Faculty eRecruit

QUICK REFERENCE GUIDE

Create a new position.

Update an existing position.

Copy a position.

Search all positions.

Position Management

- **Includes the job ad, department and rank.**
- **Also includes the position budget.**
- **Has its own unique 8 digit number.**
- **Searchable by all recruiters.**
- **Central approval required on tenure and tenure track positions**
- **Contains the 'Will you be posting this position' check box.**
- **Overall position status must be 'Ok for eRecruit' to be used with eRecruit.**

Create a Job Opening from an approved position.

Complete Job Posting information.

Create New Job Openings/Postings

<u>Job Opening</u>:

- **Has its own unique four digit Job ID.**
- **Identifies the desired start date and term of employment.**
- **Identifies the FTE of the appointment.**
- **Identifies interview team members.**

<u>Posting</u>:

- **Identifies posting dates.**
- **Select optional introductory/closing wording if.**
- **Identify additional posting destinations and upload copy of ad.**

Review your applicants/resumes.

Create offer and offer letter.

Complete hire to payroll.

Manage Applicants and Openings

- **Route applicants to your interview team.**
- **Add new applicants that applied outside the system.**
- **Decline applicants.**
- **Record interview schedule.**
- **E-mail your applicants.**
- **Generate an offer letter.**
- **Submit offer to approvers.**
- **Upload documents.**
- **Prepare applicant for hire.**
- **Assign employee ID and CWL pin.**
- **Save and Submit to payroll.**

The complete eRecruit manual can be found at:
http://www.hr.ubc.ca/media/UBC-Faculty-eRecruit-Training-Manual-Feb-2013.pdf

Prepared by UBC Human Resources
HR Management Systems
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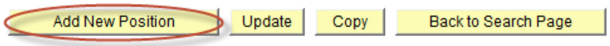
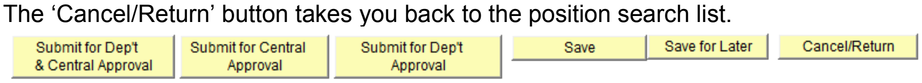
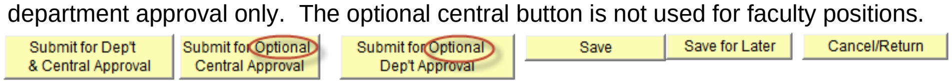
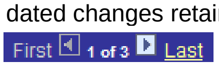
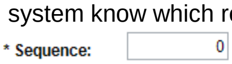
Quick Steps

(Section column refers to section in Faculty eRecruit Training manual)

Steps	Module	Section
Position Management		
• If your position already exists and you want to update it, go to step 2.		
• If your position already exists, doesn't require any changes, is approved for eRecruit and you want to create a job opening so you can post it, go to step 4.		
• If you've recently posted a job and want to re-post it (within 90 days), go to step 5.		
Step 1: New Position		
• If you find an existing position that's close to what you need (your own or another department's), you can copy it. Go to step 3.	Position Management	2.5
• To create a new position, click on 'Add New Position' from the search results page. Complete all the tabs.  	Position Management	2.2
• Each position is given a unique number.	Position Management	2.2
• You usually create a position just once for your organization. If the position becomes vacant, then you can go directly to step 4 (unless the job ad or rank needs to be changed, then you update the position first via step 2).	Position Management	2.2
• The position defines the rank, department, reporting hierarchy, job ad and budget. It also keeps a history of changes to the position.	Position Management	2.2
• If you are posting the position on the UBC web site ensure that the posting box is checked.  		2.2
• Department approvals are required for all new positions. • Central approvals are required for tenure and tenure track positions only. • You can submit these approvals independently (see buttons below), or together (by clicking on the 'Submit for Dept & Central Approval' button. • The 'Save for Later' button saves a draft version of your position. You can return later and finish your data-entry. • The 'Save' button is only used when updating positions where no fields were changed that require a position to be re-approved. • The 'Cancel/Return' button takes you back to the position search list.  	Position Management	2.3
• If your position does not require approval (dept or central), the word 'Optional' is inserted into the button name. You can use these buttons to optionally send positions for department approval only. The optional central button is not used for faculty positions.  	Position Management	2.3
• When approvals are submitted, the initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched. • Make corrections is necessary.	Position Management	2.3
Step 2: Update An Existing Position		
• Do this step if: a. You need to update an existing position (job description, budget, etc.). b. It has been pushed back for correction by an approver.	Position Management	2.4
• Unless your position is in 'Draft' status, your position will not be updateable. • If it's not updateable, click the + (plus) sign near the upper right corner of the screen.  • This creates a new version of your position with its own event date. This feature allows you to record a history of changes so you can see how the position evolved over time. All dated changes retain the same position number.  • You can have multiple versions of your position with the same event date. If this happens, the system will increment the sequence number automatically. This will let you and the system know which record is the most recent when the dates are the same.  The 0 will change to a 1 on the latter version of the same event date.	Position Management	2.4

• Make changes/corrections is necessary.	Position Management	2.4
• Department re-approvals are required as follows: change the job code, term to ongoing, inactive to active, extend the term, new speedcharts, budget changes over 10%. • Central re-approvals are required if you change the job code and/or job ad for tenure and tenure track positions only. • You can submit these approvals independently (see buttons below), or together (by clicking on the 'Submit for Dept & Central Approval' button. • The 'Save for Later' button saves a draft version of your position. You can return later and finish your data-entry. • The 'Save' button is only used when updating positions where no fields were changed that require a position to be re-approved. • The 'Cancel/Return' button takes you back to the position search list. Submit for Dept't & Central Approval | Submit for Central Approval | Submit for Dept't Approval | Save | Save for Later | Cancel/Return	Position Management	2.3
• If your position does not require approval (dept or central), the word 'Optional' is inserted into the button name. You can use these buttons to optionally send positions for department approval only. The optional central button is not used for faculty positions. Submit for Dept't & Central Approval | Submit for Optional Central Approval | Submit for Optional Dept't Approval | Save | Save for Later | Cancel/Return	Position Management	2.3
• When approvals are submitted, the initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched. • Make corrections as necessary.	Position Management	2.3
Step 3: Copy a Job Description		
• Search for a position that's similar/identical to what you need. • From the search list, click the check box next to the position number and then click the 'Copy' button. Add New Job Description | Update | Copy | Back to Search Page • From this point forward, instructions are the same as step 2 – Updating an Existing Position. • Please ensure to update and edit all department information, review contents of the job ad to make sure it suits the needs of your unit, and add a position budget.	Position Management	2.5
Step 4: New Job Openings/Postings		
• If your job opening and initial posting already exists and you are just doing a re-post, go to step 5.	New Job Openings/Postings	
• You create a Job Opening from an existing, approved position. Each Job Opening is given a unique Job ID number (like a Competition Number).	New Job Openings/Postings	3.1
• You are required to enter: available openings, recruiting location, desired start date, whether it is term or ongoing, and the FTE. • You can optionally enter the name of the employee being replaced. You can also start to assemble your interview team. Interviewers (must be a UBC employee)	New Job Openings/Postings	3.1
• You add the initial posting to the job opening page. Create New Job Posting/Repost	New Job Openings/Postings	3.1
• The eRecruit system assists you by defaulting in the posting start and end dates. You can change these within the constraints of our collective agreements.	New Job Openings/Postings	3.1
• You can add opening and closing wording by selecting them from the pull down menu in the job opening details/posting information page. • An equity/immigration statement is automatically added.	New Job Openings/Postings	3.1
• When your opening/positing is complete, submit it for department approval. • Sep 1: Click on the 'Review and Confirm Approvers' button. Review and Confirm Approvers • The initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched. • Corrections may be necessary. • Return to the opening posting page. If approver corrections are required, click on 'Save for Later', fix your approver issues, return and start the approval process again. • Step 2: If your approvers are ok, click on the 'Save & Submit' button. Save & Submit | Save as Draft | Cancel	New Job Openings/Postings	3.2

• Your approvers can either approve your job opening/posting or push it back for changes. • For job openings, it is allowable for an approver to also be the initiator.		
Step 5: Re-post		
• Access an existing Job Opening from the ‘Manage Applicants and Openings’ menu by entering in the position number or by using the search criteria fields.	Manage Applicants and Openings	3.3
• Once your Job Opening is on the screen, click on the hyperlink: ‘Job Opening Details’. Job Opening Details • You can do re-posts and update your interview team list. • You add the re-post to the job opening the same way you added the original posting (see step 4). Create New Job Posting/Repost • Hit the ‘save’ hyperlink. Save • Reposts do not require re-approval so once saved it will be posted when specified.	Manage Applicants and Openings	3.3
Step 6: Manage Applicants		
• Access an existing Job Opening from the ‘Manage Applicants and Openings’ menu by entering in the Job ID number or by using the search criteria fields. • Once here, you can view your Job Opening.	Manage Applicants and Openings	5.1
• **TIP:** you won’t receive an email notification once your Job Opening closes so you will need to keep track of the positions you posted and the closing dates of the postings.		5.1
• Use the ‘Job Opening Details’ hyperlink to do re-posts and update your interview team. Job Opening Details a. See Step 5 for details on reposting. b. To update your interview team, click on the ‘Add Interviewers’ hyperlink on the job opening screen. Add Interviewers c. Once added, click on the save button Save on the bottom of the screen. d. To remove interviewers, click on the trash bin symbol to the right of ‘Interviewer ID’.	Manage Applicants and Openings	5.1 3.1
• Use the ‘Add New Applicant’ hyperlink Add New Applicant to add paper applications and applications received via email.	Manage Applicants and Openings	5.2
• **TIP:** if you would like perform a group action for all applicants, use the check boxes in the left column, or click on the ‘Select All’ or ‘Deselect All’ hyperlink Select All Deselect All • Then click on the ‘Group Action’ drop down menu Group Action: to see the group action options.		5.1
• Use the ‘Select Action’ drop down menu *Select Action... under the ‘Take Action’ column to perform an action on a single applicant. Select one of the following actions: 1. Route Short List Applicant (Optional) – to short-list applicants/resumes to interview team. Once applicants/resumes have been short-listed, interviewers will receive an email indicating applicants/resumes are ready for review in their CWL self-service portal. 2. Please note that applicants/resumes are not automatically short-listed. You must manually route them to your interview team. 3. Decline Applicant (Optional) – to decline the unsuccessful applicant(s). • The system will automatically decline applicants once someone is hired into the position. 4. Manage Interviews (Optional) – to schedule interviews for applicants. 5. Prepare Job Offer (Mandatory) – prepare job offer for successful applicant. • This includes generating the offer letter and submitting the job offer for approval. • Once you receive the offer letter in your inbox, please format the offer letter on your department letterhead and have the designated person in your department sign the offer letter. Upload the offer letter on department letterhead into the system as ‘Modified Offer Letter’ (009) – see ‘6. Pre-Hire Documents’ for instructions. • Once you receive a confirmation email that your Approver has approved the job offer, you can then move to ‘7. Prepare For Hire’ to complete the hire. 6. Pre-Hire Checklist (Optional) – a list of documents that are typically needed when hiring an applicant.		5.4 – 5.12

7. Pre-Hire Documents (Mandatory) – this is where you upload offer letters (modified offer letters on department letterhead, signed M&P offer letters), SIN cards, and if applicable foreign hire documents. 8. Prepare For Hire (Mandatory) – final step in hiring an applicant after the job offer is approved. • Performed by department for non-tenured hires only. • Performed by Faculty Relations for tenured hires. • Here you would select the type of appointment, assign an early employee ID, and receive the employee's CWL pin number. • Once you've completed the information, 'Save and Submit' the offer to prepare the employee for hire. Once this is done, Payroll can then transfer the information into HRMS and payroll. • This step replaces the paper Staff Appointment form so do not send a copy to HR or Payroll. Email Applicant (Optional) – contact the applicant via e-mail. Each applicant will receive an individual email although it will appear as though everyone is cc'd on the same group email.		
Step 7: Make an Offer or Adjust an Existing Offer		
Make an offer:		
• Access an existing Job Opening from the 'Manage Applicants and Openings' menu by entering in the Job ID number or searching the fields.	Manage Applicants and Openings	5.11 – 5.12
• If you are preparing the offer for the first time, select take action '4. Prepare Job Offer' from take action drop down menu.	Manage Applicants and Openings	5.11 – 5.12
Steps	**Module**	**Section**
• If you are correcting/editing an existing offer, go to the 'Adjust an existing offer' section below.	Manage Applicants and Openings	
• Everything entered on the Offer page affects the offer letter that is generated and the electronic appointment that goes to Payroll. • On the Offer page, check/change the appointment dates, enter the offer amount and FTE, identify citizenship status, and enter the earnings and speed chart information. If the offer is an extension of the current appointment, check the extension button. Is this job offer an extension of a current term position? ☐ • To use the system generated offer letter, click the 'Generate Offer Letter' hyperlink. The offer letter will be sent to your inbox as a Word document in an email. Format the offer letter on your department letterhead and have the designated person in your department sign the offer letter. • If you have your own offer letter template, fill in the appointment and applicant details an upload it using the 'Upload my own offer letter' hyperlink. Generate Offer Letter Upload my own Offer Letter	Manage Applicants and Openings	5.11 – 5.12
• If your offer is incomplete and you want to return later to finish it, click on the 'Save for Later' button. If you elect to 'Save for Later' your offer will be in draft form and will not be sent to for approval.	Manage Applicants and Openings	5.11 – 5.12
• At this point, the next steps differ for tenured and non-tenured offers.		
Tenured Offers:		
• When your job offer is complete, submit it for approval as per below: • First step: Click on the 'Save' button. • Second Step: Once the offer is saved: a. The 'Print Appointment Form' button is ungreyed. Click on this button to generate a Faculty Appointment form. Save Print Appointment Form b. Complete any missing fields on the form. c. Assemble the faculty hiring package and circulate within the department t and Dean's office for approvals. d. Forward the approved hire package to Faculty Relations. e. Faculty Relations will complete the 'Prepare for Hire steps' for you.	Manage Applicants and Openings	5.15
Non-tenured Offers:		
• When your job offer is complete, submit it for approval as per below: • First step: Click on the 'Review and Confirm Approvers' button. Review and Confirm Approvers • The initiator is taken to the 'Review and confirm Approvers' page where they can check	Manage Applicants and Openings	5.15

their Approvers before Workflow is launched. • Corrections may be necessary. • Return to the job offer page. If approver corrections are required, click on 'Save for Later', fix your approver issues, return and start the approval process again. • If your approvers are ok, click on the 'Save & Submit' button. Save & Submit · Save as Draft · Cancel • Your approvers can either approve your job offer or push it back for changes. • For job offers, it is not allowable for an approver to also be the initiator.		
Adjust an existing offer:		
• If you need to re-access your offer to either complete it or make corrections: a. Locate your applicant in 'Manage Applicants'. b. Look in the Disposition column and find the disposition of your offer'. It might say 'Draft Offer' or 'Offer Pending'. Click on this hyperlink. OfferPendg DraftOffer c. Scroll to the bottom of the offer screen and locate the 'Edit Offer' hyperlink. Click this before you start making corrections. Edit Offer d. Make changes/edits and generate the offer letter. e. Once you receive your offer letter, proofread it for accuracy. Upload the modified offer letter in '6. Pre-Hire Documents'. M&P signed offer letters must be uploaded under '6. Pre-Hire Documents' in the take action drop down menu before moving to step 8. f. Once you're done, you need send your offer for approvals. g. The approval process differs for tenured and non-tenured approvals (see below).	Manage Applicants and Openings	5.11 – 5.12
Tenured Offers:		
• When your job offer is complete, submit it for approval as per below: • First step: Click on the 'Save' button. • Second Step: Once the offer is saved: a. The 'Print Appointment Form' button is ungreyed. Click on this button to generate a Faculty Appointment form. Save · Print Appointment Form b. Complete any missing fields on the form. c. Assemble the faculty hiring package and circulate within the department t and Dean's office for approvals. d. Forward the approved hire package to Faculty Relations. e. Faculty Relations will complete the 'Prepare for Hire steps' for you.	Manage Applicants and Openings	5.15
Non-tenured Offers:		
• When your job offer is complete, submit it for approval as per below: • First step: Click on the 'Review and Confirm Approvers' button. Review and Confirm Approvers • The initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched. • Corrections may be necessary. • Return to the job offer page. If approver corrections are required, click on 'Save for Later', fix your approver issues, return and start the approval process again. • If your approvers are ok, click on the 'Save & Submit' button. Save & Submit · Save as Draft · Cancel • Your approvers can either approve your job offer or push it back for changes. • For job offers, it is not allowable for an approver to also be the initiator. • Once the job offer is approved, you will receive a confirmation email. Once you receive this email, you can move forward to step 8 below.	Manage Applicants and Openings	5.15
Step 8: Hire		
Prepare for Hire:		
• Access an existing Job Opening from the 'Manage Applicants and Openings' menu by entering in the Job ID number or searching the fields.	Manage Applicants and Openings	
• To prepare the hire, select '7. Prepare For Hire' in the take action drop down menu.	Manage Applicants and Openings	5.16
• On the hire page, you will notice 3 tabs. Complete any missing information on each tab and 'Save and Submit' your hire. You don't need to click the 'Save and Submit' button on every tab; you only need to click the 'Save and Submit' button once everything is filled out. a. 'Preliminary Data' tab: this is where you would check the appointment start date,	Manage Applicants and Openings	5.16

select the type of hire, indicate the applicants ranking, and if applicable assign an early employee ID and CWL pin number. b. 'Employee Personal Information' tab: this is where information data about the employee is found. For new hires to UBC, the 'Biographical Details' section will need to be completed. c. 'Appointment Information' tab: this is where you would check the appointment dates, select the appropriate 'Action Reason' corresponding to the type of hire, and check the salary. d. Once all the information in all three tabs is complete, do a 'Save and Submit' to send the hire to Payroll. • Once Payroll has transferred the hire from eRecruit into payroll, you will receive a confirmation email. You will be able to see the hire and the job ID he/she was hired into in HRMS at this point. • Once Payroll has transferred the hire, all other applicants who applied for the position will be automatically declined. The disposition of the successful applicant will show as 'Hired' and the number of available openings will show as '0' or be reduced by 1 if the position was posted with multiple vacancies. • Do not send Payroll or HR a paper staff appointment from for the hire done through eRecruit as it is not needed. • If applicable, please have the hire complete and send all required paperwork (personal data, tax, direct deposit forms, and ect.) to Payroll directly.		