.

1. Select the candidates to be included in the bulk print group.
2. Select Prepare for Bulk Printing from the Actions menu.

The bulk print job will be **sent to you directly via a link in an email**, so you can review the prepared Zip file and make any edits to the files listed before sending it to additional search team members.
By default, the text in the message recipient box will say:

**Security Precaution:**

Before forwarding the zip file to other users, please ensure that they have access to view the corresponding attachments, overview and resume.

Included in the zip file are ALL the candidates’ attachments related to ALL requisitions that you have access to. There will be no text on the elink form. If you want to send instructions or other information to yourself in the eLink, you can enter it in the Customize recipient message box.

We are still testing this functionality, but please note that this will send all documents and attachments for the applicants on requisitions that you have a MY relationship. You will not want to send the resulting Zip File without first reviewing the documents listed.

**Bulk Print Send Screen Shots**
Updating HR (Applicant) Statuses – Also known as Applicant Dispositioning and Applicant Tracking

As you move your applicants through the various stages of the hiring process, you must continuously update their status in the system. In addition to the goodwill that comes from providing applicants with information on their status in the application process, the information provided through applicant tracking is used for government and internal reporting. We are required to maintain this information. Timely update of the applicant statuses will also assist you in managing large applicant pools.

Who can update statuses?

Any member of the requisition team who has the requisition and applicant management level of access to the system can update applicant statuses. It is strongly recommended that only one person on the team be assigned the status update role. If someone needs access to updating applicant statuses, the hiring manager should email staffrec@rit.edu.

When should statuses be updated?

As soon as an applicant is deemed to not meet basic requirements for the posted position, their status should be changed to a final status of: Application No Longer Being Considered. You can update an applicant status by either clicking on the status reason next to the candidate’s name, performing an update of multiple applicants at one time, or by selecting the candidate and then selecting the action called: “Update Status”. If you are moving an applicant to a final status, the REQUIRED candidate disposition form must be completed. Please see the step by step instructions in this document.

Please refer to the “Applicant Status Cross Reference Guide” on page 6 to view all the status options. All applicants are defaulted to the initial status of “Pending Review and Screening” when they apply.

Will the applicant know the specific reason they were no longer considered?

There are no automated notifications sent to applicants from the system when their applicant status is changed, but there are many communication options available for hiring managers in the system. These communication options are shown in more detail in the Communications Section of the full user guide.

The applicants will be able to see that their status was updated on their talent gateway account, but they will never see the reason code on the disposition form. Please see page 5 for the cross reference between what statuses the search team sees and what the applicant sees.

When do I need to complete the disposition form?

Only “final” status updates require a disposition form to be completed. You will not see all statuses at every phase of the process—you will only see applicable statuses for each phase (for example, you will not see a hire status until after all pre-offer and offer steps have been completed.)

The only time you will need to complete the applicant disposition form is when you are moving an applicant to one of the following statuses:
STAFF Positions which require a disposition form are:

- 60-Application No Longer Being Considered
- 60-Job Cancelled
- 60-Offer Declined
- 75-Candidate Withdrawal

FACULTY Positions which require a disposition form are:

- 65-Application No Longer Being Considered
- 65-Job Cancelled
- 65-Offer Declined
- 75-Candidate Withdrawal

**UpdAtIng Multiple Applicant Statuses at One Time**

The Update Same Status feature can be used for updating the HR Status of more than one candidate at a time. When using Update Same Status, keep the following points in mind:

- Update Same Status can be used for rejecting candidates or moving them forward in the hiring process.
- To reject multiple candidates, they must be starting and ending at the same status AND they must have the same non-selection reason for the Candidate Disposition Form.
- All of the selected candidates will have a recorded copy of their own Candidate Disposition Form on their Talent Record.
  - Update Same Status cannot be used when updating applicants on faculty reqs to an HR Status that has an interview attached (interviews will be used for select faculty positions which will pilot and utilize the “Interview Builder” functionality for the phases of: Screen Application Materials, Phone Interview, Onsite Interview, and Conference Interview). If your search is not piloting the Interview Builder function, this should not apply to you. If your search is piloting the Interview Builder function, contact the Office of Faculty Recruitment & Retention to help attach your job’s interviews for each applicable status.

**Updating Multiple Applicant Statuses at One Time - Example**

1. Your position is posted with a minimum qualification of a PhD or other Doctoral degree.
2. Upon opening your candidate results panel, and sorting by the degree column, you decide to “final Disposition” the applicants who do not meet your minimum degree requirement.
   a. If desired, you can export the information in the grid for review, reporting and printing in Excel by selecting all the candidates and go to ACTION-Export to Excel (NOTE: All grids are exportable).
3. Select all of the candidates who do not meet the minimum degree requirement and who are in the same applicant status (in this case, 01—Pending Review and Screening).
4. In the candidate results grid, go to ACTIONS—UPDATE STATUS.

A box will pop up
prompting you to select a new status. In this case, since we are no longer interested in the applicant, you would select: **65- Application no longer being considered**.

6. Click the box that says: UPDATE and a Candidate Disposition Reason form will appear.

![Candidate Disposition Form](image)

7. Select a reason from the Candidate Disposition Form for the correct category, then click the SAVE box. **NOTE:** When you are updating multiple applicants at one time, they must all be receiving the same disposition non-selection reason.

**UNDOING AN APPLICANT STATUS**

1. If you accidentally update the applicant to a wrong status, you can return to the update status action and select “UNDO STATUS” (HR Status Update Box—Advanced Options-Undo Status).
**ADDING OR RE-ACCESSING A CANDIDATE DISPOSITION FORM THROUGH THE CANDIDATE RESULTS PANEL**

1. Either click the forms icon, or select ADD-Form from the Actions Menu.
2. The list of available forms will be at the top of the page.
3. Select the form and click ADD FORM.

4. The forms shown on the candidate forms screen are either forms that the candidate completed through the Talent Gateway, or forms that were completed for the applicant via your panel. You will only see forms that are related to searches for which you have access to view (through your “MY” relationship with the requisition).
5. Not all forms are viewable by every user type.

**NOTE:** Some candidate forms are only viewable by the form initiator and recruiters for security purposes (such as in the case of the New Hire EAF and Pre-Offer Approval Forms.)
SECTION 7: HIRING YOUR STAFF CANDIDATE

All external hires or internal hires (current employees moving to a new PC number), must be hired off of a Career Zone Requisition. Please refer to the Career Zone Requisition and Applicant Management User Guide for instructions on creating a requisition and reviewing your applicants. Before creating your requisition, you must discuss the opening with your HR Services Manager.

SALARY OFFER GUIDELINE CONSIDERATIONS:

Human Resources’ review and approval process will support RIT’s stated goal to compensate both faculty and staff, on average, at the 50th percentile (market midpoint) of our benchmark schools and appropriate labor markets.

- Generally, the pay range for someone who is relatively new to a position or who is still learning and developing his/her skills and abilities to meet all of the requirements of the new position should be between the minimum and the midpoint of the wage grade band for staff positions and below the midpoint of the discipline/rank labor market data for faculty positions.

- If an individual is fully functioning in a role, that is, they are able to perform all of the requirements of the position in a satisfactory manner; we would typically target the midpoint area of the wage grade for staff and the midpoint area of the discipline/rank for faculty.

- If an individual is expected to excel in the position, based on experience and demonstrated past performance, then their pay could be positioned above the midpoint of the appropriate wage grade band for staff and above the discipline/rank midpoint for faculty.

Note that there may be situations where a wage/salary increase is not appropriate due to an individual’s current salary and the location of that salary in relation to the market. Your Human Resources Services Manager (HRSM) will provide the appropriate guidance in these situations.

Finally, managers and supervisors should follow these guidelines while still maintaining the integrity of their budget.

GENERAL HIRE PROCESS STEPS:

Upon completion of the interview process, the hiring manager will select the candidate (the finalist), who best meets the needs and qualifications of the position.

The hiring manager will update the statuses of all other candidates in applicant pool to properly identify who was/was not interviewed.

a. Applicants who were not interviewed or were declined based on their qualifications, must be changed to “Applicant no longer being considered” and have the appropriate reason selected from the disposition form.

b. Candidates will not automatically receive a communication when they are dispositioned. You can communicate with your candidates by using one of the communication templates in the system.

STAFF STATUS CHANGES AND HIGH LEVEL STEPS (SEE DETAILED STEPS BELOW)

| Step 1: When you are ready to make an offer— | When you change the status to 40-Pre-Offer Process a Staff Pre-Offer Approval form will pop up. The Staff Pre-Offer Approval Form should be completed ONLY IF you are requesting offer terms which are different from what was approved on the requisition or if your business unit requires it. |
| Change applicant status to: 40-Pre-Offer Process | (the status on the applicant side will still show “interview”) |

Applicants who were not interviewed or were declined based on their qualifications, must be changed to “Applicant no longer being considered” and have the appropriate reason selected from the disposition form.

Candidates will not automatically receive a communication when they are dispositioned. You can communicate with your candidates by using one of the communication templates in the system.
<table>
<thead>
<tr>
<th>Step 2: Make a verbal offer and change applicant status to:</th>
<th>If you require assistance with determining an appropriate offer salary, please contact your HR Services Manager.</th>
</tr>
</thead>
<tbody>
<tr>
<td>40-OFFER EXTENDED</td>
<td></td>
</tr>
<tr>
<td>Let the candidate know that offers are contingent upon successful Background check results</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3: Send the candidate communication called: <strong>Staff Offer Background Check Request</strong> to request the applicant to complete a Criminal Background Check Authorization Form</th>
<th>Once the Staff Recruitment Office receives their form and runs the background check, they will contact you with the results.</th>
</tr>
</thead>
<tbody>
<tr>
<td>After Background check has been cleared by the staff recruitment office, <strong>send the candidate a formal offer letter</strong>. After they have accepted, change their status to:</td>
<td>Once verbal offer is accepted, hiring manager must send a written offer to the candidate for the candidate’s signature. Office of Staff Recruitment at <a href="mailto:staffrec@rit.edu">staffrec@rit.edu</a> will provide you with an offer template. Offer templates are not currently available in Career Zone.</td>
</tr>
<tr>
<td>50-Candidate Accepted Offer</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 4: When you are ready to complete the online Staff Hire EAF, you should change the applicant status to either:</th>
<th>Both of these statuses will pop up the appropriate Hire EAF form. The “Academic Affairs/Provost division only” form should be used for anyone in Academic Affairs/Provost division since it contains notifications specific to the Provost division.</th>
</tr>
</thead>
<tbody>
<tr>
<td>50-Prepare Hire EAF</td>
<td>You must have at least two approvers from within your department on the EAF.</td>
</tr>
<tr>
<td>50-Prepare Hire EAF (Academic Affairs/Provost Division Only)</td>
<td>The HRSM will confirm the EAF salary is in line with the Requisition or Pre-offer form and approve.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 5: EAF will be approved by the Staff Recruitment office once background check results are cleared. The form will then be routed to HR for processing.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>When the EAF has been fully approved and electronically sent to the HR department for processing, <strong>the candidate status will be changed to 90-Hire (Integrate to HRIS-HR Use Only)</strong> by the Staff Recruitment office.</td>
<td></td>
</tr>
</tbody>
</table>

**Staff Hire Applicant Status Changes Detailed Steps**

**Staff Pre-Offer Approval process**

1. To begin the hiring process, change the applicant status to **40-Pre-Offer Process**. The external status shown to the candidate at that point will still show “Interview”.

   **When you change the status to 40-Pre-Offer Process an OPTIONAL Staff Pre-Offer Approval form will pop up.**

   *The Staff Pre-Offer Approval Form should be completed ONLY IF you are requesting offer terms which are different from what was approved on the requisition or if your business unit requires it.*

Available statuses depend upon the current status of the applicant. For example, when your applicant is in the “20-Phone Interview” status, only certain other statuses are available as shown below.
2. If the form does not pop-up, you can access the form from the candidate results panel by either clicking on the FORMS icon next to the candidate’s name or going to Actions-Add Form).

3. Much of the information on the form will pre-populate from the requisition and the candidate’s application record. **For security purposes, the pre-offer approval form is ONLY visible on the portal to the person who created the form and not to other members of the requisition team.**

4. If needed, complete the form and route to the appropriate approvers for your business unit. You may BYPASS approver levels that do not apply to your specific situation. After you have selected your approvers, click the “Save and Send For Approval” button.

5. If at any time you would like to view where in the approval process your form is, you can refresh your forms page and click on the VIEW FORM icon.

6. The person(s) designated to receive a notification upon approval will receive an email once the form has been fully approved.

7. Make a verbal offer to the candidate.

**STAFF OFFER PROCESS AND BACKGROUND CHECK FORM**

1. Once the verbal offer is accepted, you should change the Applicant Status to **40-OFFER EXTENDED**

2. Send the candidate the Staff Offer Background Check Request Form email template. All offers are pending the results of the Staff Background Check Process.

3. Select the COMMUNICATIONS icon in the row next to your candidate’s name.
4. Select the communication called “Staff Offer Background Check Request”

5. Certain fields on the email communication will autofill from the requisition form using merge fields.

6. If any fields are missing, you will see a red flag at the bottom of the screen. You will need to correct the information before sending the communication.

7. You can add any additional information to personalize the communication as you desire.

8. Once all fields are completed, you can click “Preview” to view the communication.
   - The sent email will save to the candidate’s record on the Manager Portal in Career Zone, so take care to not put information in the email that cannot be viewed by the req team.

9. After verified, you can send the email to the candidate.

10. Once the candidate has completed and returned the background check forms to the Staff Recruitment Office, the Staff Recruitment HRA will run the background checks and contact you to let you know if your candidate cleared.
11. Once the background check is cleared, you should create a formal OFFER LETTER to send to the candidate. A copy of the OFFER LETTER is available in the Staff Recruiting, Interviewing and Hiring Guide at: https://finweb.rit.edu/humanresources/docs/Staff_Recruiting_Interviewing_Hiring_Guide.pdf

12. Once the candidate has formally accepted the offer, you need to change their status to: 50-Candidate Accepted Offer

**PROCESSING THE STAFF NEW HIRE EMPLOYEE ACTION FORM (EAF)**

1. When you are ready to complete the New Hire EAF, you should change the applicant status to either: 50-Prepare Hire EAF or 50-Prepare Hire EAF (Academic Affairs/Provost Division Only)
   a. If you are in non-Academic Affairs Divisions, you should complete the regular Staff New Hire EAF which should pop-up.
   b. If you are in Academic Affairs, you should complete the Staff new Hire EAF-Academic Affair/Provost Div which should pop up.

   (If the correct form does NOT pop up, click on the FORMS icon in the candidate results grid or go to ACTIONS-Add Form).

2. Route for approval based upon the requirements of the university and your business unit. There should be at least TWO departmental approvers on the EAF. Your HRSM is also a required approval level on the EAF.
Each approver will receive an email notification that they need to approve. They can enter approval mode by clicking on the hyperlinked name in the email.

3. Once the form is fully approved, the role or person indicated to be notified upon approval will receive an email.

4. If you would like to view where in the approval process your form is, you can refresh your forms page and click on the VIEW FORM icon and scroll to the bottom of the form.

If anyone in the approval chain is holding up the approval process, you may contact them or their designate. If they are on vacation, an email from them or someone acting on their behalf must contact Human Resources about bypassing their approval and approving the form on their behalf. Whoever approves the form on their behalf will show as the approver on the form.

1) Upon approval, Human Resources will also be notified to enter the data from the EAF into the Oracle system. This is not currently integrated with Oracle, so please allow time for the form to be manually processed in the Oracle HR system.
2) After the EAF is approved and sent to HR for processing, the Staff Recruitment Office will change the candidate to: 90-Hire (Integrate to HRIS-HR use only)

3) You must disposition all remaining candidates in order for the requisition to be changed from Open to Closed.

**SECTION 8: HIRING YOUR FACULTY CANDIDATE**

Below are the steps in the faculty candidate hiring process.

HR Status Changes Summary:

<table>
<thead>
<tr>
<th>Step 1:</th>
<th>When you are ready to make an offer—</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change applicant status to: 45-Pre-Offer Process</td>
<td></td>
</tr>
<tr>
<td>(the status on the applicant side will still show “interview”)</td>
<td></td>
</tr>
<tr>
<td>PRE-OFFER FORM WILL POP UP—COMPLETE THE FORM AND ROUTE THE PRINTED COPY, WITH ALL SUPPORTING DOCUMENTATION, TO THE APPROVERS LISTED ON THE FORM.</td>
<td></td>
</tr>
<tr>
<td>Faculty Pre-Offer Approval Form must be completed and approved <strong>BEFORE making any verbal or written offer to your candidate.</strong></td>
<td></td>
</tr>
<tr>
<td>If you require assistance with determining an appropriate offer salary, please contact your <a href="mailto:HRServices.Manager@rit.edu">HR Services Manager</a>.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2:</th>
<th>After Pre-Offer approval form has been approved....</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make a verbal offer and change applicant status to:</td>
<td></td>
</tr>
<tr>
<td>45-OFFER EXTENDED</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3:</th>
<th>Once the candidate has accepted the formal offer, change their status to: 55-Candidate Accepted Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once verbal offer is accepted, hiring manager must send a written offer to the candidate for the candidate’s signature.</td>
<td></td>
</tr>
<tr>
<td>You must create the Faculty Offer Letter by utilizing the template provided from the Provost’s office each year to the college dean’s office and liaisons.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 4:</th>
<th>When you are ready to complete the New Hire EAF, you should change the applicant status to either:</th>
</tr>
</thead>
<tbody>
<tr>
<td>55-PREPARE HIRE-EAF</td>
<td></td>
</tr>
<tr>
<td>The Faculty New Hire EAF form will pop up.</td>
<td></td>
</tr>
<tr>
<td>At least two departmental signatures are required on the EAF.</td>
<td></td>
</tr>
</tbody>
</table>

| Step 5: | When the EAF has been fully approved and electronically sent to the HR department for processing, the candidate status will be changed to 95-Transfer/Hire (Integrate to HRIS) by the HR Recruitment Office ([staffrec@rit.edu](mailto:staffrec@rit.edu))  |

Also refer to this link for Processing Faculty Pre-offers, Offers and Hires: [https://www.rit.edu/fa/humanresources/content/processing-faculty-hires-and-offers](https://www.rit.edu/fa/humanresources/content/processing-faculty-hires-and-offers)
Faculty Pre-Offer Process

NOTE: Some candidate forms are only viewable by the form initiator and recruiters for security purposes (such as in the case of the New Hire EAF and Pre-Offer Approval Forms.)

These steps should be performed in the Career Zone System:

To begin the hiring process:

- Change the applicant status of your top candidate to 45-Pre-Offer Process. The external status visible to the candidate will still show “Interview”.
- A Faculty Pre-Offer Approval form will pop up. If the form does not pop-up, you can access it by going to the candidate results panel for your requisition, selecting your applicant and either clicking on the FORMS icon next to their name OR going to Actions-Add Form.
- Complete the form with information on your primary candidate and two alternate candidates and ‘Save’.

You can obtain the diversity data of your candidates by going to their talent record and clicking on the EEO/Veteran's form or viewing the data in the candidate results panel on your applicant review portal.

- Print the form (It helps with print formatting to save first).
- Gather the necessary paper documents and route inter-office to the appropriate approvers for your business unit.
  - For security purposes, the pre-offer approval form is ONLY visible on the portal to the person who created the form and not to other members of the requisition team.
- If at any time you would like to view your form, you can go to the forms icon for your primary candidate and click on the hyperlinked form name.
- Route the paper packet to the applicable approvers listed for ‘ink’ signatures. It is best to expedite this by hand delivering.
- The printed form, along with the printed applicant materials (resume, cover letter, other related documents) for your top and two alternate candidates, must be forwarded to your Dean/Dept Head for approval.
- Once your Dean/Dept Head approves it, the entire printed packet must be sent to Jennifer Mastrangelo in the Provost’s Office, Eastman Building.
- Jennifer will contact you once the pre-offer has been approved.

If assistance is needed with the salary offer amount, please consult your HR Services Manager.

Faculty Offer and Hire (EAF) Process

1. Once the pre-offer approval form is fully approved, you can THEN make a verbal offer to the candidate and change the applicant status to: 45-Offer Extended.
2. Once the verbal offer is accepted, you should create the Faculty Offer Letter by utilizing the template provided from the Provost’s office each year to the college dean’s office and liaisons.
3. Receive a signed copy of the offer letter.
4. Once the candidate has formally accepted the offer, change the status of the applicant to 55-Candidate Accepted Offer
5. When you are ready to complete the New Hire EAF, you should change the applicant status to 55-HIRE EAF. (If the correct form does NOT pop up when you change the applicant to 55-HIRE EAF, you can click on the FORMS icon in the candidate results grid or go to ACTIONS-Add Form).

See copy of Faculty Online EAF Form next page:
6) Route for approval based upon the requirements of the university and your business unit. Each EAF must have at least two approvals from the department. Levels that are not required by your unit can be bypassed.

7) Once the form is fully approved, the role or person indicated to be notified upon approval will receive an email.

8) If you would like to view where in the approval process your form is, you can refresh your forms page and click on the VIEW FORM icon.

9) If anyone in the approval chain is holding up the approval process, you may contact them or their designate. If they are on vacation, an email from them or someone acting on their behalf must contact Human Resources about bypassing their approval and approving the form on their behalf. Whoever approves the form on their behalf will show as the approver on the form.

10) Another notification can be sent to the next approver by clicking on the button that says “ROUTE TO NEXT PENDING APPROVER”.

Full Career Zone Manager User Guide       Updated 2/27/2014
11) Upon approval, Human Resources will also be notified to enter the data from the EAF into the Oracle system. This is not currently integrated with Oracle, so please allow time for the form to be manually processed in the Oracle HR system.

12) After the EAF is approved and sent to HR for processing, the HR Recruitment Office will change the candidate to: **95-Hire (Integrate to HRIS-HR use only)**

13) **You must disposition all remaining candidates in order for the requisition to be changed from Open to Closed.**
SECTION 9: CLOSING OUT YOUR REQUISITION/JOB OPENING

It is extremely important that you final disposition any remaining candidates on your job opening after you have processed your hire. This is a university AND Government OFCCP requirement and subject to audit.

The recruitment offices will be unable to close your requisition until all of your remaining candidates are dispositioned, so your job will stay in OPEN (but NOT posted) status until this is done. The number in the ACTIVE candidates column of your “MY OPEN REQS” panel, will let you know if you still have candidates remaining.

Please email the HR Recruitment office at staffrec@rit.edu once all of your applicants are dispositioned so they can close out your requisition.
### Section 9: Applicant Status Cross Reference and Glossary

#### Faculty Applicant Status Cross Reference Guide

<table>
<thead>
<tr>
<th>HIRING MANAGER/SEARCH COMMITTEE</th>
<th>Applicant Masked (EXTERNAL) Name</th>
<th>Form to Pop Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-Pending Review and Screening (Faculty)</td>
<td>Application Received</td>
<td></td>
</tr>
<tr>
<td>05-Screen Application Materials</td>
<td>Screening</td>
<td>Form to complete may pop up</td>
</tr>
<tr>
<td>25-Phone Interview</td>
<td>Interview</td>
<td>Form to complete may pop up</td>
</tr>
<tr>
<td>25-Conference Interview</td>
<td>Interview</td>
<td>Form to complete may pop up</td>
</tr>
<tr>
<td>35-Onsite Interview</td>
<td>Interview</td>
<td>Form to complete may pop up</td>
</tr>
<tr>
<td>35-Reference Check</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>45-Credentials Check</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>45-Pre-Offer Process</td>
<td>Interview</td>
<td>Faculty Pre-Offer Approval Form</td>
</tr>
<tr>
<td>45-Offer Extended</td>
<td>Offer</td>
<td></td>
</tr>
<tr>
<td>45-Offer Revised</td>
<td>Offer</td>
<td>Faculty Pre-Offer Approval Form</td>
</tr>
<tr>
<td>55-Candidate Accepted Offer</td>
<td>Offer</td>
<td></td>
</tr>
<tr>
<td>55-Prepare Hire EAF</td>
<td>Offer</td>
<td>Faculty New Hire EAF</td>
</tr>
<tr>
<td>65-Application No Longer Being Considered</td>
<td>Application No Longer Being Considered</td>
<td></td>
</tr>
<tr>
<td>65-Job Cancelled</td>
<td>Job Cancelled</td>
<td></td>
</tr>
<tr>
<td>65-Offer Declined</td>
<td>Offer Declined</td>
<td></td>
</tr>
<tr>
<td>75-Candidate Withdrawal</td>
<td>Candidate Withdrawed Application</td>
<td>Candidate Disposition Withdrawal</td>
</tr>
<tr>
<td>95- Hire (Integrate to HRIS) <strong>HR USE ONLY</strong></td>
<td>Hired</td>
<td></td>
</tr>
</tbody>
</table>

#### Staff Applicant Status Cross Reference Guide

<table>
<thead>
<tr>
<th>HIRING MANAGER/SEARCH COMMITTEE SEES</th>
<th>Applicant Masked Name</th>
<th>Form to Pop Up</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-Pending Review and Screening (Staff)</td>
<td>Application Received</td>
<td></td>
</tr>
<tr>
<td>10-Screen Application Materials</td>
<td>Screening</td>
<td></td>
</tr>
<tr>
<td>20-Phone Interview</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>30-Onsite Interview</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>40-Reference and Credentials Check</td>
<td>Interview</td>
<td></td>
</tr>
<tr>
<td>40-Pre-Offer Process</td>
<td>Interview</td>
<td>Staff Pre-Offer Approval Form</td>
</tr>
<tr>
<td>40-Offer Extended</td>
<td>Offer</td>
<td></td>
</tr>
<tr>
<td>40-Offer Revised</td>
<td>Offer</td>
<td>Staff Pre-Offer Approval Form</td>
</tr>
<tr>
<td>50-Candidate Accepted Offer</td>
<td>Offer</td>
<td></td>
</tr>
<tr>
<td>50-Prepare Hire EAF</td>
<td>Offer</td>
<td>Staff New Hire EAF</td>
</tr>
<tr>
<td>50-Prepare Hire EAF (Academic Affairs/Provost Division Only)—Use for all Academic affairs areas</td>
<td>Offer</td>
<td>Academic Affairs/Provost Div Staff New Hire EAF</td>
</tr>
<tr>
<td>60-Application No Longer Being Considered</td>
<td>Application No Longer Being Considered</td>
<td>Candidate Disposition Form</td>
</tr>
<tr>
<td>60-Job Cancelled</td>
<td>Job Cancelled</td>
<td></td>
</tr>
<tr>
<td>60-Offer Declined</td>
<td>Off Declined</td>
<td></td>
</tr>
<tr>
<td>75-Candidate Withdrawal</td>
<td>Candidate Withdrawed Application</td>
<td>Candidate Disposition Withdrawal</td>
</tr>
<tr>
<td>90-Hire (Integrate to HRIS) <strong>HR USE ONLY</strong></td>
<td>Hired</td>
<td></td>
</tr>
<tr>
<td><strong>Auto-filer</strong></td>
<td>Feature in which resumes submitted for your jobs are automatically filed to the req folder associated with that position.</td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Auto Req ID</strong></td>
<td>The unique generated req number, assigned to each req in the system. An example of an auto req ID is 123BR.</td>
<td></td>
</tr>
<tr>
<td><strong>Candidate Type</strong></td>
<td>A term used to define the type of candidate one sees, such as internal (employee) or external.</td>
<td></td>
</tr>
<tr>
<td><strong>eLink</strong></td>
<td>A functionality allowing e-mail to be used to streamline the hiring process. The e-mails directed to search team members contain a link that allows them to review and provide feedback regarding candidates sent to them by the Hiring Manager or Recruiter.</td>
<td></td>
</tr>
<tr>
<td><strong>Filters</strong></td>
<td>Filters let you customize the panels of information that display on the Welcome Page.</td>
<td></td>
</tr>
<tr>
<td><strong>Forms</strong></td>
<td>Online versions of forms that are housed in Career Zone</td>
<td></td>
</tr>
<tr>
<td><strong>HR Status</strong></td>
<td>The term used to identify where in the hiring process/workflow a candidate lies, such as Phone Interview or Application No Longer Being Considered.</td>
<td></td>
</tr>
<tr>
<td><strong>Overview</strong></td>
<td>A tab found within the eLink of a candidate directed to Hiring Managers that displays a candidate’s contact, employment and education information.</td>
<td></td>
</tr>
<tr>
<td><strong>PDF Resume/CV</strong></td>
<td>A tab found within the eLink of a candidate directed to Hiring Managers that displays the PDF version of a candidate’s resume, if the candidate opted to upload his/her resume when applying for the job. The PDF retains all of the original formatting of the uploaded resume file.</td>
<td></td>
</tr>
<tr>
<td><strong>Req Folder</strong></td>
<td>A folder which is automatically created when a requisition is opened to store candidate resume data.</td>
<td></td>
</tr>
<tr>
<td><strong>Req Team</strong></td>
<td>A field on the job requisition that identifies the individuals responsible for the day-to-day recruiting activities involved with filling a job. Req team members have the ability to view all the details of the requisition, including candidates.</td>
<td></td>
</tr>
<tr>
<td><strong>Requisition</strong></td>
<td>A requisition, also referred to as a req, is an online form that documents position information. Requisitions maybe created by Hiring Managers or Recruiters.</td>
<td></td>
</tr>
<tr>
<td><strong>Respond (button)</strong></td>
<td>A button found within an eLink that allows the Hiring Manager to provide feedback to the Recruiter on a specific candidate. The response is directed in real-time to the sender’s email.</td>
<td></td>
</tr>
<tr>
<td><strong>Talent Gateways</strong></td>
<td>Job hosting portals that allow job seekers to search and apply for jobs.</td>
<td></td>
</tr>
<tr>
<td><strong>Talent Record</strong></td>
<td>This includes all applicants’/candidates’ information, including his or her resume, as well as any forms or notes associated with the application/candidate.</td>
<td></td>
</tr>
<tr>
<td><strong>Text Resume/CV</strong></td>
<td>A tab found within the eLink of a candidate directed to Hiring Managers that displays the text version of a candidate’s resume and (if one was included) the candidate’s cover letter.</td>
<td></td>
</tr>
<tr>
<td><strong>User Resource Center (URC)</strong></td>
<td>A website launched from within Kenexa 2x BrassRing that provides documentation; information on training, user groups and events; announcements; and other valuable information about talent management. Not all functionality shown in the URC is available to users. Delivered functionality is determined according to the needs of the Organization and how security is controlled and established. Questions related to available functionality can be directed to your recruitment offices.</td>
<td></td>
</tr>
</tbody>
</table>
**SECTION 10: CANDIDATE COMMUNICATIONS**

The following are important details regarding Communications:

- The e-mail templates have been defined by the system administrators and recruiters.
- Only individuals with the CZ Requisition and Applicant Mgmt Portal user access will be able to send candidate communications.
- Career Zone forms and links to job details posted to a Talent Gateway can be sent as part of the e-mail templates the Super User maintains.
- E-mail can be sent to up to 200 candidates simultaneously. Each e-mail recipient receives an individual e-mail.
- View a candidate’s Correspondence history by clicking the tab marked “Communications” within a Talent Record.
- E-mails can be personalized before they are sent.

**SENDING AN E-MAIL TEMPLATE**

You can easily send e-mail to candidates by selecting an e-mail template. These templates contain embedded greetings, merge tokens, Talent Gateway job links, forms and attachments for messages you frequently send to candidates, such as applicant status updates or follow-ups after interviewing.

**To send an email:**

1) Select a candidate (or candidates) from the candidate results grid and click **Send Candidate Communication** via the Actions menu.
2) Select the appropriate template from the **E-mail template** field and click the button marked **Go** to the right of the dropdown.
3) In the Candidate Results Grid, in the column next to your candidate’s name, click on the box next to the candidate’s name and then select ACTIONS-Send Candidate Communication. More information on communications is contained in the COMMUNICATIONS SECTION OF THIS MANUAL.
4) At the top of the screen, click in the **E-mail template** dropdown box, select the communication and click GO.

5) Certain fields on the email communication will autofill from the requisition form using merge fields. If any fields are missing, you will see a red flag at the bottom of the screen.
   i. You will need to correct the information before sending the communication
   ii. You can add any additional information to personalize the communication as you desire.
   iii. Once all fields are completed, you can click “Preview” to view the communication.
6) The e-mail template appears. Confirm and/or complete the From and Subject lines, as well as the e-mail’s Message Body text. Use the text editor and spell check options to assist you (the “expanded view” icon will open the communication in a larger size box). The email is FULLY CUSTOMIZABLE.

7) If you are sending to multiple candidates, all of their names will appear at the bottom:

8. Select any attachments you may wish to upload and include with your e-mail.

9. Under Candidate and Merge Information, the applicants you selected display. If an email address does not display for a candidate, de-select the checkbox appearing next to their name.

10. Click Preview if you wish to review your e-mail prior to sending. By clicking the arrow after the Candidate 1 of X > at the top of the screen, you can view the letter for each candidate.

11. After you have completed reviewing your letters, close out of the preview box and Click Send.
**Other Tips about Communications**

- A candidate’s e-mail address will populate only if one was included on the resume/CV
- You know a form is included in the E-mail template if the checkbox “Notify me when this form is submitted” appears
- When sending an E-mail template to multiple candidates, each candidate receives an individual e-mail and is not copied on the others’ correspondence.
- Should you decide not to use an email template when communicating with the candidate, you may select the Send Candidate Adhoc Email option from the Actions menu to create your own email.
- A copy of the email is stored on the Candidate Talent Record under the Communication Tab.

**Section 11: Requisition Approvals in Career Zone**

A full users guide for approvers is available at:

https://finweb.rit.edu/humanresources/recruitment/manager_resources/approversguide.pdf

**Steps to Initiate Requisition Approval**

Once the fields of the req form have been completed by the requisition creator, users initiate the approval process using a function called “Smart Approval”.

- The person selected in the Hiring Manager field on the requisition (req) determines which approval hierarchy is populated
- The approval chain is pre-determined based on a combination of the supervisory and organizational hierarchy, as well as special rules which apply to certain colleges and divisions.
- Additional approvers can be added to the list, but no approvers can be removed
- It is important to note that once a req has been submitted for approval, edits can no longer be made to that req by the requisition creator, hiring manager, team or approvers (with the exception of edits to the requisition team which can be made by using the “update multiple reqs” function)
- Once a requisition is approved, it will need to be posted to the Applicant Talent Gateways by the HR Recruitment Office. Posting in this system is not “automatic”. This provides the ability for the recruiter to approve but then make minor changes to the job posting before it appears on the talent gateways.

**The Approval and Posting Process Summary:**

- A requisition creator must click the START WORKFLOW button at the bottom of the workflow box to start the workflow process
- While a req is out for approval, the req status is Pending
- Each approver in sequence receives an email containing a link where they can review the req details
- An approver can either APPROVE or DECLINE a req
- Approval and Decline comments are visible to the entire req team and other approvers. Information that should not be seen by your req team (such as the full salary amount) should not be put into the comments.
- A Declined requisition can be copied and re-submitted for approval by the creator of the req.
- Declined requisitions in this system are maintained in a “declined” folder for the creator. They are not purged from the system.
- The job status becomes Approved when it has been approved by all approvers in the approval list
- The job status does not change to OPEN until the recruiter posts the requisition to the talent gateway. Once it is open and posted, the applicants will be able to view the job on the talent gateways.
IF YOU ARE AN APPROVER AND HAVE RECOMMENDED CHANGES TO A REQ

- You have the option to either Approve or Decline a Req.
- If a requisition is declined by an approver, the requisition creator cannot make changes to the req. They must save the requisition as new, make changes and re-start the approval process. The copying of the requisition creates a new “BR” requisition number (similar to the “IRC” number in iRecruitment.

HINT: If an approver only has minor edits to the requisition, rather than declining the requisition, they can put notes in the approval comments so that the recruiters can make the changes prior to posting. This will prevent the req creator from having to create a whole new requisition.

REQUISITION APPROVAL SCREEN SHOTS

START WORKFLOW BOX

- After the requisition creator enters their information to the requisition and clicks the SAVE and CONTINUE button, the Start Workflow box appears.
- At that point, they can no longer make requisition edits
- They can add additional approvers, but they cannot delete seeded approvers
- They can “START” the workflow
- The requisition is in “PENDING” status

INSERTING AN ADDITIONAL APPROVER—SCREEN SHOT
**Adding an FYI Approver**

An FYI approver is someone who needs to be notified about the requisition but does not need to approve.

**FYI approver notice can only be sent when someone is approving.**

In smart approval, before you click the button to approve, you can go the section called: Insert Additional Approver

- Search for the person who you want to send the FYI approval to,
- Highlight their name,
- Click the + sign next to “add fyi approver”.
- Once you hit APPROVE, the FYI approval email message will be generated.

The FYI approver will show up as a “comment” in the comments tab of the smart approvals screen.
Email received from workflowmanager@trm.brassing.com requesting you to approve.

What you will see when you click on the link to approve:

**IMPORTANT: SALARY AND BUDGET INFORMATION IN THE REQUISITION**

Due to security considerations over salary information in the system, requisition creators and approvers are asked NOT to enter full salary details in the req or approval comments if they do not want req team members to be able to view the information. RATHER, they are asked to enter any information to the approvers about requisitions that will exceed salary budget.

The following note appears on the requisition:

*If you anticipate making an offer which will exceed position budget, provide your justification as well as the funding source that will be utilized to permanently cover the difference in intended offer vs.*
budgeted salary. (i.e., How are you re-allocating your salary budgets to accommodate this?) Do not list specific offer salary amount in this field, but rather, indicate source of additional funding. **Explanations and approvals at the requisition stage will facilitate future approvals of offers and EAF’s.**

**Viewing Reqs Pending Approval**

Users on the req team will see all reqs pending approval for which they are a Hiring Manager, Requisition Creator or on the Req Team. If they are an approver of the requisition, they will see a checkmark in the APPROVE column.

**Features on the Smart Approval Screen**

If an approver entered comments, there will be a note that says “comments” and the comments will be on the comments tab. **Comments will also show any ad hoc approvers added to the approval workflow.**

Approver that YOU or someone else inserted during the approval process

Original Next approver

“Printer Friendly version” icon

Box for approval comments (visible to entire requisition team)
Once you approve or decline the requisition, you will receive this message on your screen:

Thank you. Your actions have been successfully recorded.

As requisitions are approved, you can see the word **APPROVED** in the status:
HOW TO GET BACK TO THE SMART APPROVAL BOX

Locate the requisition in the My Reqs Pending Approval panel and click on the requisition number.

The requisition will then appear and a "VIEW APPROVALS" box will be at the top of the screen. The smart approval box will appear.

HOW TO VIEW APPROVAL WORKFLOWS THAT YOU ARE PART OF

After you click on the View Approvals Box on your requisition screen, Click on the APPROVALS tab at the top of the smart approval view.

If you go to your APPROVALS tab, you can view any workflows that you are a part of. If you are the NEXT approver, you will appear in the "Waiting For" column.
If it is your turn to approve, you can approve right from this screen by selecting the requisition and clicking the approve button at the bottom.

**Changing your Own Approval Notification Settings**

By going to your “My Profile” tab, you can change some of your settings. If you prefer NOT to receive elink notifications for approvals, you can turn it off.

If you prefer not to receive notifications of any approval activity, you can turn it off and select to just receive notifications when you need to approve.
Vacation Rules for Requisitions (AKA How to set an "Alternate" for Smart Approval (similar to a Vacation Rule in Oracle))

Vacation Rules for Requisition Approvals can be set through the Smart Approval window. The functionality is called “Setting Alternate Approvers”. Vacation rules in Oracle do not impact vacation rules in Career Zone (Kenexa 2XBrassring).

1. Person logs into Career Zone and navigates to Reqs > Smart Approval.
2. Select the My Profile tab and on the right is a Box called My Alternates.
3. Enter the last name of the person who should be the alternate and hit search.
4. Select the desired person and click on Add. Then click SAVE.
5. Please Note the two items below:
   - If the person who sets up an Alternate does not want to receive any notifications and just wants the Alternate to get the emails, they need to set the option eLink Notification to OFF. If they leave it as ON, both the original approver and the Alternate will receive an email and either can approve.
   - In order for the Alternate to receive an email, under their Profile, (Reqs-Smart Approval-My Profile) in the Alternate Notification box, they need to check the box for Receive Notifications under Alternate Notifications for the person they want to approve on behalf of. If they do not check this box they will need to manually go into Smart Approval through 2xB and query up the approval (see screen show in next page).

How to Turn Off Your Alternate Approver for Smart Approval (similar to a Vacation Rule in Oracle)

1. When you no longer wish to have your alternate approving your requisitions, click the REMOVE button next to their name in gray and white Name box.
2. Click SAVE.
**TURNING ON SMART APPROVAL NOTIFICATIONS WHEN YOU ARE DESIGNATED AS SOMEONE’S ALTERNATE.**

If you want to receive email notifications when you are someone’s alternate, you must click the box next to their name in the “Alternate Notifications” area.

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**SECTION 11: CANDIDATE FORM APPROVALS IN CAREER ZONE**

**CANDIDATE EAF AND PRE-OFFER FORMS WITH APPROVALS**

(Candidate forms such as EAF and Pre-Offer do not use “Smart Approval”. Approvers must be entered on to the form. See the Staff and Faculty Hire sections for specific instructions on using these forms)

**VIEW AND SAVE CANDIDATE FORMS IN PDF FORMAT**

At the bottom of each saved candidate form, you will now see a button which says “View Image PDF”. You can use this button to create a PDF image of your form to send to someone or save for your records.
**RE-SENDING AN APPROVAL NOTIFICATION FOR A CANDIDATE FORM**

If you need to re-send an email reminder to an approver for a candidate form, you can do the following:

1. Locate your candidate, then click on the forms icon next to their name
2. Click on the name of the pending form
3. Click on the button that says “Route to Next Pending Approver”

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**VACATION RULES FOR CANDIDATE FORMS (EAF AND PRE-OFFER APPROVAL)**

IMPORTANT: There is currently no Alternate Approver or “Vacation Rule” functionality available for Candidate forms. If you will be unavailable to approve candidate forms for a period of time, please send an email to the HR Recruitment Office at staffrec@rit.edu to let them know who will be able to approve forms on your behalf.

We are working with Kenexa 2X BrassRing for a solution around form alternate approvers and will update these procedures as soon as a solution is obtained.